Burnaby Economic Development Strategy (EDS) 2020

City of Burnaby

Adopted by Council
2007 March 12

Icon Legend

S1: Information Technology, Communications/ Wireless

S2: Biotechnology, Health, Life Science

S3: Film, Television, Digital Entertainment, New Media

S4: Education

S5: Environmental Technology, Services

S6: Tourism, Sport/ Tournaments, Arts/Culture, Retail

S7: Finance, Management, Professional Services

S8: Light Industry, Warehousing/ Distribution

S9: Heavy Industry

S10: Agriculture

S11: Social Integration, Not-for-profit

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Agriculture:	Tasia Richards, *United Flower Growers*
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Biotechnology:	Dr. Donald B. Rix, *Chairman of the Board of Directors, MDS Metro*
Business:	Brad Alden, *Publisher, The Burnaby NOW (and Past President Burnaby Board of Trade)*
	Mymee Chow, *Purrfect Flowers & Tings (and Past President, The Heights Merchants Assoc.)*
	Debbie Zurowski, *Edmonds Town Centre Business and Community Association*
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Development (Residential):	Michael Geller, *President, SFU Community Trust*
Education (K-12):	Dr. Phil Moir, *retired educator*
Education (Post-Secondary):	Dr. Michael Stevenson, *President & Vice-Chancellor, Simon Fraser University*
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Finance:	Kevin Zakus, *Vice-President Business Banking, VanCity*
Health Care:	Dr. Paul H. Wright, *Orthopaedic Surgeon, Clinical Associate Professor*
Media:	Darlene Osborne, *Publisher, Burnaby NewsLeader*
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	Bonney Rempel, *Marketing Director, 20 Vic Management Inc. (Lougheed Mall)*
Social (Not-for-profit):	Susan Papdionissiou, *Director, Agency and Community Services, United Way of the Lower Mainland*
	Patrice Pratt, *Board of Directors United Way of the Lower Mainland*
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	Sev Morin, *Consultant*
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Technology:	Dave Wall, *President, NORPAC Controls*
Union:	Lee Loftus, *International Union of Operating Engineers (IUOE), Local Union 115, BC & Yukon Territory*

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Workshop "A": Light Industry, Heavy Industry, Warehouse/Distribution

Bob Denboer, *GVRD, Policy & Planning* ❖ Colin Hartwell, *Canadian Manufacturers & Exporters* ❖ Lee Loftus, *International Union of Operating Engineers (IUOE)* ❖ Gerry McRae, *Chevron* ❖ Larry Morgan, *Canada Lands* ❖ Kevin Zakus, *VanCity*

Workshop "B": Education

Dr. Daren Hancott, *University of Phoenix (Burnaby campus)* ❖ Dr. Phil Moir, *retired educator* ❖ Dr. Jim Reichert, *BCIT* ❖ Wayne Robert, *Knowledge Network* ❖ Sheila Rooney, *Burnaby School District 41* ❖ Dr. Michael Stevenson, *Simon Fraser University*

Workshop "C": Biotechnology, Life Science, Health Care,Post-secondary Research/Technology Commercialization

Ziba Afshar, *SFU, University Industry Liaison Office* ❖ Gavin Arthur, *Genome British Columbia* ❖ Thor Borgford, *Twinstrand* ❖ Don Enns, *CANTEST Ltd.* ❖ Lesley Esford, *BCIT, School of Health Sciences* ❖ Dr. Rajender Kamboj, *Xenon Pharmaceuticals* ❖ Matt Lovett, *Saturn Biomedical Systems Inc.* ❖ Mathew Mintz, *BCIT, Technology Commercialization Office* ❖ Joanne Stephenson, *Response Biomedical Corporation* ❖ Dr. Paul Wright, *Burnaby General Hospital*

Workshop "D": Information Technology, Communication/Wireless, Post-secondary Research/Technology Commercialization

Justine Bizzocchi, *SFU, University Industry Liaison Office* ❖ David Brown, *Creo* ❖ Jack Gin, *Extreme CCTV Inc.* ❖ Maureen Kirkbride, *Telus* ❖ Brad Lowe, *Nokia Canada* ❖ Andrew Scott, *Digital Payment Technologies* ❖ Bruce Stevens, *Pacific Design Engineering* ❖ Don Thiel, *PMC Sierra* ❖ Paul Thiel, *BCIT, Director for Advanced IT* ❖ Sal Visca, *InfoWave/WIN BC*

Workshop "E": Film/Television, New Media, Post-secondary Research/Technology Commercialization

Brad Alden, *The Burnaby NOW* ❖ Lynda Brown, *New Media BC* ❖ Jose Dino, *Telus* ❖ Gordon Hardwick, *BC Film Commission* ❖ Ron Hrynuik, *The Bridge Studios* ❖ Cliff Jones, *Art Institute of Vancouver-Burnaby* ❖ Stan Loh, *Advanced Interactive* ❖ Shawn Mabey, *Fluid Perception* ❖ Susan Rae, *City of Burnaby* ❖ Wayne Robert, *Knowledge Network*

Workshop "F": Environmental Solutions (Land and Water), Green Buildings, Alternative Fuels, Post-secondary Research/Technology Commercialization

Elisa Campbell, *UBC, Design Centre for Sustainable Cities* ❖ Tracy Casavant, *Eco-Industrial Solutions Ltd.* ❖ Teresa Coady, *Bunting Coady Architects* ❖ Dr. Nigel Fitzpatrick, *Azure Dynamics* ❖ Chris Hartman, *UniverCity* ❖ Altaf Hussain, *BC Hydro, Strategic Asset Management* ❖ Gary Lanyon, *City of Burnaby, Environment Committee* ❖ Dr. Charles LeBlanc, *CANTEST Ltd.* ❖ Dina Matterson, *BC Hydro, Business Development and Sector Marketing* ❖ Jennie Moore, *GVRD, Strategic Initiatives* ❖ Dejan Radoicic, *Stantec* ❖ Ross Rettie, *APEG BC* ❖ Sid Siddiqui, *Keen Engineering* ❖ Coro Strandberg, *Coro Strandberg Consulting* ❖ Dr. Norman Street, *BCIT, Technology Centre*

Workshop "G": Tourism (Sports Tournament), Arts/Culture, Retail/Service

Mymee Chow, *The Heights Merchants Association* ❖ Mathew Coyne, *(2009 World Police & Fire Games) Tourism Vancouver* ❖ Nancy Duxbury, *Creative City Network* ❖ Darlene Gering, *Burnaby Board of Trade* ❖ Sev Morin, *Going for Gold, Burnaby Committee* ❖ Sheliza Mitha, *Tourism BC* ❖ Darlene Osborne, *Burnaby News Leader* ❖ Keith Rice-Jones, *Wild Rice Studio* ❖ Barbara Spitz, *Spirit of BC Community Committee*, Burnaby

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Antonia Beck, *South Burnaby Neighbourhood House Society* ❖ Corp. Fred Elder, *RCMP, Burnaby Mountain CPO* ❖ Jeanne Fike, *Burnaby Family Life Institute* ❖ Val MacDonald, *Seniors Housing Information Program (SHIP)* ❖ Susan Papadionissiou, *United Way of the Lower Mainland* ❖ Derek Pollock, *St. Leonard's Youth and Family Service Society* ❖ Patrice Pratt, *United Way of the Lower Mainland* ❖ Tanya Sather, *Burnaby Association for Community Inclusion* ❖ Janey Talbot, *Burnaby School District #41* ❖ Debbie Zurowski, Edmonds *Town Centre Business & Community Association*

Workshop "I": Residential, Commercial, Industrial, Agricultural Development

Doug Avis, *NAIOP, Development Issues Committee* ❖Lee Blanchard, *Royal-LePage Commercial Inc.* ❖ Paul Faibish, *Ledingham McAllister* ❖ Mary Cue, *Consultant* ❖ Michael Geller, *UniverCity*

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Lead Project Consultant:	Jay Wollenberg, *Coriolis Consulting*

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Table of Contents

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Related Documents

The following documents are available on-line at www.burnaby.ca/EDS2020

Wollenberg, Jay, *"Taking Stock of Burnaby's Economy: Discussion Paper for the Burnaby EDS Steering Committee Meeting #2"*, 2004

Munroe, John M., *"Burnaby's Economy in 2013: An Analysis of Trends"*, 2004

Holbrook, J. Adam, *"An Analysis of Industrial Clusters in Burnaby"*, 2004

Why an Economic Development Strategy for Burnaby?

Burnaby is already an outstanding community in which to live, learn, work, invest, and play, but ongoing efforts are needed to hold onto past achievements and make the community even better. The City has a vision to keep striving toward a Burnaby in which residents and businesses enjoy:

- A ***healthy and livable community*** with a high quality of life and wellness, connections in the community, and opportunities for the participation of all residents.
- A ***high quality physical setting*** including a clean natural environment, a lively and livable urban fabric, and a wide variety of open spaces and parks.
- A ***robust, sustainable local economy*** which provides jobs, attracts investment, and contributes to a fiscally strong local government.

These elements of community - social, physical, economic - are interrelated and cannot be treated for long in isolation from each other. Progress in one area, if it comes at the expense of another, does not necessarily make a community better. However, sometimes it is necessary to focus attention on one component to increase knowledge, identify and solve problems, and take advantage of opportunities.

Just as Burnaby has plans related to managing urban development, the transportation network, parks/recreation, housing, and social policy, this document presents the City of Burnaby's strategy for improving the local economy.

The Global Marketplace

There continues to be outstanding opportunities for sustainable, high quality economic development for municipalities with a clear vision and a smart action plan. However, the pace of business is accelerating and competition is strong from the many regions in the world that are chasing businesses, especially in the desirable technology sectors. There are also great challenges in our region with diminishing land supply, rising land values, and increasing traffic congestion. While Burnaby has been very successful, it can't afford to be complacent about its past gains. There is potential in Burnaby that has not yet been tapped. There are opportunities that will take work to realize. There are constraints that Burnaby could be working to reduce.

A Good Community Plus Pointed Work

While many of the forces that affect a community's economic base are beyond local control, the City can influence economic development patterns in a variety of ways: if the City has a clear vision of what it is trying to achieve, has a sound understanding of Burnaby's economic prospects within the regional market context, and adopts practical strategies that have a good chance of success. This is the purpose of this Strategy.

Burnaby is quite fortunate in that it now has the opportunity to move forward from a position of strength. Because of its central location in Greater Vancouver (which is one of the most attractive urban regions in the world), its already-established positions in growing sectors of the global economy, and its outstanding array of community assets, there is a momentum that ensures that Burnaby is going to attract more investment and jobs whether or not the City adopts an economic plan. This Strategy simply aims to influence that growth by: identifying the kinds of economic development that are most appropriate; finding ways to make better advantage of Burnaby's strengths; chipping away at obstacles; and helping to make sure that economic growth does not come at the expense of Burnaby's social fabric, quality of life, or environment.

Looking Back

Burnaby adopted an Economic Development Strategy in 1990. The 1990 Strategy played a key role in helping Burnaby become a stronger regional centre for education, technology, communications, film/television, tourism, good quality light industry, the arts, not-for-profits, and retail/service, while celebrating its multicultural character and maintaining its position in agriculture and heavy industry.

Changes in Burnaby's Economy from 1991 to 2006

Burnaby's economy has changed from 1990 to 2006, as have many of the factors that influence and reflect the performance of the economy. The following is a small sample of change from the time since the 1990 Burnaby EDS was adopted.

Locally

- About 35,000 (or 22%) more people lived in Burnaby, 11,000 (or 12%) more people were in the work force in Burnaby, and 14,000 (or 15%) more people worked in Burnaby 10 years later in 2001 compared to 1991.[1]
- About 43,500 (or 27%) more people lived in Burnaby 15 years later in 2005 compared to 1990 [2].
- The unemployment rate in Burnaby declined from 9.0 % in 1993 to 8.3% in 2003, a decrease of 0.7% (or 8%) over 10 years.[3]
- There continued to be more jobs than people in the labour force and jobs increased at a faster rate - the adjusted ratio was 1.2 in 2001 compared to 1.0 in 1991, 10 years earlier.[4]
- Average household income in Burnaby has remained at similar levels (expressed in 1997 dollars) - $48,300 in 2001, was slightly lower compared to $48,700 for 1991, 10 years earlier[5].
- Vancouver's annual inflation rate fell from 3.6% in 1993 to 2.1% in 2003, a net decrease of 1.5% (or 42%) over 10 years[6].

Provincially

- The total economic output of British Columbia (GDP) increased by $28 billion (or 27%); high tech GDP increased by $1.7 billion (or 85%), and tourism GDP increased by $1.0 billion (or 25%) in the 10 years from 1993 to 2003.[7]

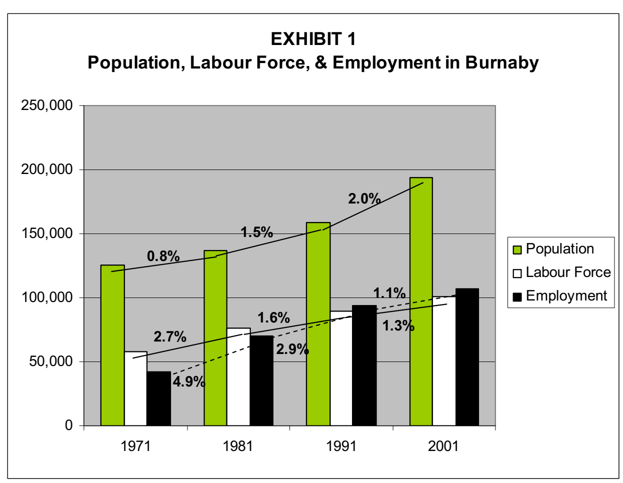
Nationally

- The exchange rate between the U.S and Canadian dollars, which was 77.53 cents in 1993, fell to the 62 cent range in 2001, then rose to 71.38 cents in 2003[8] and is presently 86.29 cents as of February 2007[9] - an 8.76 cent (or 11%) net gain over 14 years.
- The prime interest rate, which was 5.94% in 1993 had fallen to 4.69% in 2003[10] and to 4.25% as of January 2007[11] a net decrease of 1.69% (or 28%) over 14 years.

The reason for including this sample of local, provincial, and national factors is to draw attention to the reality that the fate of a municipality within a region is greatly influenced by a broad range of complex economic factors which often operate at different levels. Before moving forward, the following points highlight some recent trends in key local factors (i.e., population, labour force, employment; industries with regional competitive advantage; and development cost charges and tax rates).

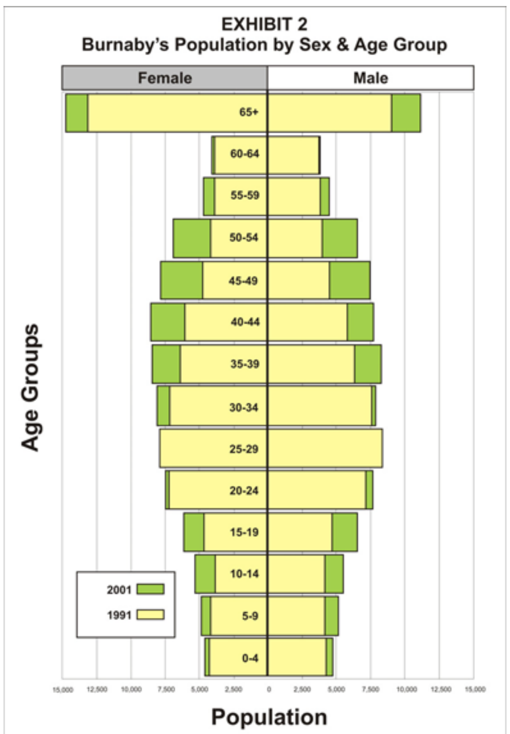
<u>Population, Labour Force, Employment (1971, 1981, 1991, 2001)</u>

Exhibit 1 shows trends in Burnaby's population, labour force, and employment over the last three decades. Burnaby has shown gains in all three indicators in each of the four decades shown. Burnaby's employment has grown at about 1.4% per year from 1991 to 2001 and remained at about 11% of total regional jobs through the last four decades.



The ratio of people working to jobs available within the city (labour force divided by employment) shifted from 0.7 in 1971 to 1.2 in 2001. This demonstrates that employment growth within Burnaby increased at a faster rate than labour force in each of the four decades shown in **Exhibit 1**.

<u>Burnaby's Population is Aging</u>



Burnaby's population increased by about 35,000 in the 10 years between 1991 and 2001. **Exhibit 2** shows the change in population from 1991 to 2001 by age group. 1991 is shown in yellow and the growth to 2001 is shown in green. This graph lists age groups from youngest at the bottom to oldest at the top. It also shows the female population on the left and the male population on the right.

In the 10 years from 1991 to 2001 all age groups increased, with the exception of 25-29 years of age. Although pre-school and school age children (ages 0 through 14) showed increases, the largest increases were in the working years (ages 15 through 65) with the largest increase of almost 6,000 people occurring in age group 45 to 49.

These Burnaby population trends are generally consistent with regional population trends over the same 10 year period.

Employment by Detailed Industry (1991 & 2001)

Exhibit 3 shows Burnaby's change in employment by industry type for those industries with a net gain during the 10 year period from 1991 to 2001:

- *Information and cultural industries* accounted for the largest increase of about 4,100 jobs (or 3.8% of total 2001 employment).
- *Administrative support* followed with about 3,400 jobs (or 3.2%).
- *Professional/scientific/technical* were next with about 2,900 jobs (or 2.7%).
- Six of the other eight industrial groups all have more than 1,000 jobs added (or more than 1.2%).[12]

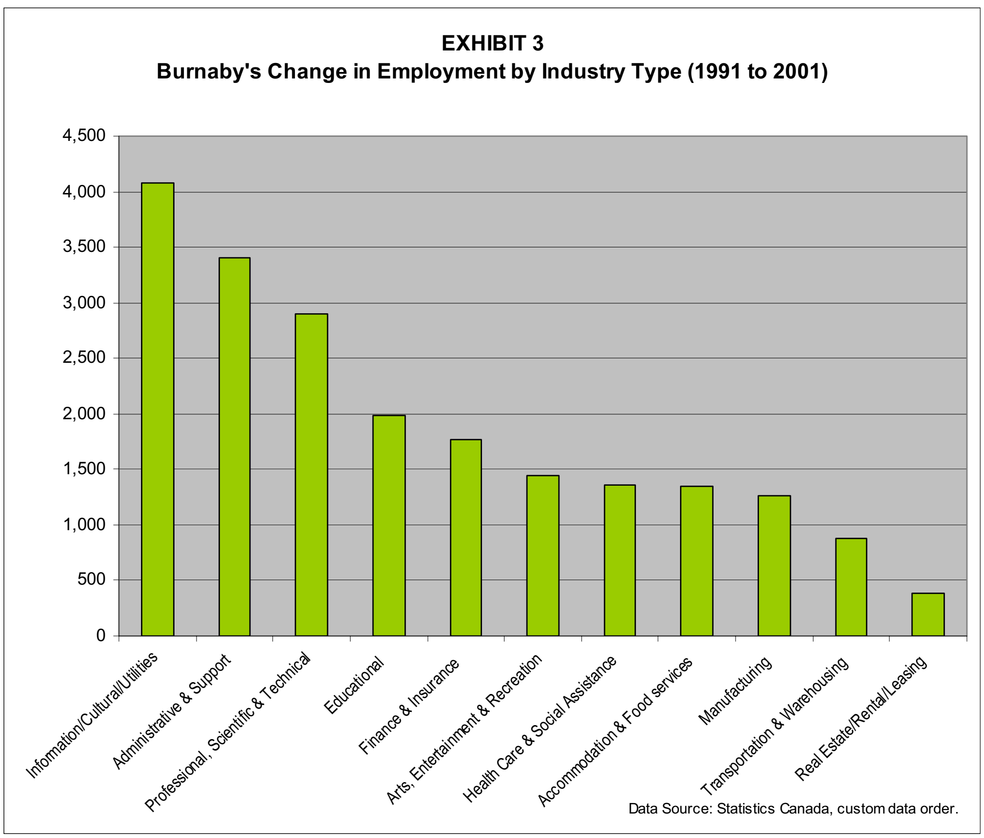
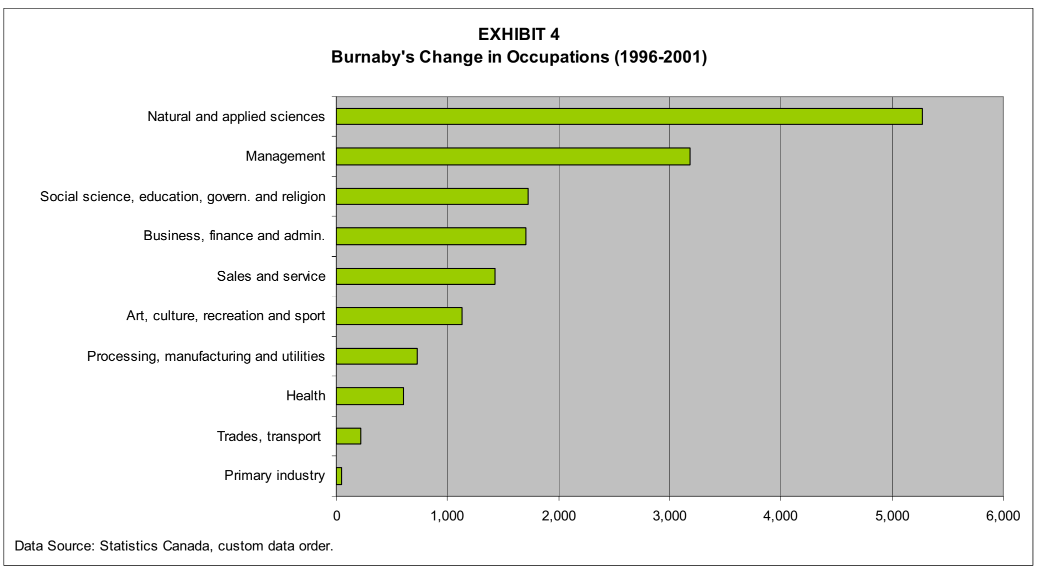


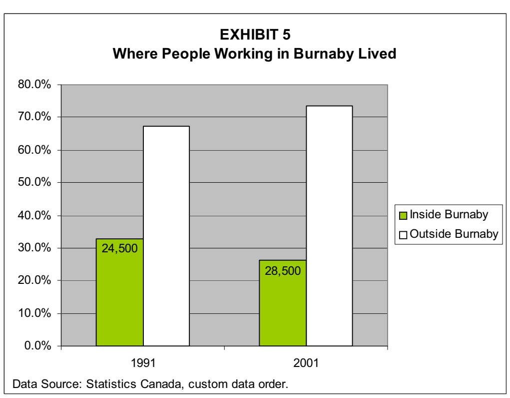
Exhibit 4 shows the change in occupations in Burnaby over the five years (1996 to 2001):

- Occupations related to natural and applied science gained over 5,200 jobs (or 4.9% of the 2001 total employment).
- Management gained over 3,100 jobs (or 3.0%).
- The remaining eight categories each represent less than 2,000 jobs (or 1.6%).

It is interesting to note that five of the six occupations with the largest net gains in employment are involved in knowledge-based industries.



Place of Residence of Burnaby Employees (1991 & 2001)

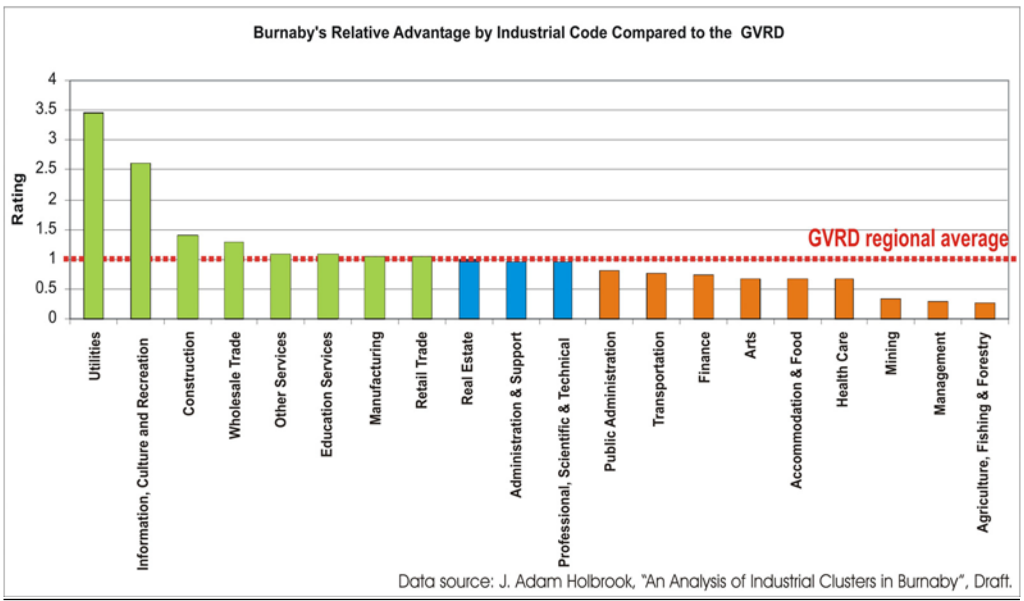


The total number of people working in Burnaby who also live in Burnaby increased from about 24,500 to about 28,500 in the 10 year period from 1991 to 2001. When expressed as a percentage, as shown in **Exhibit 5**, the percentage decreased from 32.7% in 1991 to 26.4% in 2001.

Industries with Regional Competitive Advantage

Exhibit 6 shows the business clusters in which Burnaby is relatively strong or relatively weak compared to the Greater Vancouver Regional District (GVRD) on average. In **Exhibit 6**, a value less than 1 means that this sector is under-represented in Burnaby. A value greater than 1 indicates that this sector is concentrated or clustered, suggesting that Burnaby has a competitive advantage in attracting this type of business.

EXHIBIT 6



As shown in **Exhibit 6**, Burnaby has above-average strength in utilities, information/culture/recreation, construction, wholesale trade, other services, education services, manufacturing, and retail trade. Burnaby is at or near the regional average in real estate, administration/support, and professional/scientific/technical. Burnaby is well below average in public administration, transportation, finance, arts, accommodation/food, health care, mining, management, and agriculture/fishing/forestry.

Distribution of Occupations and Industries with Regional Competitive Advantage

Exhibit 7 (on the next page) shows the distribution of industries and occupations within Burnaby that were found to have regional advantage.

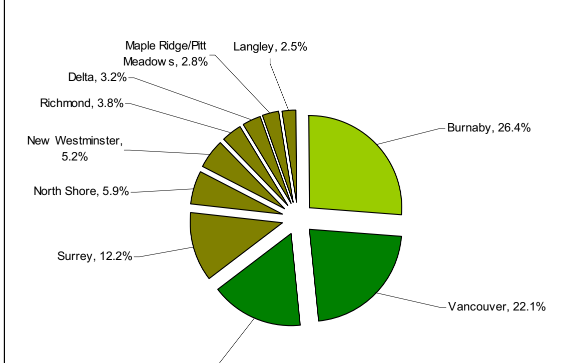


EXHIBIT 8 - Place of Residence of Burnaby Employees*

Data Source: Statistics Canada, custom order
* Note: excludes those living outside the GVRD

EXHIBIT 9
Comparison of Burnaby's Employment and Labour Force, 2001

	Employment	Labour Force	Labour Force "Surplus" or "Deficit"
Accommodation & Food Services	5,940	7,795	1,855
Construction	3,410	5,190	1,780
Health Care & Social Assistance	6,890	8,575	1,685
Professional, Scientific, Technical Services	7,360	9,030	1,670
Administration & Support Services	3,065	4,400	1,335
Finance & Insurance	4,285	5,220	935
Arts, Entertainment & Recreation	1,260	1,865	605
Transportation & Warehousing	4,680	5,150	470
Other Sectors	305	770	465
Public administration	3,985	4,075	90
Real Estate, Rental, Leasing	2,020	2,075	55
Other services	5,435	5,230	-205
Wholesale Trade	7,215	5,550	-1,665
Educational Services	8,355	6,615	-1,740
Utilities	2,500	745	-1,755
Retail Trade	13,030	11,110	-1,920
Manufacturing	11,440	9,245	-2,195
Information & Cultural Industries	10,655	5,170	-5,485
Total	101,830	97,810	-4,020

Data Source: John M. Munro, "Burnaby's Economy in 2013: An Analysis of Trends", 16 Aug 2004 Draft

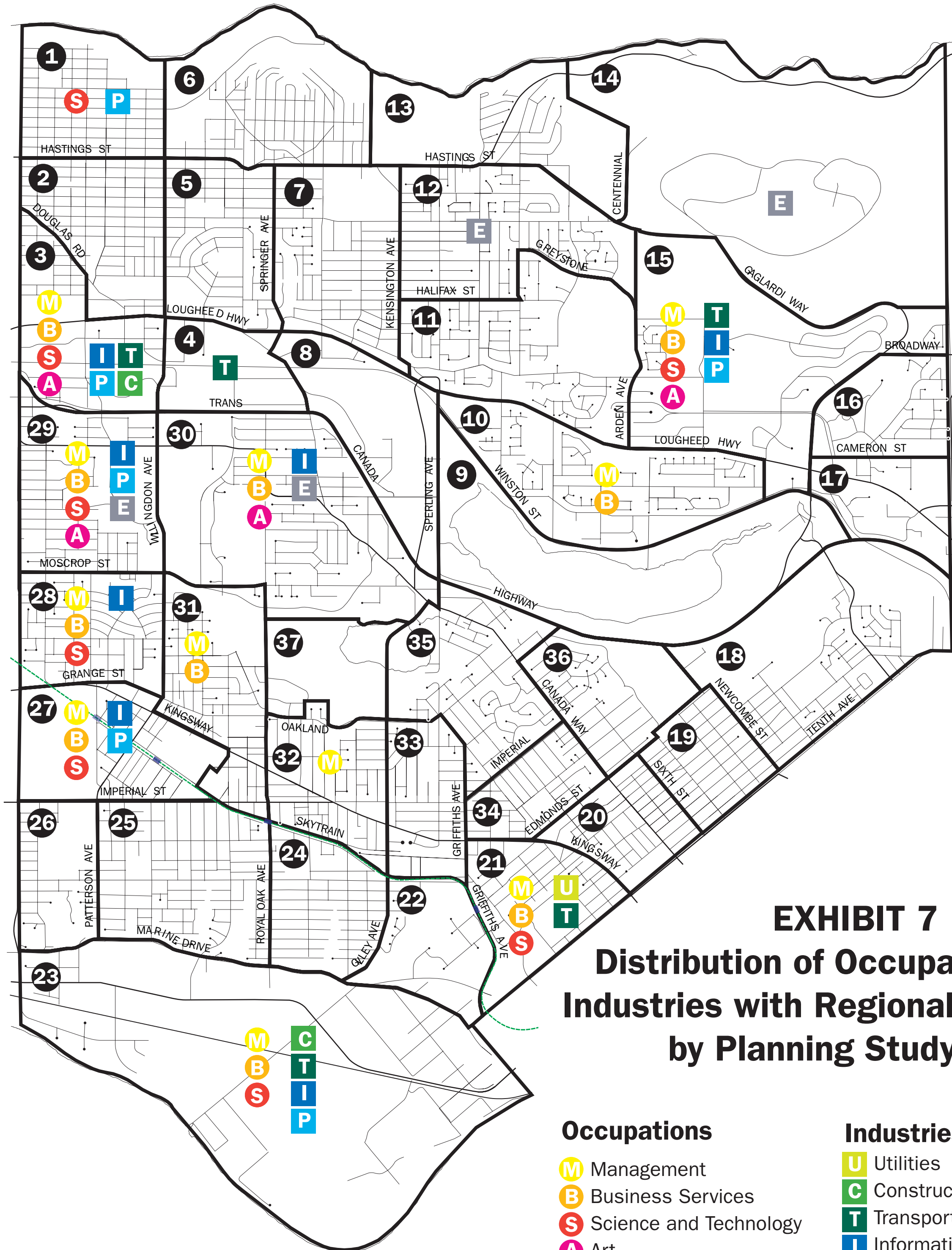
Where People Who Work in Burnaby Live

Exhibit 8 shows the place of residence of people who work in Burnaby. The chart shows that only 26% of the people who live in Burnaby actually work in Burnaby (excluding people who work at home). About 64% live on the Burrard Peninsula and therefore need not cross a bridge to reach Burnaby to travel to work.

Burnaby's Employment and Labour Force

Exhibit 9 shows a comparison of Burnaby's labour force (i.e., employed people who live in Burnaby) with Burnaby's employment (i.e., jobs located in Burnaby).

Exhibit 9 also shows that, while total resident labour force and total employment are nearly balanced, many non-Burnaby residents come to Burnaby to work and many Burnaby residents leave the community for jobs elsewhere.



Planning Study Areas

1 Burnaby Heights
2 Willingdon Heights
3 West Central Valley
4 Dawson - Delta
5 Brentwood
6 Capitol Hill
7 Parkcrest - Aubrey
8 Ardingley - Sprott
9 Burnaby Lake
10 Government Road
11 Sperling - Broadway
12 Lochdale
13 Westridge
14 Burnaby Mountain
15 Lake City
16 Lyndhurst
17 Cameron
18 Cariboo - Armstrong
19 Second Street
20 Edmonds
21 Stride Avenue
22 Stride Hill
23 Big Bend
24 Clinton - Glenwood
25 Sussex - Nelson
26 Suncrest
27 Maywood
28 Garden Village
29 Cascade - Schou
30 Douglas - Gilpin
31 Marlborough
32 Windsor
33 Kingsway - Beresford
34 Richmond Park
35 Morley - Buckingham
36 Lakeview - Mayfield
37 Oakalla

EXHIBIT 7
Distribution of Occupations and Industries with Regional Advantage by Planning Study Area

Occupations

- M Management
- B Business Services
- S Science and Technology
- A Art

Industries

- U Utilities
- C Construction
- T Transportation
- I Information and Culture
- P Professional and Scientific Services
- E Educational Services

37 Planning Study Area

City of Burnaby

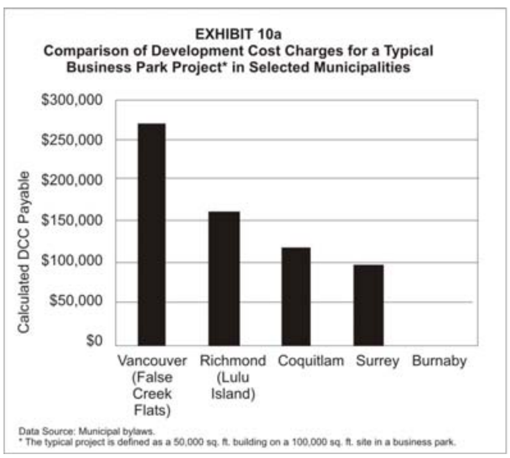
PLANNING & BUILDING DEPT
2006 03

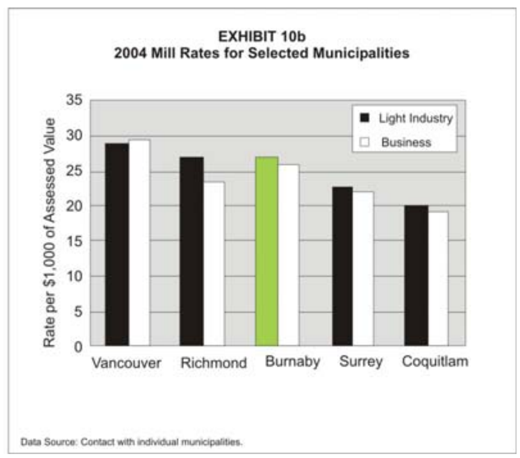
Source: Adam Holbrook, “An Analysis of Industrial Clusters in Burnaby”

There are particularly large imports in information/culture, manufacturing, retail trade, utilities, educational services, and wholesale trade. Conversely, Burnaby exports many workers in the accommodation/food, construction, health care/social assistance, professional/scientific/technical, and administration/support sectors.

Development Cost Charges and Tax Rates

Burnaby's development approvals processes and development costs do not appear to be a significant constraint on Burnaby's attractiveness. **Exhibit 10a** shows Burnaby's estimated Development Cost Charges for a typical industrial project are the lowest of the selected communities in Greater Vancouver. **Exhibit 10b** shows Burnaby's mill rates for light industrial and business taxes are competitive with the same selected communities.





ADVANCING FROM A POSITION OF STRENGTH

From a Position of Strength

As shown by this selection of comparisons, Burnaby has made significant strides since the 1990 Burnaby EDS was adopted – moving from footholds in certain industries to a point of having a demonstrated regional advantage in a number of areas; capturing a large share of total regional employment; and achieving a leading role in sectors of the economy that match Burnaby's vision for a sustainable, healthy community.

This growth is due in part to Burnaby's decision in 1990 to adopt an Economic Development Strategy that identified specific ways in which the City could do its part in the creation of a strong local economy.   It is from this position of strength that this strategy will focus on the next steps required to move forward.

Much has changed since 1990. The 1990 Strategy has run its course. Much of the planned work has been completed, many of the objectives have been achieved and, perhaps most importantly, Burnaby and Greater Vancouver are very different places with new challenges and new opportunities.

It is time for an updated look at Burnaby's economic development prospects, a new articulation of Burnaby's vision for the future, and a new action plan.

Looking Ahead

This Economic Development Strategy describes Burnaby's vision for its local economy over the next fifteen or so years and outlines the actions the City and others can take to achieve this vision.

This Strategy reflects Burnaby's basic attitude about economic growth: the local economy can be improved in ways that will enhance the quality of life, provide ongoing sustainable benefits (including jobs, investment opportunities, and tax base) for all members of the community, avoid environmental degradation, and make wise use of limited resources including land.

Process

Many hands contributed to the drafting of this Economic Development Strategy. City Council appointed a diverse and knowledgeable Steering Committee comprised of representatives of all sectors of the economy as well as people with social and environmental perspectives. A list of Steering Committee members is located in the ***Acknowledgements*** section of this report.

This Steering Committee guided the work of staff and consultants and also directed the creation of nine Sub-committees that completed detailed work on specific aspects of the economy and community that were identified as having growth prospects particularly appropriate to Burnaby.

The main technical steps in the work included:

- Analysis of Burnaby's economic base and prospects. This work is *attached* to this report as appendices (Taking Stock Discussion Paper, Trend Analysis, Cluster Analysis). All three of these documents are available on-line at www.burnaby.ca/EDS2020 .
- Development of broad goals and principles for economic development.
- Selection of key sectors for detailed work.
- Updating the Strategy document.

The City also ensured that there were opportunities for consultation with the broader business community and the general public at two points in the process – the formation of broad goals, principles, and key sectors; and the release of the draft Burnaby EDS 2020.

The Vision for Burnaby

Throughout Burnaby's Official Community Plan and the 1990 Economic Development Strategy there is a consistent message about the kind of community Burnaby should be:

- A healthy, safe, diverse, livable community that is welcoming to new residents.
- A clean natural environment.
- A vibrant urban place.
- A sustainable, inclusive, prosperous economy that is welcoming to new businesses.
- A fiscally sound local government.

The Official Community Plan calls for "…a more complete community, an environmentally aware community, a community of economic opportunity, a community with increased transportation choice, an involved community, and a community within a livable region".

*Smart, prosperous, sustainable…*this is Burnaby's vision for the future of its local economy. Smart in the sense of an intelligent, practical approach to encouraging economic growth that contributes to a strong community; prosperous in the sense of creating economic opportunity for business and citizens; sustainable in the sense that growth is consistent with Burnaby's goals for quality of environment, community, and life.

Expanding on this vision, the goals of this Economic Development Strategy are to:

1. *Maintain and increase the diversity of the local economy*, in order to be economically robust, to contribute to social diversity, and to maximize the range of employment opportunities available in a wide variety of sectors and a wide variety of occupations.
2. *Increase the total number of jobs and total investment in Burnaby* by attracting businesses that are appropriate to Burnaby in economic, social, and environmental terms.
3. *Increase the quality and sophistication of the local economy*, with increased numbers of permanent, high skill, high income jobs.
4. *Influence growth and change in the local economy* so that it contributes to the quality of life and the quality of the environment.

Measurable Targets?

The question of whether to try to translate broad goal statements like these into hard, measurable targets is worth exploring. There is an obvious attraction to try to quantify goals (how much growth? what measures of diversity?) to provide a tangible target to reach and a means of measuring progress. The problem is that the economic fate of one municipality within a large metropolitan region is determined by many factors on different levels (global, national, provincial, and regional), almost all of which are outside municipal control.[13] If we imagine Burnaby to be a sailboat, the economic forces outside of our control would be the wind. Although we can not control the wind, we can set a course and trim the sails to respond to the changing wind conditions.

The Aim

The aim of this Economic Development Strategy, therefore, is simple: set out action plans that will have a positive influence on Burnaby's economic future and make things better than they would be without such a strategy. The Strategy can be considered directional ("we want to go this way") rather than quantitative in its objectives. This does not mean that monitoring progress is not important. The Strategy includes specific suggestions for regular pulse-taking to see what is changing and to see if efforts appear to be having results. Monitoring will confirm whether Burnaby is heading in the desired direction and allow for course corrections along the way, if required.

Strength in Diversity

In a similar vein, it is worth exploring whether or not the Strategy should focus on only one or two economic sectors of promise. Certainly, the prospects for being effective can be diminished if efforts are spread too thinly or applied to sectors of the economy with little potential in Burnaby. On the other hand, concentrating on a niche, even one with high growth potential and for which Burnaby is uniquely suited, courts the risk of all the eggs being in one basket. This Strategy does not aim to pick one winning sector; rather it aims to foster all sectors that have potential in Burnaby with perhaps a little more attention on those that have the strongest potential over the next decade or two.

Achieving the Vision

The vision and the goals are words that are easy to say. Burnaby intends to turn these ideas to deeds, so this Strategy is pragmatic. Its primary purpose is to set out specific actions that can make a difference.

Two main steps are needed to go from good-sounding goals to effective action:

1. Understand Burnaby's role and prospects within the metropolitan context and select priorities for economic development that are within Burnaby's reach and consistent with Burnaby's vision.
2. Figure out what it takes to make Burnaby attractive to desirable economic growth and develop strategies that are practical, within Burnaby's means, and likely to be successful.

These steps are the heart of this Strategy.

Regional Strengths

Greater Vancouver has a broad array of economic advantages, especially for businesses in what is called the "new economy". The region has:

- Economic diversity, which is attractive because it is more stable than reliance on one or two sectors.
- A strategic location on the North American coast of the Pacific Rim.
- Good quality infrastructure for air, sea, rail, and road transportation.
- High quality public services and institutions, including post-secondary education.
- Abundant, reliable, good quality sources of energy and water.
- High quality natural environment, communities, and amenities.
- Strong financial institutions.
- Strong international connections, culturally, linguistically, and financially.
- Highly skilled labour.
- Established clusters in growing sectors including film/television, information technology, communications, and biotechnology.
- Outstanding tourism draws.
- A stable system of laws and government.

Burnaby's Strengths

Greater Vancouver's assets make the region a strong candidate for continued economic and population growth. Within this regional context, Burnaby is well-positioned to be one of the preferred locations for business growth, because it has the following strengths:

Economic

- A geographically central location with good vehicular access to all sub-regions of the metropolitan area and rapid transit links to other key regional centres and each of its four developing town centres.
- Established clusters in growing sectors such as technology, utilities, film/television, and regional headquarters.
- Proximity to the downtown Vancouver hub.
- Better access to the international airport compared to most suburban municipalities.
- A strong municipal fiscal situation, with no debt.
- Competitive property tax rates and development approval costs.

Social

- High livability, and a diverse stock of housing.
- Good quality public education and health services.
- An exceptional continuum of post-secondary institutions including Simon Fraser University (SFU), British Columbia Institute of Technology (BCIT), Art Institute of Vancouver-Burnaby, and University of Phoenix (Burnaby campus).
- A skilled, diverse labour force.
- A diverse, multicultural community that is able to connect with many new immigrants looking for places to live and establish businesses.

Environmental

- High quality protected natural environment including Burnaby Mountain, rivers, lakes, and ocean front beaches.
- A significant amount of green space - 25% of the City is open space and park.
- A regional leader - recipient of numerous environmental awards for individual programs and overall sustainability.

Burnaby has also had a history of strong, policy based development and used a persistent, yet patient approach to realizing long term plans. This has made a significant contribution to a sense of certainty.

Consequently, Burnaby is well-positioned to continue to attract a strong share of regional employment growth.

Burnaby's Prospects

Based on a detailed analysis of the structure and trajectory of the metropolitan economy, and Burnaby's competitive advantages and disadvantages within the region (see the series of separate supporting reports at www.burnaby.ca/EDS 2020 for more detail), the sectors that make up Burnaby's economic base can be divided into three broad categories based on prospects for growth over the next decade or so:

1. Clusters with *strong prospects for growth*:
   - Information technology, communications/wireless.
   - Biotechnology, health, life science.
   - Film, television, digital entertainment, new media.
   - Education.
   - Environmental technology, services.
   - Tourism, including sport/tournaments, arts/culture, retail.
   - Finance, management, professional services.

2. Sectors with *modest prospects for growth*:
   - Light industry, including warehousing/distribution, light manufacturing.

3. Sectors with *a stable outlook*:
   - Heavy industry.
   - Agriculture.
   - Not-for-Profit.

Burnaby already has a solid base in all of these sectors and all contribute to making Burnaby's local economy diverse. The Strategy, therefore, includes actions aimed at each of them.

Challenges

The background analysis also points out some potential challenges or obstacles that have the potential to frustrate Burnaby's prospects or even lead to sectoral decline.

Some of these obstacles have emerged during the last decade and are the consequences of regional growth and development patterns.

The main challenges are:

- *Land supply and land cost*.
  Burnaby's supply of vacant land for commercial and industrial development is dwindling. This is a good news/bad news story: the decline means that land has been taken up by new development which involves investment and job creation, but it also means that there is a diminishing ability to accommodate new development. Reduced supply in the face of strong regional demand means that land prices are rising, so some kinds of business that would historically have chosen Burnaby will seek locations elsewhere. Therefore, a greater emphasis on redevelopment of lower intensity land uses will likely be required.

- *Regional transportation*.
  Although Burnaby has outstanding rapid transit links within the region, the movement of goods and people is still dominated by vehicles.

  Historically, Burnaby enjoyed strong growth in light industry (especially warehousing and distribution) and some kinds of region-serving office uses because it offered a high level of access to the regional highway network. The roads are still there, but congestion has diminished Burnaby's true accessibility. Combined with the pressure of increasing land values, traffic problems have led to a shift in warehousing/ distribution and light manufacturing growth east to the Fraser Valley. Burnaby risks losing some existing types of warehousing and distribution jobs, and potentially not being able to attract new ones, if traffic congestion is not addressed.

- *Vague image*.
  The regional brand-name is Vancouver. All other communities are, to some extent, in Vancouver's shadow. There are advantages to this, as "Vancouver" has well-established international recognition and cachet, but it means that the suburban communities are viewed somewhat indiscriminately as "the rest of the region". Capturing a higher market share of regional growth depends in part on the marketplace knowing where to look, so it is important that businesses know where Burnaby is and what it has to offer relative to other suburban communities.

- *Vanilla urban character*.
  Burnaby is eminently livable, with attractive neighbourhoods, many parks, great community amenities, tidy business parks, and good infrastructure. However, Burnaby does not have pockets of diverse urban character that match districts such as Yaletown or Kitsilano in Vancouver.

  Over the last 20 years or so, Burnaby's main draw for some sectors (such as technology) has been readily available vacant land (and low occupancy costs) with high vehicular accessibility and regional centrality. Now, some of the lustre is off these assets and Burnaby finds itself having to compete more to attract some kinds of businesses, which themselves are becoming more mature in their site selection process.

  Many firms now consider new criteria including housing within walking distance, high quality amenities, lively commercial space, and all-day urban character. Burnaby has tended to develop large concentrations of employment in areas that are functional, but perhaps dull. Even Metrotown does not yet have the sort of urban character that pulls firms looking for diversity, and provides a hotbed for small retailers, restaurants, or start-ups.

- *Mixed messages about being "business-friendly".*
  Burnaby wants to be seen as a business-friendly community, but mostly for the kinds of businesses that Burnaby wants to attract. This is a difficult balancing act that risks a negative reputation.

Representatives of the development community and the light industrial sector have suggested that Burnaby is not always the easiest place to do business in the region, in part because of approvals processes that can be perceived as being demanding and tedious by those not familiar with them.

On the other hand, Burnaby has benefited from paying attention to the quality of urban development and being consistent in its planning and development decision-making. There is a need to find ways to be more efficient, faster, and more flexible without sacrificing standards.

- *Maintaining the quality of the social services platform on which the community is built.* There is a concern that erosion in health care, education, support services for immigrants, public safety, and affordable housing are making all communities less attractive. This is not unique to Burnaby, as most of these elements are provincial responsibilities. It is in Burnaby's interest, though, to make sure the quality of community services in Burnaby remains as high as possible.

Summary

The sectors that have the greatest potential for growth in Burnaby tend to share two important characteristics:

- They are consistent with Burnaby's values regarding sustainability and quality of life, as they tend to be in the "new economy" or based on tourism and, therefore, have low environmental impact and a diversity of job opportunities.

- They are mobile, highly amenity-oriented, dependent on skilled labour, and are highly desired by virtually every industrialized city. Competition is strong, although Greater Vancouver is fortunately well-positioned at the global scale to attract these firms.

Burnaby's challenge is to be a preferred location within Greater Vancouver for this type of growth so that Burnaby maintains or exceeds its historic share of employment growth and associated investment. The basic pre-requisite for success is to be an attractive, livable, urban, green, business-friendly, educated, healthy, safe community with a good transportation network, an efficiently used land supply, strong social services, excellent amenities, and diverse housing. Again, words that are easy to say, but that are the key to the kind of growth Burnaby wants. There was a time when it would have been enough to offer a strategic central location, high accessibility, and readily developable land. These are still important, but they are no longer sufficient to build the kind of economic base that Burnaby strives for.

Overview - Three Sections

The Economic Development Strategy has three main sections:

- A component that is "community wide" and contains some ***overarching themes*** intended to make Burnaby a preferred location for business growth in all of the desired sectors. This part of the Strategy helps improve the platform on which economic development occurs.
- A component that is targeted at ***individual or groups of sectors*** which make up the local economy. This part of the strategy suggests specific actions for each individual sector or groups of sectors and building synergies between the groups of sectors.
- A component that outlines steps to ***monitor progress*** and the timing for updating the Strategy.

Some of these actions are very specific and can be readily implemented. Others may seem at first to be more undefined, calling for more thinking or collaboration en route to developing more specific plans. This is because this Strategy does not purport to have all of the answers. In many cases, the Strategy simply identifies areas of promise that are worth exploring.

A Sustainable Strategy

The Strategy is focused on actions the City of Burnaby can take to further the community's economic health.

As economic health is also dependent on social and environmental health, some of the themes extend beyond the economic realm of "prosperity" to touch on the environmental health of the "planet" and the City, and the social well being of the "people" within the community. These environmental and social considerations are presented in the context of bolstering economic health of the City.

Building on Past Successes

Parts of the Strategy are meant to challenge the City, the business community, SFU, BCIT, and major community stakeholders. This is to encourage Burnaby to collectively build on its past successes, to become more than the sum of its parts.

The presence of world-stage corporate players in technology, two high quality post secondary institutions, two rapid transit lines, strong sector clusters in industries with high-potential (e.g., technology, and film/television), and an outstanding array of amenities ought to be capable of more synergy. These elements can, and should, do so much more than share space in the same municipality; they represent untapped opportunities for Burnaby beyond what has been achieved so far.

Partnerships Will be Required

Many of these actions call for collaboration with others, including business, educational institutions, the Burnaby Board of Trade, Tourism Burnaby, TransLink, GVRD, and the Province.

General Strategies

General Strategies (G)

This part of the Strategy identifies the following 11 themes for enhancing Burnaby's attractiveness to residents and businesses. These overarching themes are not sector specific; they aim to make Burnaby a preferred location in Greater Vancouver for businesses in all of the sectors of interest (with the last two having the common theme of regional integration).

Building a Better Burnaby

- G1: building a strong, livable, healthy community
- G2: making efficient use of land
- G3: creating urban character
- G4: striving for a greener community
- G5: marketing Burnaby as a premier business location
- G6: fielding the right economic development team
- G7: cultivating a "business friendly" reputation
- G8: nurturing a strong, diverse, welcoming, caring society
- G9: working with the Burnaby Board of Trade, Tourism Burnaby

Regional Integration

- G10: cooperating regionally
- G11: making progress on regional transportation

It should also be noted that each of these themes has significant overlap with all three of the "pillars" of sustainability - advancing *prosperity* (economic pillar), engaging *people* (social pillar), and regenerating a *healthier planet* (environmental).

Each general strategy contains:

1. a ***theme***,
2. ***objective(s)***,
3. ***progress to date***, and
4. an ***action plan***.

For each element of the action plan, a gauge or "odometer" is used to provide the current status at a glance (new task, started, on our way, well on our way, or task completed).

The example above shows we are "on our way". In this case, the direction (policy, program, or plan) may be already in place, but may not be fully realized (e.g., The Holdom Area Guide plan is approved, but the future vision described in the guide plan – a compact mixed use neighbourhood adjacent to an existing SkyTrain station – is under development but has yet to be realized).

G1 Building a Strong, Liveable, Healthy Community

Theme

Reinforcing the community development policies within the Burnaby Official Community Plan (OCP) which focus on community-building, will also contribute to making Burnaby an attractive location for business. By maintaining and enhancing local quality of life, skilled residents, including immigrants and entrepreneurs, should continue to relocate to Burnaby. The presence of skilled workers will in turn attract businesses looking for qualified employees.

Objective

The Burnaby OCP envisions a more vibrant, complete community, an environmentally aware community, a community of economic opportunity, a community with increased transportation choice, an involved community and a community within a livable region.

Progress to Date

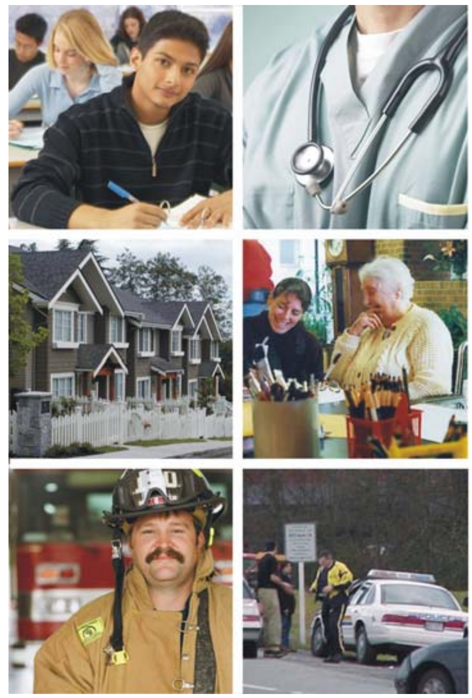
To a large degree, the growth management approach outlined in the Burnaby OCP is already well underway.

- The City will continue to ***protect*** Burnaby's major open space and other amenity areas, and at the same time, ***offer economic opportunities*** in relation to existing and emerging needs.

- The City will pursue the development of a more complete community that ***brings people, jobs, services and amenities together*** in more accessible ways.
- The City will also continue to ***involve the citizens*** of Burnaby in the ongoing planning of the City that adds to its livability, as well as that of the Region as a whole.

Building a Strong, Liveable, Healthy Community

G1 Building a Strong, Liveable, Healthy Community



EDS Focus

Within the context of the Burnaby EDS 2020, a number of elements (or economic development levers) are contained within the general quality of life envisioned within the Burnaby OCP. These economic development levers include:

1. A strong *public education* system.
2. A locally accessible continuum of *health care services*.
3. A *safe community*.
4. A complete network of *social services*.
5. A diverse and affordable *housing stock* which is appropriate to resident's needs.

Action Plan

To advance these quality of life elements as economic development levers the City will undertake the following actions:

1. Public Education/Public Health
   Continue to work with the School District and with local/regional health authorities to find ways in which the City can help them in their efforts to maintain/improve funding, programs, services, and facilities in Burnaby.

2. Community Safety
   Continue to work with the police to decrease crime and increase the confidence of residents and businesses that Burnaby is a safe community.

3. Community Facilities
   Continue to invest in parks, community facilities, recreation facilities, and arts/culture.

4. Housing
   Use the tools available to local government to achieve diversity and affordability in the housing stock, within the limits imposed by Burnaby's attractive location in a strong regional housing market. Actions will continue to include:

a) *High Density Housing*
   Continue planning for high density neighbourhoods in appropriate locations, as higher density housing tends to be more affordable and more likely to appeal to a wide variety of target markets.

b) *Walkable Neighbourhoods*
   Consider introducing residential and local serving commercial into areas of concentrated employment (e.g., Canada Way/Willingdon and/or Big Bend), so that there is more mixed use and vitality in employment areas.

c) *Transit Oriented Housing*
   Continue locating high density housing at transit stations (On the Expo SkyTrain line the Edmonds Town Centre, Lougheed Town Centre, Metrotown (including Patterson Station), Royal Oak Community Plans are all in place. On the Millennium SkyTrain line Brentwood Town Centre, Holdom Station Area, Lake City Guide, Lougheed Town Centre Plans are all in place, while the Sperling/Bainbridge and Brighton Urban Village Plans are pending).

d) *Senior Government Assistance*
Look for opportunities to work with the Provincial and Federal governments to make programs and resources available for affordable housing projects.

e) *Maximum Densities*
Examine whether Burnaby should consider increasing its maximum residential densities in some locations to allow for more intensive development and increases to the supply of housing.

f) *Non-market Housing*
Explore possible ways to use the rezoning of land for market residential development as a means of helping achieve more non-market housing.

G2 Making Efficient Use of Land

Theme

Burnaby's inventory of vacant developable land is declining, as is the case in most of the GVRD.

Objective

In the future, Burnaby will only be able to accommodate employment growth if there is densification of the existing inventory of commercial and industrial land.

Progress to Date

The current OCP reflects the desire to take advantage of rapid transit service and to aim for a balance of population and employment growth that tries to minimize overall transportation demand. However, businesses in the economic sectors that Burnaby most wants to further encourage tend to be benign neighbours, so there is less need for rigid separation in land use than has historically been planned in Burnaby. Employment-accommodating lands that are anticipated to transition to housing should perhaps not become 100% residential.

Action Plan

To make efficient use of land the City will:

1. <u>Industrial Density</u>

   Review the Official Community Plan (OCP) and Zoning Bylaw to:

a) *Infill*
   Look for opportunities to refine policies and regulations so as to encourage infill and redevelopment at higher minimum densities, particularly in industrial parks, business parks, and older industrial sites.

b) *Regulations*
   Examine regulations related to site coverage, setbacks, parking requirements, and maximum density to ensure that efficient employment density can be obtained in commercial and industrial areas.

2. <u>Remaining Inventory of Vacant Industrial Land</u>

   Review the OCP and zoning designations on the remaining inventory of vacant industrial land:

a) *Uses Allowed*
   Continue removing any allowable uses that have unacceptably low density of employment.

G2 Making Efficient Use of Land

b) *Intensive Employment*
Forego short term market opportunities for uses that involve extensive storage with little employment in order to preserve these lands for uses that accommodate more jobs.

3. Older Industrial Areas

Review the OCP's policies regarding the anticipated transition of some older industrial areas to residential use.

a) *Replacement Employment*
Consider guiding transitions so that mixed use, higher density development includes room for "replacement" employment as well as new housing. This replacement employment may not, necessarily, be in the same economic sector as the previous land use, but it will help Burnaby maintain its capacity to accommodate jobs.

G3 Creating Urban Character

Theme

Urban character means more than high density and tall buildings; it also means a high quality pedestrian realm, a lively mix of uses, a diversity of architectural styles, an active street life, bustle, entertainment, and even some grit.


Courtesy of Larry Wright/BurnabyNOW

Objective

Burnaby must continue to evolve into a mature, lively, post-suburban city if it wants to maximize its ability to attract a diverse, well-educated, skilled population and attract the kinds of firms that hire these people.

Progress to Date

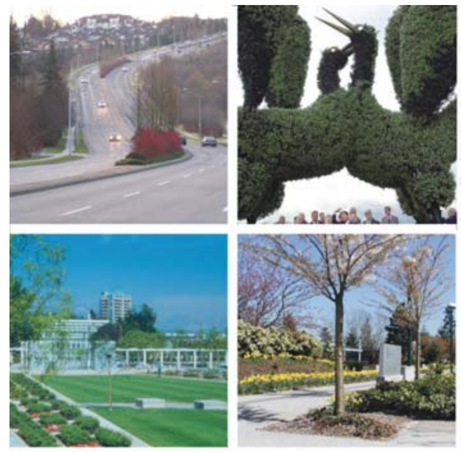
Much of Burnaby's urban development over the last decade or so could be described as having rigid separation of land uses, a kind of suburban campus flavour even in town centre locations, and a fairly narrow palette of architectural styles. And, while Burnaby has invested heavily in parks and recreation facilities, it has not put a priority on creating attractive streetscapes in all areas.

A good example of both points is the area around Willingdon and Canada Way. This location is at the centre of an enormous concentration of employment (and students), has a high level of bus service[14], and has very high vehicle volumes. It could be an exciting, mixed use urban node and it could make a highly visible statement about Burnaby's pride in the public realm.

Creating Urban Character

There has been a long standing desire to continue to beautify Burnaby as demonstrated by many successful projects pursued to date:

- the centre medians on Royal Oak Avenue, and Cariboo Road;
- Burnaby Eco-sculptures[15] and floral display gardens[16];
- Metrotown Civic Square; and
- the recently renovated City Hall Complex.



Beyond these high profile projects, however, there is a need for an overall beautification strategy to ensure that future projects, particularly in Town Centres, are designed and maintained to contribute toward the larger goal of creating an integrated high quality, visually pleasing environment for Burnaby as a whole.

Burnaby is at a pivotal point in its development with substantial development occurring in all of the town centres. Developments are achieving a high level of design and landscaping. In contrast, some public frontages have suffered.

The beautification strategy now being developed for the City includes a review of how landscaped areas are designed, built, and maintained. The output from this review should help determine how we can ensure that their value to the community increases over time.

G3 Creating Urban Character

The solution may be to apply the same approach to beautification that Burnaby applies to so many other areas - investing in beautification in a way that appreciates in value and becomes an asset to the community.

Action Plan

Fortunately, there are opportunities to build on existing strengths to create districts with more urban personality.

The City will undertake the following actions:

1. Shopping Districts
   Continue to work with local merchant groups, property owners, and developers to maintain and enhance the character of existing interesting shopping districts such as The Heights and Edmonds. This could include using ethnic themes as a means of creating diversity.

2. Urban Villages
   Ensure that the OCP update explores opportunities to find ways to transform large, single-use employment districts (business centres) into more lively urban places by adding housing, retail, restaurants, entertainment, and community amenities (e.g., Canada Way/Willingdon area).

3. <u>Outstanding Urban Places</u>
Consider whether there are one or two locations in Burnaby with the potential to become outstanding urban places that accommodate clusters of technology.

4. <u>Faster Processes</u>
Continue to emphasize high quality design and construction in new urban development, as this contributes to the overall quality of the community, but still find ways to increase efficiency, speed, and flexibility in approvals processes without compromising design standards.

5. <u>Amenities</u>
Continue to add to the amenity base so that Burnaby continues to be an attractive place to live and an attractive place to locate a business.

6. <u>Beautification</u>
Consider putting a higher priority on beautification of the public realm, especially on major roads, and through high density residential and employment districts.

G3 Creating Urban Character

7. Guidelines and Regulations

   Consider reviewing existing design guidelines and regulations that govern new developments to find ways to make them more urban, possibly including:

   a) Stronger relationships between new buildings and the street, instead of large front setbacks which produce a campus image.

   b) Greater variety in architectural character.

   c) Less (or at least less prominent) surface car parking.

8. Transit Service
   Continue to work with regional transit authorities to find ways to improve bus routes and schedules for employment concentrations that are not served by rapid transit. Scheduling should reflect Burnaby's large number of people who work evenings and weekends.

9. Urban Design
   Consider ensuring a strong urban design presence (expertise and resources) is maintained within the Planning Department to focus on these issues and implement the Burnaby Beautification Strategy currently being developed.

G4 Striving for a Greener Community

Theme

Burnaby has and will continue to embrace sustainability, smart growth, and green building technology in the planning, design, development, and operation of the community.

This is not just good community planning; it is good business too, as more and more firms want to locate in communities that are healthy, green, and resource-efficient.

Objectives

Burnaby intends to position itself as a leader in sustainable community development, cognizant of the challenge of trying to make a difference as one municipality in a large metropolitan region.

Burnaby realizes that "sustainability" and "green building technology" will be warning flags to some developers, who may fear increased cost and over-regulation, so Burnaby's aim will be to ensure that these risks are avoided.

Courtesy of University


GREEN ROOF Courtesy of UniverCity

Progress to Date

Burnaby has a long and robust history of being a municipal environmental leader:

- 2007 *Phillips Environmental Awareness and Knowledge (PEAK) Award*
- 2006 Community (transit) Pass (1st in Canada);
- 2006 Techno Trash recycling (1st in Lower Mainland);
- 2005 Bulk BioDiesel purchase participant;
- 2004 *Energy Retrofit* (1st in BC);
- 2004 Salmon return to upper Stoney Creek (1st time in 50 years);
- 2004 *Stream of Dreams* wins national Canadian Environmental Award;
- 2004 Burnaby's first Eco-sculpture;
- 2002 Fraser Basin Council *Overall Sustainability Award;*
- 1998 25% of the City designated as parks or open space;
- 1996 Ministry of Environment *Award for Cities;*
- 1993 Non-chemical landscaping approach for City lands;
- 1993 First city to be part of *Rivers Day* (now a global event!);
- 1992 Environmental Planner position (1st in BC);
- 1992 Employee Trip Reduction Program established; and
- 1973 *Open Watercourse Policy.*

Burnaby has partnered in *sustainable community design* at the following showcase projects:

- METROTOWN, in Burnaby, is arguably the region's most successful mixed used regional town centre.

G4 Striving for a Greener Community

Progress to Date (continued)

- UNIVERCITY, a residential neighbourhood adjacent to SFU, when completed, UniverCity will accommodate up to 10,000 residents surrounding the SFU campus).

  UniverCity includes permeable roads, green roof, rainwater management, green energy, walkable neighbourhood, high street, extensive pedestrian/bicycle path system, traffic calming, community passes, and cooperative car sharing. A centrally located elementary school, community centre, neighbourhood park, and childcare facilties are also proposed.

- CITY IN THE PARK, a residential neighbourhood within the Edmonds municipal town centre.

Burnaby also has a significant number of *green buildings* and *infrastructure* projects:

- APEG BC (a two storey office building constructed in 1995) - geothermal/ solar heated/cooled.
- BURNABY MOUNTAIN SECONDARY SCHOOL (15,000 sq. m. constructed in 2000) - geothermal heated/ cooled building.
- KWL (1,650 sq. m. of office space) awarded LEED-CI certification in 2005.
- MILLENNIUM LINE SKYTRAIN STATIONS - high fly ash (hvfa) concrete used (Brentwood Stn., Gilmore Stn.).
- METRO SKATE PARK - EcoSmart concrete used.

- UNIVERCITY, CORNERSTONE - geothermal heated/ cooled retail and office spaces, water conserving two-flush toilets and waterless urinals, a ventilation system which recovers heat from building exhaust, and a green roof.

Action Plan

The City will undertake the following actions:

1. <u>Take a Leadership Position</u>
   Explore ways to promote Burnaby's position as a leader in sustainability, to ensure that prospective businesses are aware of this and to ensure that the development community sees this as an opportunity, not an obstacle.

a) Municipal Purchasing
Consider increasing the profile of the existing municipal purchasing policy that includes sustainability criteria in the acquisition of goods and services.

b) Green Business Centre
Examine designating and advancing an area as a green business centre where some existing businesses are already located to further develop and promote new sustainability initiatives.

G4 Striving for a Greener Community

c) Eco-industrial Networking
(Reusing Industrial/Business Bi-products)
Consider encouraging Eco-industrial networking within the City. Start the program on a trial basis on one designated business area, as a method of building inter-business dialogue and cooperation through the reuse of industrial/business bi-products and/or processes (e.g., training, purchasing, provision of services).

Consider developing and adopting a city-wide comprehensive eco-industrial networking strategy.

d) Municipal Standards
Pursue adopting municipal engineering standards for roads and stormwater management that are more environmentally-friendly and cost less to build.

e) City's Vehicle Fleet – Fuel(s)
Explore options for making the City's existing vehicle fleet more energy efficient and less dependent on fossil fuel (e.g., existing program of participating in the bulk purchase of biodeisel by municipal fleets).

f) City's Vehicle Fleet – Size
Consider reviewing utilization of existing fleet and consider ways of sharing or pooling fleet vehicles to reduce the overall number of vehicles being used.

g) Green Building Technology
Examine working with the development industry (via existing organizations, such as Urban Development Institute (UDI)) to develop green building technology objectives or standards for new buildings that are workable and that will make a meaningful contribution to reduced energy consumption, reduced waste, lower resource use, and healthier environments. Highlight innovations and success stories, such as UniverCity at SFU.

h) Green Civic Building Standards
Assess adopting LEED standards and/or principles for civic building construction.

i) Approvals
Explore ways to expedite the approvals process for projects that meet defined minimum criteria for sustainability and green building technology, such as priority application processing and modified City development cost charges (DCC's) to reflect reduced loads on municipal infrastructure.

G4 Striving for a Greener Community

2. <u>A strategy to attract green businesses to Burnaby</u>

a) What is the draw?

Consider defining and pursuing the factors that the green business community use in making location decisions, and evaluate Burnaby's competitiveness in attracting and retaining businesses and families of the workers who are part of the general "green business" community;

b) What do we have now?

Evaluate the changes required to bring Burnaby's neighbourhoods to the forefront of competitiveness in attracting the general "green business" community and the workers' families; and

c) Work on what is missing

Explore working policies and programs into Burnaby's "way of doing business" to begin to make its mixed use neighbourhoods more competitive as locations to live and locations to do business.

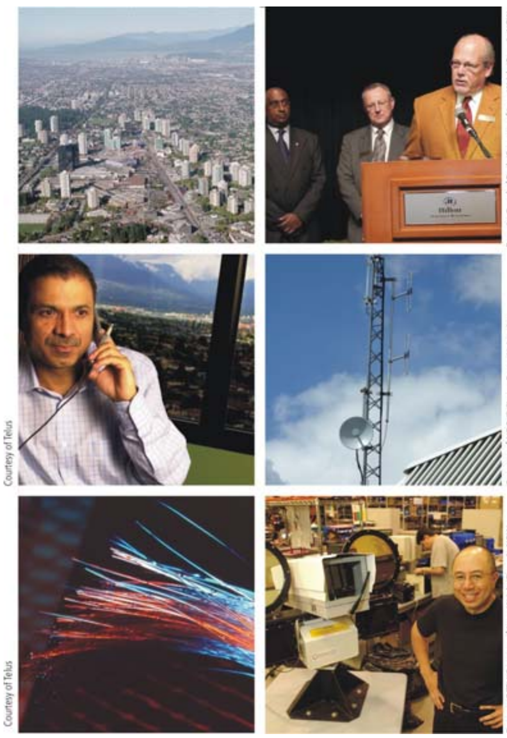
3. Targets
   Consider adopting aggressive targets to further reduce Burnaby's total ecological footprint, such as reductions in total solid waste (with corresponding increases in recycling), increased transit ridership and reduced private automobile trips, and reductions in total carbon dioxide emissions.

4. Sustainable Business Practices
   Encourage the Burnaby Board of Trade to introduce an award and work with local businesses and organizations to implement new measures that respect the environment, reduce community impacts, and foster sustainable development (this action is also listed in General Strategy G9).

5. Organic Farming
   Examine working with the GVRD to encourage local farmers to consider adopting organic farming practices whenever possible and report back the success stories (note this action is also listed in Sectoral Strategy S10).

6. Heavy Industry
   Continue working constructively with the existing older heavy industries, mainly in the petrochemical sector, to reduce impacts on the environment and adjacent neighbourhoods.

G5 Marketing Burnaby as a Premier Business Location



Burnaby Board of Trade/Courtesy of Larry Wright/BurnabyNOW

Courtesy of Telus

Courtesy of LIDC @ Simon Fraser University

Courtesy of Telus

Extreme CCTV/Courtesy of Larry Wright/BurnabyNOW

Theme

As with all of the suburban municipalities in the region, even those with very large shares of regional employment, Burnaby's identity as a distinct community is eclipsed by the strength of the "Vancouver" brand. This is not all bad, as Vancouver has a high profile and good reputation on the international scene. Burnaby benefits from Vancouver's ability to draw business, tourists, and immigrants who then consider options in the region without being confined to Vancouver's city limits.

Objective

Burnaby would benefit from better distinguishing itself from the rest of the region, just as Berkeley in the San Francisco area and Cambridge in Greater Boston have achieved independent recognition while enjoying the association with a well-known region.

Progress to Date

The City currently runs ads in business magazines, and the *Burnaby Board of Trade* hosts the annual Burnaby Business Awards to celebrate business excellence in Burnaby.

Action Plan

This Strategy does not advocate going to great lengths (or great expense) to make Burnaby a household word outside of the Lower Mainland, but it does advocate an effort to give Burnaby a higher profile within the region.

The City will undertake the following actions:

1. <u>Accurate Information</u>
   Consider auditing regional-scale information provided by government agencies or industry associations (websites, brochures), that include Burnaby, to ensure it is accurate and complete.

2. <u>Branding</u>
   Consider branding the City to provide a powerful, and relatively inexpensive, way to enhance the City's economic development program. The City's brand should be distinct and supported by the City's residents, and be consistent with other brands including the *Burnaby Board of Trade* and *Tourism Burnaby*.

3. <u>Profile</u>
   Look for opportunities to encourage and assist local agencies (such as the *Burnaby Board of Trade* and *Tourism Burnaby*) to have a higher profile in the region and in the Province (this action is also listed in General Strategy G9).

G5 Marketing Burnaby as a Premier Business Location

4. Success Stories
Consider working with the *Burnaby Board of Trade* to publicize Burnaby success stories and Burnaby-based firms that are internationally known, so that they are associated with Burnaby (this action is also listed in General Strategy G9).

5. Local Champions
Look for opportunities to encourage major institutions and firms to identify themselves as being located in Burnaby.

6. Communications Plan
Develop a strategic communications plan to reach key business markets.

a) Community Information
Consider posting information used by companies making site selection decisions on the City's website (i.e., top ten employers within the community).

b) Domestic Marketing
Explore the possibility of periodic marketing in select BC based business related publications to get the word out about Burnaby's advantages as a business location.

c) International Marketing

Explore marketing initiatives that involve Burnaby's Sister Cities, and other strategically selected cities in other countries to develop new business prospects.

d) Targeted Business Recruitment

Consider working with existing businesses in Burnaby to identify firms that could be potential recruitment targets and make sure they have the information they need to consider a location within Burnaby.

7. <u>Communications Budget</u>

Consider establishing a line item within the City's annual operating budget for corporate advertising and communications oriented to economic development and business recruitment.

G6 Fielding the Right Economic Development Team

Theme

The City does not currently have an Economic Development department or office per se. The City's economic development functions (providing information to business, fielding enquiries from possible new businesses, helping new business go through approvals processes, promoting Burnaby) are handled by staff within the Planning Department.

Objectives

There is room for improvement, and there is value in making sure that the outside world knows the best points of contact for information, assistance, and help dealing with obstacles.

Other local agencies interested in economic development in Burnaby are the *Burnaby Board of Trade* and the recently created *Tourism Burnaby*. It is important that these agencies and the City coordinate their work.

Progress to Date

It has not been a part of Burnaby's municipal culture to set up an Economic Development Office that is seen as opposing or offsetting other departments that are then stereotyped as obstacles. The City has generally done a good job of combining the role of regulator and advocate and this approach is a good fit with the way City staff work.

Courtesy of Larry Wright/BurnabyNOW

The City has in past years issued a grant to the Board of Trade to support its activities as a not-for-profit business association. The Burnaby Board of Trade is made up of business people and professionals who volunteer their time and resources to make Burnaby a "great place to do business". For more detailed information on the *Burnaby Board of Trade*, please see General Strategy G9 – Working with the Burnaby Board of Trade, Tourism Burnaby.

Tourism Burnaby was also recently formed in 2005 to support the promotion of tourism in Burnaby and to encourage and coordinate education, marketing and other activities intended to increase the number of visitors to Burnaby. *Tourism Burnaby* is funded by a 2% hotel room tax. The *Burnaby Board of Trade* and *Tourism Burnaby* are seeking ways to partner on shared strategic initiatives, although their respective Boards of Directors will remain separate.

The City currently operates a tourism program in support of economic development. This program consists of a staffed Metropolis tourism centre, a staffed City Hall tourist information centre, the issue of 100,000 colour copies of the "Burnaby Visitors Guide" throughout BC annually, and hosting a "visitors" information section on the City's website.

G6 Fielding the Right Economic Development Team

Action Plan

In an effort to field the right economic development team, the City will undertake the following actions:

1. Roles and Responsibilities

a) Roles

Work with the *Burnaby Board of Trade* and *Tourism Burnaby* to develop a clear understanding of each organization's role in the overall approach to local economic development (also see General Strategy G9 – Working with the Burnaby Board of Trade, Tourism Burnaby).

b) Responsibilities

Endorse the continued economic development efforts of the Burnaby Board of Trade, particularly those related to promoting business networking, business advocacy, and business education (also see General Strategy G9 for more detail).

c) Agreement

Consider more clearly codifying the Board of Trade's economic development role in the form of an agreement (also see General Strategy G9 for more detail).

2. Designate Staff

Define and consider different options for staff resources. These could range from naming a senior member of the Planning Department as the Economic Development Planner to creating a small core team of people. The recommended option will be forwarded to Council for their consideration and will be balanced against other competing operating requirements for the City. The role(s) of the team could include:

a) Contact Person

Being the first point of contact for prospective new businesses looking for locations or information.

b) Progress

Monitoring progress on the implementation of the Economic Development Strategy and economic development activities in general.

c) Coordination

Liaising with the *Burnaby Board of Trade*, *Tourism Burnaby*, and others.

d) Advocate

Acting as an ombudsman or champion for developers or businesses who perceive that they are encountering unnecessary delay or inappropriate demands.

G6 Fielding the Right Economic Development Team

e) Knowledge

Developing relevant expertise (or at least knowledge) about Burnaby's various sectors – understand the issues, opportunities, and find ways to help. This is particularly important for the technology; biotech, health, life science; and film/television sectors, as they have very different requirements than traditional businesses.

G7 Cultivating a "Business Friendly" Reputation

Theme

Burnaby does not want to give the impression that it encourages any kind of growth or development for its own sake, but the City does want to have a reputation for encouraging economic growth which is consistent with the Official Community Plan (OCP) and Economic Development Strategy (EDS).

Objective

This Economic Development Strategy and the Official Community Plan make it very clear that Burnaby wants to encourage development that is consistent with its vision for the future of the community. This creates a risk that Burnaby becomes regarded as being anti-business, which can discourage even the investors, developers, and firms that Burnaby welcomes.

Action Plan

This is a difficult balancing act, but an important one, so that Burnaby continues to attract large shares of regional employment in the preferred sectors.

The City will undertake the following actions:

1. <u>Communication</u>
   Pursue publicizing the Economic Development Strategy, so that the development community, industry associations, realtors, businesses, and investors know that Burnaby welcomes growth that is consistent with its vision for urban quality and sustainability.

2. <u>Dialogue</u>
   Look for opportunities to convene periodic meetings with the *Burnaby Board of Trade*, *Tourism Burnaby*, industry associations, the development industry, realtors, and major employers to explore ways in which Burnaby can be more helpful.

3. <u>Approval Processes</u>
   Consider reviewing development approval processes to ensure that they are efficient, fast, and business-friendly without compromising standards for quality.

4. <u>Action</u>
   Look for opportunities to ensure that planning and engineering staff assigned to work with development applicants have a constructive attitude oriented to "how can we make this work".

G8 Nurturing a Strong, Diverse, Welcoming, Caring Society

Theme

The region's social characteristics or demographics are changing and the region is increasingly ethnically diverse – this is a source of both challenges and opportunities.

Objective

Burnaby will attract workers, investors, entrepreneurs, students, and self-employed people, if it is regarded as a welcoming, safe community that is concerned about the quality of life, and believes that one aim of economic development is to enhance access to opportunities for all citizens. Helping to nurture a strong society is one of the ways to attract business.

Progress to Date

Progress to date in this area is described in detail in Sector Strategy S11.

Action Plan

Burnaby intends to embrace community diversity by welcoming all groups and giving them the appropriate encouragement to locate their homes and businesses in Burnaby.

The City will undertake the following actions:

1. <u>Socio-demographic Community Profile</u>
   Consider preparing a detailed socio-demographic profile of Burnaby to establish baseline indicators of crime and safety, health, education, income, homelessness, language, and social welfare.

2. <u>Monitoring</u>
   Continue to monitor socio-demographic trends and conditions to see which are improving, stable, or deteriorating.

3. <u>Provincial Funding</u>
   Pursue using Burnaby's influence with regional and provincial governments in a strategic, cooperative, and coordinated manner to tackle obvious social problems, such as homelessness, child welfare, and drug abuse.

4. <u>Diversity</u>
   Consider signalling Burnaby's openness to diversity through translation of City documents, increased support for ESL programs, advocacy for immigration groups, and staging of celebrations/events.

5. <u>Employment</u>
   Assess showing leadership in hiring people who need assistance in entering the workforce.

G8 Nurturing a Strong, Diverse, Welcoming, Caring Society

6. Not-for-profits
   Explore ways in which the City can better assist not-for-profit agencies in Burnaby that are engaged in helping citizens become more able to participate in the local economy (see Sector Strategy S11 for more detail).

G9 Working with the Burnaby Board of Trade, Tourism Burnaby

Theme

During the sector workshops hosted in support of the Burnaby EDS Update, the recent growth and potential of the *Burnaby Board of Trade* was recognized. Moreover, there were several references made to opportunities which the *Burnaby Board of Trade* is particularly well positioned to advance.

Background

The *Burnaby Board of Trade* is Burnaby's pre-eminent business association. The *Burnaby Board of Trade* is a not-for-profit, member-driven, independent, apolitical, business association made up of business people and professionals who volunteer their time and resources to make Burnaby a "great place to do business". The *Burnaby Board of Trade* is supported by a core group of paid staff who report through the Executive Director for the Board of Trade to their Board of Directors.

47% of BC Employment is within small companies and 58% of all of these small companies are located within the Lower Mainland.[17] Although BC has been very successful at starting new businesses, there has been less success in growing them. The *Burnaby Board of Trade* is particularly well positioned to assist in helping small businesses achieve growth.

Working with the Burnaby Board of Trade, Tourism Burnaby

AFTER EIGHT/Courtesy of Larry Wright/BurnabyNOW

PEAR TREE/Courtesy of Larry Wright/BurnabyNOW

The *Burnaby Board of Trade* has in recent years received an annual grant from the City of Burnaby to support a portion of its operating budget.

Objective

Work with the *Burnaby Board of Trade* to accelerate its growth and increase its presence and effectiveness in the local business community.

Progress to Date

As of 2006, the *Burnaby Board of Trade* has over 550 members and offers:

- recognition of business excellence through the annual *Burnaby Business Excellence Awards*;
- networking/business prospecting events;
- business-to-business, member-to-member advertising and sponsorship opportunities;
- trade shows;
- trade delegations;
- educational and informational workshops;
- opportunities to participate in issue-driven task forces and board committees;
- opportunities to build relationships with the various local ethic business communities;

G9 Working with the Burnaby Board of Trade, Tourism Burnaby

- numerous personal and business discounts (financial resources, payroll services, credit card rates, local and long distance phone service, teleconferencing service, gasoline, equipment rental); and
- automatic membership in both the BC and Canadian Chambers of Commerce.

The *Burnaby Board of Trade* recently led the formation of *Tourism Burnaby*. This not-for-profit organization was formed to support promotion, marketing, and other activities intended to increase the number of visitors to Burnaby.

Tourism Burnaby is funded by a 2% hotel room tax. The *Burnaby Board of Trade* and *Tourism Burnaby* are seeking ways to partner on shared strategic initatives, although their respective Boards of Directors will remain separate.

EDS Focus

Within the context of the Burnaby EDS 2020 a number of elements or economic development levers as they relate to the Burnaby Board of Trade include:

1. Better define roles and responsibilities;
2. Assist with new business recruitment;
3. Host sector specific events; and
4. Encourage and recognize sustainable business practices.

Action Plan

The City will undertake the following actions:

1. Roles and Responsibilities

a) *Roles*

Consider working with the *Burnaby Board of Trade* and *Tourism Burnaby* to develop a clear understanding of each organization's role in the overall approach to local economic development (note this action is also listed in General Strategy G6 – Fielding the Right Economic Development Team).

G9 Working with the Burnaby Board of Trade, Tourism Burnaby

b) Responsibilities

Endorse the continued economic development efforts of the *Burnaby Board of Trade*, particularly those related to promoting business networking, business advocacy, and business education (note this action is also listed in General Strategy G6 – Fielding the Right Economic Development Team).

c) Agreement

Consider more clearly codifying the Board of Trade's economic development role in the form of an agreement (note this action is also listed in General Strategy G6 – Fielding the Right Economic Development Team).

2. New Business Recruitment

a) Community Boosters

Look for opportunities to work with the *Burnaby Board of Trade* to enlist the assistance of existing major firms in the recruitment of new firms (note this action is also listed in Sectoral Strategy S1 – Information Technology, Communications/Wireless).

b) Profile

Encourage and assist local agencies (such as the *Burnaby Board of Trade* and *Tourism Burnaby*) to have a higher profile in the region and in the Province (note this action is also listed in General Strategy G5 – Marketing Burnaby as a Premier Business Location).

c) Success Stories

Continue to work with the *Burnaby Board of Trade* to publicize success stories and Burnaby based firms that are internationally known, so that they are associated with Burnaby (note this action is also listed in General Strategy G5 – Marketing Burnaby as a Premier Business Location).

d) Sector Specific Events

Consider working with the *Burnaby Board of Trade* to publicize Burnaby's role as having a variety of major industrial clusters (note this action is also listed in General Strategy G5 – Marketing Burnaby as a Premier Business Location).

e) Business-Education Partnership

Encourage the *Burnaby Board of Trade* to promote the idea of business and education partnerships with their members. Explore this potential on a sectoral basis, including film/television, technology, and tourism.

3. <u>Sector Specific Networking Events</u>

Invite key players from different sectors to discuss potentially beneficial links between them, and highlight successful Burnaby businesses, especially collaborations – winners like to be near winners.

a) Sector-focused Meetings

Look for opportunities, in association with the *Burnaby Board of Trade*, to initiate a series of sector-focused meetings. These meetings could help the City, the *Burnaby Board of Trade*, and businesses within each sector keep in touch with each other.

G9 Working with the Burnaby Board of Trade, Tourism Burnaby

b) Contact

Consider maintaining contacts with individuals and associations within these sub sectors; and

c) Alliances

Consider liaising with SFU and BCIT and form deeper alliances with green business sector companies to maximize benefits of a three-way interrelationship between academia, business and government – utilize the important role universities play in this sector.

4. Sustainable Business Practices (note this action is also listed in General Strategy G4 – Striving for a Greener Community)

a) Sustainable Business Practices

Consider encouraging the Burnaby Board of Trade to introduce an award recognizing sustainable business practices. This would encourage local businesses and organizations to implement measures that support social responsibility, respect the environment, reduce community impacts, and foster sustainable development.

G10 Cooperating Regionally

Theme

There is not a regional economic development function in Greater Vancouver, which is unfortunate, because there are many aspects of economic development that are inherently regional in scope. Improving the regional transportation network, addressing regulatory complexity in a multi-jurisdictional region, marketing/recruiting at the national and international levels, addressing regional land supply issues, and addressing regional quality of life issues (such as air quality, water supply, solid waste) are just a few examples of economic development functions that should be approached regionally.

Objective

Burnaby must concentrate on strengthening its own local economy, but it should also look for opportunities to cooperate with like-minded municipalities on matters that transcend municipal boundaries.

Progress to Date

An *Economic Leadership Council* was cast in 2004 November, to oversee the development of a business case required to create an organization aimed at driving regional prosperity.

The goal of this new agency was to be an umbrella organization that would complement, but not replace individual local economic development initiatives of the Lower Mainland municipalities.

The Greater Vancouver region is Canada's Pacific gateway and one of the nation's largest economic areas, hosting 2.13 million residents, a labour force of more than 1.2 million people and contributing more than 55% of British Columbia's GDP. The Greater Vancouver region is the economic centre of BC and is home to more than 50 per cent of BC's population and labour force.[18]

The Greater Vancouver Economic Council (GVEC)

Many regions place a strong emphasis on business investment attraction, while others focus on facilitating internal growth. The GVEC will do both.

The overall *mission* of Greater Vancouver Economic Council is:

"To stimulate investment and new employment in the Greater Vancouver Region by creating a clear vision and economic strategy for the Region, within a sustainable context."[19]

G10 Cooperating Regionally

The GVEC has identified the following *objectives*[20] to fulfill their mission:

- *Work within* what is already a healthy, broad, civil economy.
- *Be the catalyst* to expand industrial clusters and strengthen the regional economy through collaborative effort.
- Build Greater Vancouver as *the West's Gateway to Asia* and *Canada's "Creative City."*
- *Take the lead in attracting investment* to the Region through marketing and branding.
- Ensure that Greater Vancouver is properly *benchmarked* against its competitors.

The GVEC recently released a five-year business plan and are in the process of seeking partnership funding from senior levels of government.

Action Plan

In an effort to cooperate on regional economic development activities the City will undertake the following actions:

Cooperating Regionally

1. <u>Inter-municipal Initiatives</u>
   Explore opportunities to work with other municipalities on economic development initiatives that are of mutual interest (e.g., North Road BIA, and/or streamlining of filming requirements of different municipalities).

2. <u>Regional Programs</u>
   Assess supporting initiatives to create regional level economic development programs, provided that these do not erode Burnaby's autonomy, are truly intended to benefit all municipalities (not benefit some at the expense of others), and have a community development vision that is consistent with Burnaby's vision.

3. <u>Regional Events</u>
   Consider participating in regional events (conferences, meetings) about economic development.

4. <u>Peer-to-peer Contact</u>
   Pursue maintaining relationships with economic development counterparts in other municipalities so that opportunities to pool resources in research, monitoring, marketing, and planning can be explored.

G11 Making Progress on Regional Transportation

Theme

"Making progress" does not sound very aggressive, but the reality is that one municipality cannot solve complex regional transportation problems on its own.

Objective

Burnaby can take constructive actions within its jurisdiction, cooperate with other municipalities with similar interests and viewpoints, and try to influence the regional and provincial authorities that make major capital and operating decisions about the regional major road network, regional transit systems, and provincial highway system.

Progress to Date

On the supply side - Burnaby is served by: four interchanges on the Trans Canada Highway; 11 SkyTrain Stations on two SkyTrain lines; over 30 bus routes; and more kilometres of HOV lane than any other municipality in the region (44 km or 41% of the GVRD total).[21]

On the demand side – Burnaby is the second largest carpooling destination in the region outside of the City of Vancouver[22]; Simon Fraser University was a charter partner in TransLink's U-Pass; and UniverCity will be the first neighbourhood in Canada to have a C-Pass.

Progress to Date (continued)

However, Burnaby's competitive edge as a central, accessible location is being eroded by traffic congestion, so Burnaby should support initiatives that make strategic improvements.

Simply building more east-west highway capacity in the region, without using this capacity wisely and without also taking steps to manage total transportation demand, is not going to solve the problem.

Experience with increases in highway capacity (new river crossings, new highways, additional lanes) shows that, in the absence of measures to target the capacity and manage demand, the new capacity quickly gets used up as urban development patterns, commuter travel patterns, and population distribution try (in the short term) to take advantage of the increased transportation supply. Soon the system is back to the same unsatisfactory level of service.

Burnaby has advocated continued enhancement of the regional transit system and the regional highway/crossing network, provided that new road capacity is used for high occupancy vehicles and goods transportation, and provided that demand management measures, such as tolling are used.

G11 Making Progress on Regional Transportation

Action Plan

In an effort to make progress on regional transportation issues, the City will undertake the following actions:

1. LRSP
   Continue to support the goals of the regional growth strategy – the *Livable Region Strategic Plan (LRSP)*.

2. Moving People
   Pursue working with regional transit authorities (TransLink and Coast Mountain Bus) to ensure that bus service is optimally aligned with rapid transit routes, and that all major employment concentrations in Burnaby have good transit service (note this action is also listed in Sectoral Strategy S1 – Information Technology, Communications/Wireless).

3. Moving Goods
   Generally support improvements to the regional highway network, (such as the North Fraser and South Fraser Perimeter Roads) provided the extra capacity is used for improving goods movement, transit vehicles, and high occupancy vehicles.

4. Transportation Demand Management (TDM)
   Consider supporting transportation demand management measures.

a) Employee Trip Reduction Program – Corporate Program

Continue to support employee trip reduction to encourage City employees to reduce car use for travel to/from work. This long standing corporate program includes incentives for cycling and transit use, as well as trip reduction methods such as car pooling.

b) Employer Travel Programs – City Wide

Assess working with TransLink to encourage major employers in Burnaby to adopt strategies to reduce car use, and participate in TransLink's Onboard, Employer Pass Program or the Jack Bell's RideShare program (vanpooling, carpooling and ridematching).

c) U-Pass

Consider encouraging and supporting TransLink to expand the U-Pass program to other post-secondary institutions.

d) C-Pass

Pursue supporting TransLink in their implementation of C-Pass at UniverCity, and encourage TransLink to consider expanding the C-Pass program to other residential neighbourhoods in Burnaby.

Sectoral Strategies

Sectoral Strategies (S)

This section outlines strategies for each of the following specific groups of sectors (with the first five groups all being knowledge based):

Knowledge Based

S1:	Information Technology, Communications/ Wireless
S2:	Biotechnology, Health, Life Science
S3:	Film, Television, Digital Entertainment, New Media
S4:	Education
S5:	Environmental Technology, Services
S6:	Tourism, Sport/Tournaments, Arts/Culture, Retail
S7:	Finance, Management, Professional Services
S8:	Light Industry, Warehousing/Distribution
S9:	Heavy Industry
S10:	Agriculture
S11:	Social Integration, Not-for-profit

Each sector strategy contains:

1. ***Sector Fact Sheet***
   Each fact sheet provides the following sector specific information at a glance:
   Existing Situation
   - *Example companies* located within Burnaby.
   - Map of where sector *companies are clustered* in Burnaby.
   - *Regional competitive advantage*[23] relative to the GVRD average.
   - *Typical business size* within Burnaby.
   - *Stage* of the sector within Burnaby (seed, emerging, transforming, or expanding).[24]

   Forecast
   - *Regional outlook* or forecast for sector growth (growth, stable, or decline).

   This information presents key findings of the Trend Analysis and Cluster Analysis undertaken as the research foundation or starting point for the Burnaby EDS Update.
2. ***Sector Definitions***
   The assumptions about which aspects of the industries have been included within each sector are described.
3. ***Sector Overview***
   A brief overview of the sector within the province of British Columbia and Greater Vancouver.
4. ***Sector Elements in Burnaby***
   Snaps down to describe the sector within the City of Burnaby.
5. ***Sector Trends***
   Highlights some of the key trends identified by local industry leaders.
6. ***Sector Opportunities***
   Highlights some of the opportunities identified by local industry leaders.
7. ***Sector Action Plan***
   Action plan specific to this sector of Burnaby's local economy.

It should be noted that the sector trends, sector opportunities, and sector action plan within each sector strategy rely heavily on input from local industry leaders. Over 100 people attended nine sub-committee workshops formed to cover 23 different sectors of the local economy in support of updating the 1990 Burnaby EDS.

S1: Information Technology, Communications/Wireless

Burnaby Sector Fact Sheet S1

Information Technology, Communications/Wireless

Example Businesses In Burnaby

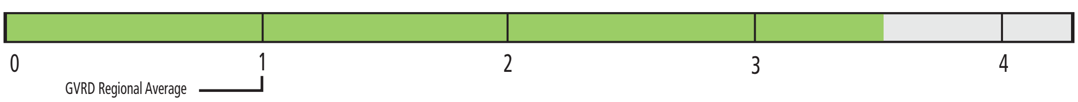
<u>Information Technology</u>
Alpha Technologies
Chancery Software
Cray-Octiga
Creation Technologies
Class Software
Convedia
Dorigo Systems
Digital Payment Technologies
Info Touch
PMC Sierra
Quatech Systems
Teradici

<u>Communications/Wireless</u>
Agilent Technologies
Alcatel Canada
Fido Solutions
Glentel
Info Wave Software
Telus
Nokia
Norsat International
Rogers Communications
Spectrum Signal Processing
Unity Wireless

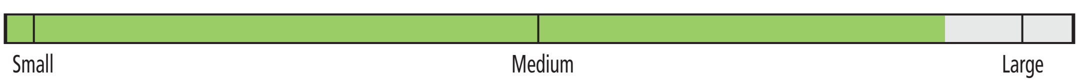
<u>Photonics</u>
Argus Technologies
Extreme CCTV
JGKB Photonics
Kodak (formerly Creo)
Photon Control
TIR Systems

Where Sector Businesses are Clustered

Regional Competitive Advantage



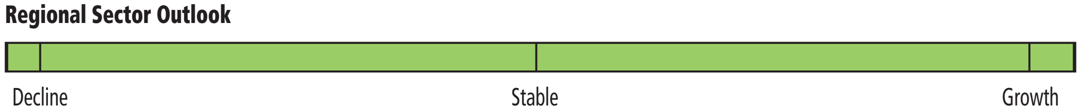
Typical Business Size



Stage of Sector

Seed ○ Emerging ● (IT, Wireless) Expanding ○ Transforming ● (Communications)

Regional Sector Outlook



Information Technology and Communications/Wireless

S1 Definitions

The "information technology and communications/wireless" sector encompasses firms engaged in the development and delivery of computer hardware, computer software, wireless technology, and communications technology (including networks).

Sector Overview

Production costs of *telecommunications equipment* in Canada were the lowest of the 11 countries reviewed – the cost gap between Canada and the US was 3.3 percent.[25] *Software design* costs were second lowest with a cost advantage of over 13% over the US or a 20% savings in total annual operating costs compared to the west coast of the US.[26]

The *information technology, communications* sector is one of the largest revenue generators ($13 billion in 2001) among BC's technology clusters, employing more than 56,000 people in the Province as of 2002.[27] This sector employs highly educated workers and is primarily made up of small, young firms.

BC's *wireless* sector is estimated at over $1 billion, equal in size to the film industry in BC.[28] BC's wireless cluster is comprised of about 150 companies[29] and about 5,500[30] employees with the revenue in this cluster being the most evenly distributed of all BC's technology clusters.[31]

S1 Burnaby

The information technology (IT), communications/ wireless sector could be considered signature industries within Burnaby as there is a large cluster of firms and jobs in Burnaby.

Information technology, communications/ wireless companies tend to work on tight margins, so cost control is important. The main factor that has drawn companies in these sectors to Burnaby appears to be low land/space costs. Having achieved a large cluster of major firms gives Burnaby an edge in attracting more of these firms in the future.

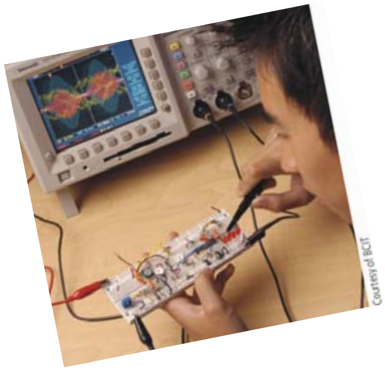
Burnaby is home to both industry leading companies (Telus, Nokia, PMC Sierra, and Kodak - formerly Creo) as well as a number of small to medium companies that are considered to be industry leaders in *information technology* (Digital Payment Technologies), *photonics* (Extreme CCTV, TIR Systems Ltd), and *wireless* (Infowave Software, Norsat International, Spectrum Signal Processing, Unity Wireless).

The Wireless Innovation Network of BC (WIN BC) alone lists 39 of it's members as being located in Burnaby.

Courtesy of Telus

Courtesy of PMC Sierra

Courtesy of Burnaby-New Westminster NewsLeader


Courtesy of BCIT


Courtesy of UDC @ SFU


Courtesy UDC @ SFU


Courtesy UDC @ SFU

Burnaby (continued)

Burnaby also has strong post secondary education links.

BCIT has a program for Advanced Information Technology and has recently opened a Technology Commercialization Office (TCO). BCIT's TCO helps BCIT researchers and industry-based clients to focus projects towards the needs of the market place.

SFU has been active in research, technology transfer, and licencing intellectual property for many years (ranked number one for the number of start-up companies per research dollar and ranked number two for the ratio of US patents per research dollar within Canada in 2002),[32] which has resulted in many spin-off companies (about one half being in the IT sector).

SFU has a very significant presence in research and teaching in the fields of information technology and communications/wireless engineering, in addition to having Canada's leading programmes in communications and interactive arts and technology.

Beyond these engines for research and development (R&D), SFU has a major presence in applied mathematics, being host to the *National Centre of Excellence in Mathematics of IT and Complex Systems*, a research enterprise that has realized more private sector investment in cash than any other research activity in the country.

S1 Trends

The *information technology, communications/ wireless* cluster is the most mature technology sector in BC with about half of all companies being more than 11 years old.[33]

Courtesy of PMC Sierra

The majority (about 80%) of companies in the *information technology, communications* sector in BC provide computer and engineering services (software development and computer system design).[34]

Courtesy of Larry Wright/BurnabyNOW

This sector has a shorter industrial development cycle and therefore offers the potential for strong short to medium term growth.

Notwithstanding the turbulent late 1990s, this sector continues to have enormous growth potential. Employment is forecast to more than double (increase to 110,000) within BC by 2010.[35]

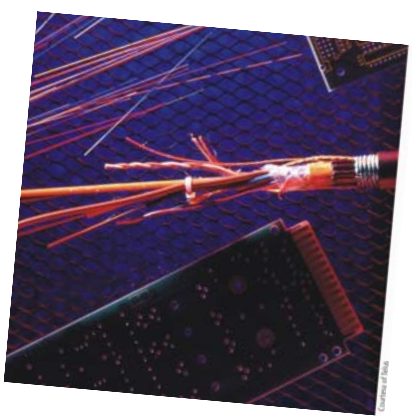
MOUNT EREBUS/Courtesy of Extreme CCTV

The majority (77%) of *wireless* companies in BC report their future growth will primarily come from new products or technology, but also view marketing, partnerships, qualified employees, and funding as being necessary.[36]

About 31% provide complete business solutions, 17% develop wireless devices, and 9% produce components.[37]

Courtesy of PMC Sierra

Approximately 44% of BC's wireless companies are more than six years old.[38] The strong recent employment growth in the wireless sector is expected to continue.



Opportunities

Increasing the number of Burnaby based companies in this sector will involve capturing market share, and fostering the continued growth of companies located here, including:

- creating a district brimming with urban character to appeal to some of the companies and workers in this sector;
- making travel to work as easy as possible for employees who live outside of the City; and
- ensuring Burnaby remains a cost-effective place to do business.

Companies in the information technology, communications/wireless sector require both wireless networks and reliable high speed internet service. The City should take a more active role in:

- ensuring that all levels within the organization are acting as agents of change and collaborating with business on finding solutions for technology based initiatives related to communication infrastructure; and
- providing additional communication conduits when roads are constructed or rehabilitated. Installation of these conduits can be done at a marginal cost, has significant benefit, and they are a potential revenue source for the City.

S1
Information Technology and Communications/Wireless

Sector Action Plan

The City will undertake the following actions:

Short-Term

Research and Development

Consider emphasizing the strategic importance of elevating the City of Burnaby to an important hub for the IT, communication/wireless sector in the new industrial economy:

- recognizing the existing concentration of important businesses investment and post-secondary capabilities present within Burnaby focused on this sector; and
- looking forward to the development of this sector through collaboration between industry and education.

Pursue working with post-secondary educational institutions and tech companies to take these relationships to a new level. The combination in Burnaby, of SFU, BCIT, and leading international players in the information sector, simply ought to provide the potential for more interaction and more exciting prospects. The City should challenge itself and these groups to do more with these raw ingredients.

New Businesses

Examine working with the Burnaby Board of Trade, to enlist the assistance of existing major firms in the recruitment of new firms (note: this action has also been listed in see General Strategy G9).

Signature Industry

Consider publicizing Burnaby's role as a major cluster of information technology, communications/wireless firms in BC.

Short-Term (continued)

Technology Leadership

Consider leading by example by embracing technology, through means such as:

- using state of the art technology to conduct its own business;
- supporting the installation of ADSL, cell, wireless, and fibre networks in the City; and
- using and showcasing local technologies and initiatives such as WiFi/WiMAX and online access to City services in City Hall.

Workable Solutions

Explore improving customer relations with firms that need City approvals by being more committed to the development and implementation of real solutions.

Medium Term

Wireless Lab

Consider promoting the establishment of a wireless lab in Burnaby, for shared access by many firms.

Conduits

Consider developing a network plan (with industry input) and an associated capital budget, to install City owned communication conduit as roads are constructed or rehabilitated in the future.

Ongoing

Employee Access

Look for opportunities to enhance bus service to employment and education hubs (note this action is also listed in General Strategy G11 – Making Progress on Regional Transportation Problems).

Cost-competitiveness

Examine monitoring property taxes to make sure that Burnaby remains competitive in the region.

S2: Biotechnology, Health, Life Science

Burnaby Sector Fact Sheet S2

Biotechnology, Health, Life Science

Example Businesses In Burnaby

Biotechnology/Life Science
Abgenix
BCIT (Tech. Com. Office)
CANTEST
Chromos Molecular Systems
Inex Pharmaceuticals
Protiva Biotherapeutics
SFU (Biomedical Engineering)
Xenon Pharmaceuticals

Health/E-health
Burnaby General Hospital
Telus (E-health Technology)

Medical Devices
Acoustica
Mitroflow
Neil Squire Foundation
Response Biomedical
Saturn Biomedical Systems

Where Sector Businesses are Clustered

Regional Competitive Advantage

0 1 2 3 4

GVRD Regional Average

Typical Business Size

Small Medium Large

Stage of Sector

Seed (Life Science) ● Emerging ○ Expanding ○ Transforming ○

Regional Sector Outlook

Decline Stable Growth

Biotechnology, Health, Life Science

S2

Definitions

"Biotechnology" and "life science" are usually privately financed firms involved in pharmaceuticals, genome science, medical research, and medical devices; while the "health care" sector is dominated by public sector community health care services.

Sector Overview

Over 90 Biotechnology companies are headquartered in BC, making it the 8th largest cluster in North America (ahead of New York, Seattle, Pennsylvania).[39] BC is the fastest growing and third largest biotechnology cluster in Canada.[40] The biotechnology cluster in BC had estimated revenue of almost $180 million in 2002 and employed 2,100 people.[41]

As of 2002, there were over 40 companies in BC developing pharmaceuticals and human health care products (therapeutics and genomic products) – all of which are located in either Greater Vancouver or Greater Victoria.[42]

Biotechnology research and development costs in Greater Vancouver averaged a 12% cost advantage relative to the US.[43]

With the sector in Greater Vancouver focused on health research it is increasingly being recognised as a centre of activity for biotechnology and life science companies as witnessed by its hosting of the prestigious 2003 *BioPartnering North America* conference (which was attended by 900 delegates from over 350 biotechnology companies from 22 countries).[44]

S2 **Burnaby**

Burnaby has a major hospital and a cluster of *biotechnology* and *life science* firms, including some well-known medium sized firms (Abgenix, CANTEST, Chromos Molecular Systems, Inex Pharmaceuticals, Protiva Biotherapeutics, Xenon Pharmaceuticals). There are also a number of firms present in Burnaby which specialize in medical devices (Acoustica, Mitroflow, Neil Squire Foundation, Response Biomedical, Saturn Biomedical Systems) and E-health (Telus, E-health Technology).

Courtesy of Xenon

Factors that have drawn *biotechnology* and *life science* firms to Burnaby include the availability of shared laboratory space, transportation for employees, founder's home or hospital association, and affordability of space.

SFU has been active in research and technology transfer for many years (ranked number one for the number of start-up companies per research dollar and ranked number two for the ratio of US patents per research dollar within Canada in 2002),[45] which has resulted in many spin-off companies (about one third being biotechnology/life science). SFU also recently launched a Biomedical Engineering program.

Courtesy of UDC @ SFU

Burnaby (continued)

SFU recently formed a new *Faculty of Health Sciences* to focus on population and public health, global health, and chronic and infectious diseases. Over the next four years SFU plans to hire over 60 new faculty members, and house research and teaching programmes at both the graduate and undergraduate level. All of this activity will be located in a new $47 million complex at the Burnaby campus. This new faculty at SFU promises to enrich the platforms for biotechnology, health and life science developments in the Greater Vancouver region.

BCIT has recently created a *Technology Commercialization Office*, linked with a stronger research effort. The *Technology Commercialization Office* helps BCIT researchers and their industry clients develop value from intellectual property through:

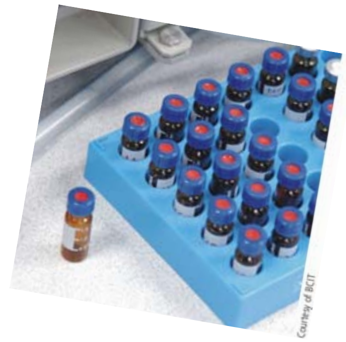
- Technology/market assessments;
- Intellectual property protection; and
- Developing commercialization strategies.

The TCO hosts a number of services to assist researchers and clients with the transfer of technology and to implement the management of confidential information.

These two institutions, in addition to Burnaby General Hospital, provide tremendous opportunities to promote the clustering of firms in Burnaby and the start-up of new firms.

S2 Trends

The *biotechnology, life science* sector is very complex with a long industrial development cycle - the average product is at least 10 years.[46] The more than 75% of companies in the BC sector have yet to reach their revenue generating stage[47] and 60% are more than six years old.[48]



Courtesy of BCIT

BC *biotechnology, life science* companies do more with less – more than 350 patents with the US Patent office (no other metropolitan centre has as many with such low levels of funding).[49] Although more than half of BC companies are private, this sector has the largest number of public companies reflecting their need to seek every source of funding possible.[50]

Courtesy of CANTEST

BC *biotechnology* revenues increased 88% between 2001 and 2003 (to $780 million)[51] and this sector continues to have strong growth potential increasing to $1.3 billion by 2010.[52] Although currently small in terms of revenue, companies in BC are generally large employers (33% employ more than 50 people).[53] Employment is expected to increase to 11,000 (more than five fold) by 2010.[54]

The *health care* field is likely going to experience increasing demand from a growing and aging population, but is also dealing with the financial and structural pressures that appear to have reached crisis proportions. Health care reform will likely be essential to ensure the Health Care system is sustainable.

Courtesy of LIDC @ SFU

Opportunities

Burnaby (and Greater Vancouver) competes with other centres in North America for biotechnology, health care, and life science firms, who rely on highly educated people. Highly educated people are attracted to *high-amenity communities* (see General Strategy G3-Creating Urban Character).

Health Care

Given the linkage between quality health care and general community attractiveness, and the more direct potential link between health care and biotechnology; maintaining a high quality of health facilities and services is in Burnaby's interest. Burnaby General Hospital serves all of Burnaby plus a large population in nearby parts of Vancouver, so it is a key regional facility that will continue to be a source of employment and potential source of spin-off companies.

Courtesy of LIDC @ SFU

Information technology (IT) may be a key means of reducing patient care costs and Burnaby could be in a strong position to build linkages between the hospital and the IT sector.

Health care services need to be closely matched to demographics, to avoid gaps or service voids. Good access to a strong continuum of health care (including family practitioners) could help to ensure Burnaby remains attractive to specific groups such as families or seniors.

Courtesy of Xenon

S2 **Opportunities (continued)**

Life Science/Biotechnology

Regions that have a high level of successful *biotech start-ups* tend to also have a high level of collaboration among hospitals, institutes, post-secondary education, government and business.

- *Universities* and *research institutes* are primary engines for life science innovation, so attracting institutes and building strong university programs are ways to accelerate this sector. SFU has been active in research and technology transfer for many years, which has resulted in many spin-off companies.

  SFU currently has a variety of active research areas and BCIT has a technology commercialization office. A stronger coordinated research effort between these two institutions, and Burnaby General Hospital, could provide tremendous opportunities to promote the clustering of firms in Burnaby and the start-up of new firms.

- *A strong hospital* is also a key attraction, as it offers clinical trial opportunities and potential for shared projects.

Other factors that have drawn firms to Burnaby include the *availability of shared laboratory space*, *transportation* for employees (see General Strategy G11 – Making Progress on Regional Transportation), founder's home or *hospital association*, and *affordability of space*.

S2
Biotechnology, Health, Life Science

Sector Action Plan

The City will undertake the following actions:

Short-Term

Post-secondary Funding
Look for opportunities to encourage and assist SFU and BCIT, in tapping a share of the provincial funds that have been allocated to establishing BC Leadership Chairs, at post-secondary institutions in areas including: medical, environmental, social, and technological research (note: this action is also listed in Sector Strategy S4 – Education).

Transportation
Look for opportunities to work with TransLink to:

- Improve the transportation connections between the hospital, SFU, BCIT, and major employment areas within Burnaby.
- Improve public transportation to better match employees' schedules (evenings and weekends), particularly routes serving business centres.

Demographic Analysis
Explore sharing demographic analysis and forecasts with local and regional health authorities, to help ensure that health services in Burnaby are well-matched to the needs of the population. In particular, anticipate the need for seniors' housing and seniors' care and make sure Burnaby is prepared.

Health Care Services for New Populations
Investigate how Primary Care Reform, Infoway, and other health care funding programs can best be used to the advantage of the population in Burnaby.

Seniors-oriented Housing
Continue to provide for the development of seniors-oriented housing in appropriate locations. Actively identify and market the areas chosen. Tie this into establishing Burnaby as "senior" friendly.

Support Services for Seniors
Look for opportunities to encourage the creation of new businesses or services that benefit from a concentration of seniors.

Short Term (continued)

Sector Profile
Explore using the City's website and publications to raise the profile of life science firms in Burnaby.

Economic Development Team
Consider ensuring that a member of the City's economic development team understands the life science, health, and biotech sectors and helps to enhance them through activities such as:

- Cataloguing firms, investors, and facilities such as specialized lab space in Burnaby.
- Keeping track of available small, affordable space suitable for start-ups and looking for ways to match suppliers with users.
- Being alert to opportunities to attract research institutes and new health facilities to Burnaby.

Networking
Look for opportunities to create networking opportunities for biotech and life science firms – firm to firm within the sector, firm to potential investors, and sector to IT sector.

Regional Marketing
Consider supporting regional efforts to communicate what Greater Vancouver has to offer relative to other locations globally (also see General Strategy G10 – Cooperating Regionally).

Medium Term

Burnaby General Hospital
Assess using the City's influence, in collaboration with SFU and BCIT, to ensure that Burnaby Hospital receives the funding it needs for ongoing facility, program, and services enhancements. Explore opportunities to add more specialized areas of practice at the Hospital.

Consider pursuing a four-party partnership between the City of Burnaby, Burnaby General Hospital, the Fraser Health Authority, and SFU, to make Burnaby a centre of excellence in health promotion and public health management, as well as a key location for biotech investment in chronic and infectious disease control.

Consider identifying possible major health and related technology facilities that can be located in Burnaby. This should be considered a priority and coordinated with Burnaby Hospital.

Consider promoting a wellness centre with geriatric care including physiotherapy, and naturopathic health (healthcare, wellness, and eldercare).

Medium Term (continued)

New Post-secondary Programs

Explore the potential to establish new health professional educational programs in Burnaby. Strengthen Burnaby General Hospital by developing area(s) of specialization. This effort should also focus on gaps in the regional services already being provided.

Geographic Centre

Consider examining the locations of life science firms, institutes, and health care facilities in Burnaby, to see if it is possible to work toward the creation of a geographic concentration for this sector. This effort should focus on gaps in the regional continuum of service wherever possible.

Ongoing

Inter-organization Collaboration

Look for opportunities to encourage further inter-organizational collaboration of Burnaby Hospital, SFU, and BCIT in the development and commercialization of new technology by the private sector.

S3: Film, Television, Digital Entertainment, New Media

Burnaby Sector Fact Sheet S3

Film, TV, Digital Entertainment, New Media

Example Businesses In Burnaby

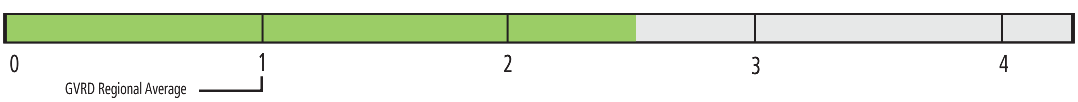
Film
Mammoth Studios
Bridge Studios
Canadian Motion Picture Park
Eagle Creek Studios
MJA Studios
UnReel Studios

TV
BCIT (training)
Global TV
Knowledge Network

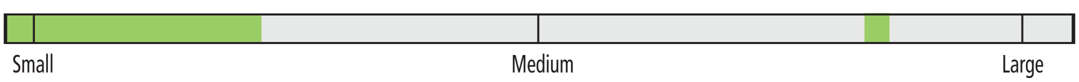
New Media
Art Institute Vancouver-Burnaby (training)
eBay
Electronic Arts
IBM

Where Sector Businesses are Clustered

Regional Competitive Advantage



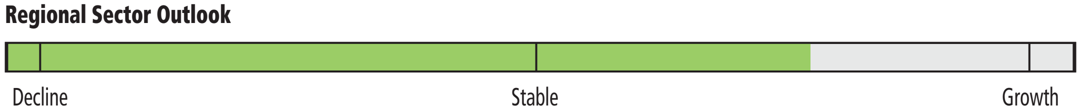
Typical Business Size



Stage of Sector

Seed ○　Emerging ● (New Media)　Expanding ● (Film/TV)　Transforming ○

Regional Sector Outlook



Film, Television, Digital Entertainment, New Media

S3 **Definitions**

"Film/television" includes all aspects of producing film and television products, including on-location filming, filming in studio facilities, post-production, and administration.

"New media" includes firms involved in interactive digital products (mainly software, but some hardware) in entertainment, education, and communications.

Sector Overview

The film/television industry is large at the global scale. BC is the third-largest film/television production centre in North America[55] (after Los Angeles and New York).[56] BC was home to almost 200 productions in 2004[57] and is witness to a maturing local industry with over 90%[58] of production crews being drawn from the 30,000 British Columbians directly employed by this sector.[59] These productions include feature films, television shows, movies-of-the-week, animation, documentaries,[60] and music videos.

Greater Vancouver is gaining an international reputation as being a new media hub with over 700 companies and 14,000 people generating an estimated annual revenue of $2 billion.[61]

S3 **Burnaby**

Burnaby is home to about two-thirds of the region's total studio space - six purpose built film studios (including the region's largest), two converted stages, and six commercial/special effect stages.[62] The City maintains a digital location catalogue with thousands of images of non-studio locations and has a full-time film coordinator who acts as a point-person for the film industry. This range of studio and location options are also supported by a full range of local film related support businesses.

People also come to Burnaby to train to work in these sectors, as it is also home to both the main campus for the Art Institute of Vancouver-Burnaby, which has programs in digital media arts and design, and British Columbia Institute of Technology's (BCIT) *Broadcast and Media Communications* program.

More recently, Burnaby has enjoyed growth in the "new media" sector, which includes interactive digital products in entertainment, education, and communications. While there are some large, high profile new media firms in Burnaby (e.g., Electronic Arts – the world's largest electronic game company which represents over 80% of the revenue for BC's new media cluster),[63] many of the jobs in this sector are in small firms. In turn, many of these small firms are in the start-up or research and development phase.

All of these creative elements clustered within our community have resulted in Burnaby being a major player in these sectors in BC.

Courtesy of Knowledge Network

Trends

The Canadian film and television industry has become heavily oriented to providing services (locations, labour, talent) to US productions choosing to shoot in Canada. In 2004, 73% of all BC film/ TV industry revenue were from foreign sources.[64] As a result, the industry is vulnerable to the value of the Canadian dollar, domestic American political pressure to stop "runaway" productions, and the priorities of the American industry, such as the recent emphasis on reality TV, that has reduced requirements for studio space.

Film/television competition is strong and national/ provincial policies have had to recently adapt quickly to negate tax incentives offered by other competing jurisdictions.

The new media sector is evolving very rapidly; small firms tend to want to cluster in places where there is a high potential for interaction with other new media firms. Employees in this sector are often young, educated people who commonly work long hours and these people tend to like environments where food, shopping, and entertainment are easily accessible 24 hours a day, seven days a week (24-7).

Both the film/television sector and the new media sector have strong prospects for growth in the North American economy and the global economy.

S3 Opportunities

Film

Making Canadian produced film and television more export-ready could decrease the local industries dependence on the American market and help to expand this sector. As a Federal government review of Canadian content limits would likely be required, this opportunity is beyond the scope of any one municipality.

The region has to be able to offer value-added production features and specialized creative elements, as it can not compete with other international jurisdictions outside of the US on the basis of cost alone.

The multiple municipal jurisdictions in Greater Vancouver often have different regulatory requirements which can appear confusing to outside producers.

Building awareness amongst City staff, as to the unique aspects of the industry as it relates to construction of temporary sets, and the harmonizing of Provincial and municipal regulations.

New Media

Currently, there is not a complete picture of the needs of new media companies and their workers, so it is hard to know what kind of actions would do the most to increase Burnaby's prospects (e.g., areas to promote company-to-company interaction, access to viewing theatres, short term office space requirements, personal services, food/beverage after 6:00 pm).

S3
Film, Television, Digital Entertainment, New Media

Sector Action Plan

The City will undertake the following actions:

Short-Term

A Good Place to Film
Consider a targeted effort to enhance a solid reputation for being a good place to make film and television productions, by being helpful.

- Continue to support and encourage on-location filming activities in the City.
- Maintain active contact with the BC Film Commission in promoting and facilitating filming projects.
- Participate in activities, associations, and events that will promote on-location filming projects and further industry facilities in Burnaby.
- Consider increasing the number of staff specifically assigned, if necessary, to these functions so they will develop an awareness of the industry.
- Adopt a smoother regulatory approach for traffic control, on-location shooting, and set construction.
- Explore with studios a coordinated approach to deal with peak studio-based parking demand (e.g., shuttle buses from central parking locations, possibly on City sites).
- Promote referrals through word of mouth within this industry.

Regional Marketing
Examine acting as an advocate for a stronger regional approach to marketing Greater Vancouver as a film and television centre and to advocate the interests of this sector. There is limited value in marketing as a solo municipality (other than the need to have a good reputation as a good place to do business).

On-location Regulations
Explore acting as an advocate for regional standardization of regulations regarding film and television on-location shooting. These issues could be revisited at the GVRD. This was seen to offer significant potential benefit even if this initially only involved a few major municipalities.

Short Term (continued)

Indigenous Film
Consider supporting a Federal government review of Canadian content limits (via the Federation of Canadian Municipalities) so that Canadian productions can become more export-oriented for sale to the larger international market.

New Media Needs Analysis
Consider undertaking a new media firm and employee needs analysis to determine what will be the most effective in drawing other new media firms to the area.

Short-term Office Space
Explore with realtors and property owners, the feasibility of maintaining an inventory of small spaces available for short term rental or that would be suitable for new media start-up firms.

Business-Education Synergies
Examine working with the Art Institute of Vancouver-Burnaby, BCIT, SFU, University of Phoenix and others, to encourage more interaction with both the film/television and new media sectors, to build synergy between education and industry in the areas of co-op education, exchanges, and/or technology transfer.

Medium Term

New Media Urban Village (Increase Mixed Use)
Look for opportunities to inject new uses in single-use employment areas, particularly ways to add live-work and flex office space that would appeal to small firms and start-ups. More specifically, the City should consider creating a new media urban village around the intersection of Willingdon/Canada Way, to create a focus for the large concentration of employees and students (Discovery Place, Slough Estates, BCIT, and Art Institute of Vancouver-Burnaby). See General Strategy G3 – Creating Urban Character for more detail.

Review Existing Zoning
Consider ensuring that zoning is flexible enough to allow all aspects of film/television/digital entertainment/new media (pre-production, production, post-production, duplication, handling) to occur on a single site.

Ongoing

Quality of Life
Pursue maintaining a high quality of life and high quality of environment in Burnaby and in the region, as it can be a powerful factor in attracting a strong labour pool, which in turn can attract choice companies to the area. See the General Strategy G1 - Building a Strong, Livable, Healthy Community for more detail.

Facilities Expansion
Continue to support the expansion of film and television studios and production facilities.

- Continue to work with land owners, developers and real estate representatives to identify potential opportunities to accommodate film/television and new media companies in Burnaby.
- Examine the benefits of promotional advertising in various film industry journals, directories and publications.

Industry Support
Pursue working in association with the BC Film Commission to maintain close contact with representatives in facilitating further expansion and growth in the industry.

Educational Programs
Look for opportunities to encourage the expansion of public and private educational programs in film, television, animation, and digital production.

- Strengthen and encourage programs which both support existing firms, and create new firms.
- Identify opportunities for co-op training programs involving partnerships between educational institutions and business.

S4: Education

Burnaby Sector Fact Sheet S4

Education

Example Institutions In Burnaby

<u>K-12</u>
Burnaby School District 41

<u>Educational Programing</u>
Knowledge Network (TV/web)

<u>Post-Secondary</u>
Art Institute of Vancouver-Burnaby (AIV)
British Columbia Institute of Technology (BCIT)
Simon Fraser University (SFU)
University of Phoenix (Burnaby campus)

Where Sector Institutions are Clustered

Regional Competitive Advantage

0 1 2 3 4

GVRD Regional Average

Typical Institution Size

Small Medium Large

Stage of Sector

Seed ○ Emerging ○ Expanding ● Transforming ○

Regional Sector Outlook

Decline Stable Growth

S4 **Definitions**

The "education" sector encompasses the public and private post-secondary educational institutions and the public and private K to 12 (and early childhood education) system.

Education

Sector Overview

Burnaby has an outstanding array of education assets including a strong public school system, two major post-secondary educational institutions (SFU and BCIT), and a variety of private institutions offering career, language, and other programs.

<u>K-12</u>

Burnaby School District 41 is the fourth largest school district in BC with a student population of 23,500.[65] This public school district has 40 elementary schools and 7 secondary schools.[66] The Burnaby School District offers a range of educational programs such as: French Immersion, Advanced Placement, International, Soccer and Hockey academies, alternative education, technology based education.[67] The Burnaby School District has a high school completion rate of 83% (five points higher than the Provincial average of 78%).[68]

Courtesy of UDC @ SFU

Although total Provincial public school enrolment has declined marginally from its peak in 1997/98[69], the Burnaby School District has seen a significant expansion since 1990, including:

- three newly constructed high schools; and
- a fourth recently been expanded.

Courtesy of BCIT

S4 <u>Post-secondary</u>

Burnaby has two of the top five largest post-secondary education institutes in BC.[70]

- British Columbia Institute of Technology (BCIT) has increased its enrollment by 40% since 1991, and now serves some 50,000 students.
- Simon Fraser University (SFU) has seen a 20% increase in annualized student enrolment over the ten year period from 1991 to 2001 to reach 22,000 students.

  SFU has also consistently placed in the top four in McLean's ranking of Canadian comprehensive universities.

  There has also been recent expansion of the academic campus at SFU (including a new Science and Technology Centre, a new Health Science building, a new research greenhouse, a new arts and social science building, a new student residence, and upgrades to sports fields and a gymnasium expansion).

Burnaby is also home to:

- Knowledge Network which delivers high quality educational programming to all British Columbians via TV and the Web with an inventory of more than 6,000 programs; and
- Some of BC's largest and most progressive private post-secondary institutions, including Art Institute of Vancouver-Burnaby (800 students), and the University of Phoenix (700-1,000 students at the Burnaby campus).


Courtesy of Knowledge Network


Courtesy of University of Phoenix

Courtesy of UDC @ SFU

Courtesy of UDC @ SFU

Courtesy of BCIT

Courtesy of BCIT

Trends

Enrolment in *K-12* has been increasing and some of the Burnaby School District's specialized programs are extremely popular (e.g., French Immersion – with over 5% of total enrolment).[71]

In an era where there is so much potential for knowledge based industries (information technology, communications, wireless, biotechnology, health care, life science, new media, and environmental technology), the impact of *post-secondary* education has become more important than at any other time[72] – more than 70% of projected employment openings in BC between 2001 and 2011 are estimated to be in occupations that will require some form of post-secondary training.[73]

There is potential for education related employment to grow faster than the local and regional populations, because of a need:

- to catch up on a shortfall of educational capacity;
- to meet market-driven demand for education related to career advancement; and
- to pickup the growth in the international student market.

Burnaby sees opportunities for the education sector to be a major force in Burnaby's social, cultural, and economic evolution – to create companies, to provide direct job growth, and to be an important attraction for business.

S4 Opportunities

K-12

Maintaining the quality of the public education system is a key ingredient to ensure Burnaby can attract and retain residents and businesses.

There are some opportunities for enhancing the system, which should incorporate both the need for system growth and the diverse requirements of students. It is also important to look at the needs of the whole family; particularly the needs of immigrants, including adult literacy, social support services, ESL, and adult education.

In doing so, the School District could use the City's help to obtain the resources for the following opportunities:

- *Special programs* that will appeal to some students and families, attracting them to Burnaby (e.g., special sports related programs such as hockey and soccer academies; French immersion; career oriented programs; special needs; English as second language (ESL); and gifted programs).
- Greater link*s* between the K to 12 system and the post-secondary institutions in Burnaby, for *program enrichment* and to provide additional resources to teachers.
- Partnerships between the School District, City, SFU/BCIT, and local clubs/organizations, to provide *better sports related* and *arts related facilities* that would benefit all students and the whole community.

Opportunities (continued)

Post-secondary

SFU, BCIT, and the private institutions offer tremendous opportunities to draw students, faculty, and new businesses. However, there is a perception that more could be done to build economy-enhancing relationships between post-secondary institutions and the business sector. While there is probably not much potential in Burnaby for market-driven relationships involving research and development aimed at "new knowledge", there appears to be a huge potential demand for the *application of knowledge and technology to business related problem solving*.

To tap the opportunities in this sector, there is a need to:

- Expand the application of knowledge and technology at the post-secondary level to include *business related problem solving*.
- Continue to *expand the capacity* of institutions.
- Continue to improve Burnaby's appeal as a place to study, by providing *quality programs* and all of the *support services* that students want including amenities, centres for excellence in sports, cultural activities, interesting urban environments, day care, and affordable housing.
- Embrace the increasingly *international and multicultural character* of Burnaby and the education market, so that diversity is valued and students feel welcome.

S4 **Opportunities (continued)**

Post-secondary (continued)

International students bring a rich diversity to the cultural experience of domestic students attending our institutions. International students can also assist in creating networks that can facilitate trade, tourism, and economic development.

There is an opportunity to capture more of these benefits by increasing the recruitment of international students to educational institutions within Burnaby, and fostering a broader international recognition of the educational assets located within Burnaby.

This could build on the strategic concentration of capacities at SFU and BCIT.


Courtesy of BCIT


Courtesy of LIDC @ SFU

S4
Education

Sector Action Plan

The City will undertake the following actions:

Short-Term

Burnaby Education Council
Consider working with the educational institutions to create a Burnaby Education Council, potentially including representation from the School District, BCIT, SFU, University of Phoenix, Art Institute of Vancouver-Burnaby, and others (Burnaby Board of Trade, BC Teachers' Federation – Burnaby), that would meet regularly to discuss areas of common interest and take on new initiatives. The City could provide a coordination function to this group (i.e., some staff support) in an effort to build stronger links between the educational institutions located within Burnaby.

* Other task(s) listed in this action plan that would likely benefit from the formation and assistance of a Burnaby Education Council have been marked with an asterisk.

Partnerships
Look for opportunities to encourage SFU and Burnaby School District to further their existing partnerships - to explore the degree of training and support that SFU currently provides to the Burnaby School District teachers, and to investigate what additional support could be delivered (mathematics, biology, geography, history, ESL, gifted).

Programs for International Students
Consider working with others to designate Burnaby as a key Canadian centre for international education.*

Explore helping the existing local educational institutions to clarify an overall response to the growing international student market. *

Consider encouraging the existing local educational institutions to form an inter-institutional International Student Coordinating Committee; potentially as a sub-committee of the Burnaby Education Council. If formed, this committee could address such issues as developing a coordinated housing registry for international students, and/or the potential to link international education with sports centres of excellence and academic centres of excellence (particularly given the timing of the 2008 Beijing Summer Olympics). *

Consider encouraging the existing local educational institutions to develop education-based connections with Burnaby's Sister Cities or other key target markets for international students. *

Consider encouraging the existing local educational institutions to form an International Education Focus Group to explore the issues around International Education. *

<u>Post-secondary Funding</u>
Consider encouraging and assisting SFU and BCIT, in tapping a share of the provincial funds that have been allocated to establish BC Leadership Chairs, at post-secondary institutions in areas including: medical, environmental, social, and technological research (also listed in Sector Strategy S2 – Biotechnology, Health Care, Life Science).

<u>Specialized Education</u>
Consider encouraging and supporting local educational institutions in their pursuit of specialized educational opportunities such as English as a second language (ESL), French immersion, and international education.

Explore recognizing the importance of good quality continuing adult education and job/career training in the creation and maintenance of a skilled, well-rounded labour force.

<u>Post-secondary Program Expansion</u>
Consider encouraging Knowledge Network, SFU, and BCIT to consider developing a Media Education and Training program as a centre of Excellence in Media Arts and Science.

Consider reviewing the criteria for gaming revenue, to allow for a portion of any unallocated annual gaming revenue to create and grow a "Burnaby Business Advancement Trust" endowment. This endowment could then be applied on a matching grant basis to fund local post-secondary research and application of business related problem solving in response to specific demands from the local business community.

<u>Promotion</u>
Consider emphasizing Burnaby's role as an important educational centre in any promotional materials that are produced about Burnaby – our schools and institutions are getting bigger and better!

Consider ensuring that promotional materials should refer to Burnaby's full range of educational resources, including its high quality K-12 system, post-secondary institutions, adult education programs, and other educational facilities and services.

In particular, consider promoting the continuum of business and not-for-profit support opportunities provided by the various post-secondary education institutions in Burnaby (i.e., technology support at BCIT, the pursuit of new knowledge at SFU, and business management training while you work at University of Phoenix).

Consider facilitating an agreement on a general format and target schedule (about once every two months) for regular news releases about exciting educational developments in Burnaby, to keep reinforcing Burnaby's desired image as a leading centre for education. *

Consider encouraging the potential members of the Burnaby Education Council to examine a coordinated approach to international marketing. *

Examine developing a high profile signage program to direct people to educational institutions and highlighting their locations within Burnaby.

<u>Co-op Employment</u>
Explore, as a major employer in Burnaby, taking a leadership role in working with SFU, BCIT, and private institutions to establish co-op employment programs and internships.

Consider the role the City can take in co-op on the job learning, and graduate student research into community development issues emerging from the Burnaby EDS 2020 and the Burnaby Education Committee. *

Look for opportunities to encourage an attitude among Burnaby businesses and industries that is favourable to co-op and internship programs.

Look for opportunities to assist in developing an integrated Burnaby Co-op Placement Program, with business and industry representation, SFU, BCIT, and the Burnaby School District.

Consider encouraging the potential members of the Burnaby Education Council, to undertake cooperative education program profiles of secondary and post-secondary institutions, business, and industry by developing and sharing "Partnership Connections and Reports".

<u>Municipal External Training</u>
To the extent possible, consider targeting external municipal training toward local institutions.

<u>Monitoring</u>
Explore allocating some economic development staff time to monitoring educational trends and issues in Burnaby, identifying opportunities, and networking.

Medium Term

Centres of Excellence
Consider encouraging the School District, SFU, and BCIT to take a collaborative approach (along with the City and with community-based organizations) in the creation of new facilities related to sports and the arts, with the intent of using resources more efficiently and of creating centres of excellence. *

Town Centre Campus(es)
Examine working with existing educational institutions to explore the potential to locate some appropriate programs in Burnaby's urban centres, such as Metrotown, to foster stronger links with business, industry, labour, and the community, to increase the profile of the institutions and of these urban centres.

A Community College
Consider exploring the feasibility of establishing a community college in Burnaby. The current network of colleges in the region has facilities in all of the major municipalities in Greater Vancouver except Burnaby.

Ongoing

Public Education
Continue to be a strong advocate for a high quality, adequately-funded public education system in Burnaby that meets the needs of all citizens, including pre-school, kindergarten to 12, and adult education.

Post-Secondary Program Expansion
Consider using Burnaby's influence to assist SFU and BCIT in their efforts to obtain provincial funding for expanding and improving their education infrastructure, capacity, programs (e.g., health care – see Sector Strategy S2), and services in Burnaby - particularly those that are, or can be, exceptionally high calibre and that are likely to create economic spin offs by attracting firms that will tap the facilities, faculty, and students as resources.

Look for opportunities to communicate to the Provincial Government, that Burnaby also recognizes the importance of higher education to British Columbia's and Burnaby's economic future, and in particular, point out that a commitment to excellence at BCIT and SFU is an important part of BC's economic, social, and cultural future and a key element of Burnaby EDS 2020.

S5: Environmental Technology, Services

Burnaby Sector Fact Sheet S5

Environmental Technology, Services

Example Businesses In Burnaby

Power Technology
- Azure Dynamics
- Ballard Power Systems
- Palcan
- QuestAir
- Teckion
- Xantrex

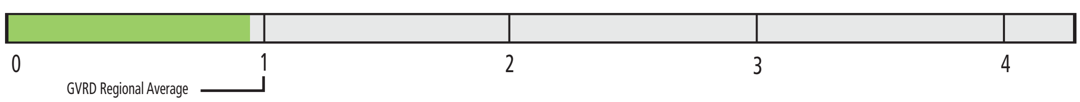
Environmental Services
- Associated Engineering
- BC Hydro (Strategic Asset Man.)
- CANTEST
- ECL Envirowest Consultants
- G3 Consulting
- M&R Environmental

Environmental Equipment
- Aquasmart Technologies
- International Water Guard
- IPEC Industries

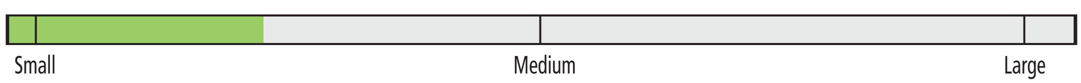
Alternative/Renewable energy
- Day4 Energy (solar)
- Montenay Inc. (waste-to-energy)
- Polar Battery (rechargeable)
- Syntec (bio-ethanol)

Where Sector Businesses are Clustered

Regional Competitive Advantage



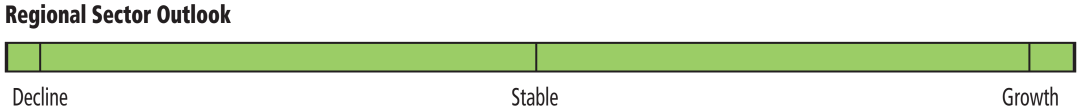
Typical Business Size



Stage of Sector

Seed ● (Alternative Energy)   Emerging ● (Env. Technology & Fuel Cells)   Expanding ○   Transforming ○

Regional Sector Outlook



Definitions

The "environmental technology, services" sector includes consultants, business owners, academics and corporations involved in some aspect of delivering the business of sustainability - alternative fuels, waste-to-energy, eco-industrial networking, green buildings, environmental engineering, planning, and management.

Sector Overview

Canada's environment industry earned $15.8 billion in revenues from environmental goods, environmental services and environment-related construction projects in 2002, up 8% from 2000.[74]

BC has the third largest provincial concentration of environmental businesses in Canada[75] which generate an estimated $2 billion in revenue[76] (13% of the national total).

75% or $1.5 billion of this revenue is generated by the approximately 200 firms in Greater Vancouver.[77]

This cluster of companies has many variable characteristics, from the mature environmental services industry to the rapidly expanding green building industry. Furthermore, the sectors are not necessarily distinct from broader business sectors. For example, companies specializing in green building are often established architectural, engineering or contracting firms. As such, many of their needs are similar to those of their conventional competitors.

The sector tends to be fragmented, as businesses tend to be small and businesses in different categories tend to not be aware of each other as potential collaborators. The service category is probably the most established and is focused on a local market. Manufacturing is small but growing and is necessarily targeted on national or international markets.

Courtesy of CANTEST

STORM WATER MANAGEMENT/Courtesy of UniverCity

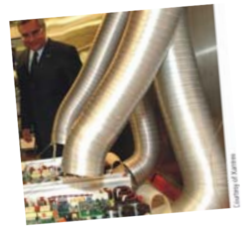
WASTE-TO-ENERGY/Courtesy of Montenay

S5 Burnaby

Burnaby already has:

- leaders in power technology - Azure Dynamics, Ballard Power Systems, Palcan, QuestAir, Teckion, Xantrex;
- a variety of green-related businesses in environmental services (such as assessment, engineering, remediation, water quality monitoring and treatment, waste management, and energy management) – Associated Engineering, BC Hydro (Strategic Asset Management), CANTEST, Coro Strandberg Consulting, ECL Envirowest Consultants, G3 Consulting, M&R Environmental;
- green building and development planning (including architects, engineers, contractors) – Eneready Products, Garibaldi Glass, Kask Brothers;
- alternative/renewable energy (including biofuels) - Montenay Inc. (GVRD Waste-to-Energy Facility);
- alternative transportation – TransLink, Coast Mountain Bus; and
- environmental equipment – International Water Guard, IPEC Industries.

Burnaby is also home to a number of companies who have shown tangible, visible examples of urban commercial/ industrial sustainability including Hemlock Printers (who use vegetable based inks and participate in eco-industrial networking to reduce waste), and ProOrganics (organic food distributors).



Trends

Although the domestic market still dominates, the Canadian export market has recently grown almost twice as rapidly as the domestic market. Industry Canada identified the following factors as key industry drivers:[78]

- Change in approach in meeting environmental obligations (increasing corporate responsibility);
- A shift in global economic forces (scarce resources);
- New broader regulations;
- Front-end focused legislation; and
- Voluntary initiatives.

Greater Vancouver has a global reputation as an environmentally friendly region which has been cited as converting into "instant credibility" in the field of sustainability and environmental technology, services.[79]

Greater Vancouver is also gaining an international reputation as a fuel cell cluster. Revenues for the fuel cell cluster alone are estimated to increase to $3 billion by 2010[80] (a 20 fold increase) with employment increasing to 10,000 by 2010[81] (an eight fold increase).

Courtesy of Azure Dynamics

At the local level the following trends were also identified:

- Users are increasingly demanding green buildings. The LEED standard is becoming widely recognized and employees and homebuyers are demanding healthy, sustainable buildings, as part of a general increase in demand for green and organic products.

- Supply chain changes are requiring businesses to be greener. Green procurement practices are increasingly common, sustainability is more than a buzz word, shareholder activists are requiring businesses to pay attention to environmental issues.

- Rising energy prices and growing concerns about global environmental conditions are forcing business to find green solutions.

- Standards are getting tougher and technology is responding. This creates demands for expertise and equipment.

S5 Opportunities

The trends noted on the previous page, combined with new, emerging technologies have provided significant opportunities for firms in this sector.

"Growing green" is a fundamental theme in Burnaby's Economic Development Strategy, not just because sustainable community development is the right thing to do in the face of limited resources and the need to reverse environmental degradation, but because there are major economic opportunities associated with alternative fuels, green building technology, clean-up technology, and environmental consulting.

There are two main "green" opportunities for Burnaby:

- Attracting businesses whose philosophies, business practices, and employees are environmentally-oriented.
- Attracting businesses that provide products and services that could be considered part of the green economy, such as green building technology or alternative fuels.

In terms of industry support, more could also be done to increase the scope of research and development work done at the two discovery centres – one near BCIT and the second adjacent to SFU on Burnaby Mountain – located within Burnaby.

S5
Environmental Technology, Services

Sector Action Plan

The City will undertake the following actions:

Short-Term

Networks and Alliances
Look for opportunities to work with SFU, BCIT, and other local green businesses to develop strong networks and alliances, create regular events, and explore ways to position Burnaby as a centre of green excellence.

Sector Specific Networking Events
Consider inviting key players from different sectors to discuss potentially beneficial links between them, and highlight successful Burnaby businesses, especially collaborations – winners like to be near winners (note: this action has also been listed in General Strategy G9).

- Help initiate a series of sector-focused meetings that focus on keeping the City and businesses within each sector in touch with each other;
- Maintain contact with individuals and associations within these sub sectors; and
- Liaise with SFU and BCIT and form deeper alliances with green business sector companies to maximize benefits of a three-way interrelationship between academia, business and government – utilize the important role universities play in this sector.

A Strategy Session for Key Stakeholders

Consider:

- Developing a clear "niche / excellence" strategy and what it would really mean to excel in this sector, and the "green" approach to all sectors; and
- Facilitating agreement on what the problem is, who the customer is, and what the targets are.

Short-Term (continued)

- Building a strategy to deal with success; and
- Establishing a "green infrastructure" strategy for the City that will ensure long term "green" performance and more optimized infrastructure performance.

Green Works
Look for opportunities to profile successful and innovative green businesses.

Green Firms
Examine cataloguing green firms and learning more about their requirements to see if there are gaps that the City can help address.

Medium Term

Research and Development
Consider working with the Province, SFU and BCIT to expand the opportunities and scope of research and development enterprise within the existing research and development parks (i.e., Discovery Parks Incorporated).

Consider making a major commitment to the expansion of the research and development sector in collaboration with Discovery Parks Incorporated and the Burnaby based educational institutions.

Marketing Plan

Consider creating a marketing plan that includes:

- A base line audit of perceptions and attitudes towards Burnaby among employees and owners of companies;
- An external audit of how Burnaby is referred to in regional marketing material;
- An industrial survey to understand existing Burnaby based "green" businesses and establish a baseline / reporting process;

Medium –Term (continued)

- A better understanding of what "local business neighbourhoods' are in competition with and address a strategy to deal with the issues identified;
- A baseline to measure growth against; and
- Opportunities to showcase products.

<u>A Communications Plan</u>

Consider creating a communications plan which could include elements for:

- Internal (inside Burnaby) to employees and business owners;
- External (outside Burnaby) in the local events that business owners request (VEF, Globe);
  - Tradeshow booth on Burnaby – show names of companies in Burnaby and show neighbourhoods;
  - This builds advertising for the companies and Burnaby at the same time; and
  - Burnaby has to assist in "branding the region" but work on Burnaby's aspects specifically.

Ongoing

<u>Programs</u>

Continue to support existing programs.

Consider adopting new programs that will clearly signal that the City is a leader in sustainability and green technology, such as:

- *Solid waste reduction* – continue to maintain gains in solid waste reduction already achieved (e.g., exceeding regional solid waste management plan targets) and strive to enhance City's collection services.
- *Energy* – consider developing a Burnaby energy policy; adopt a vehicle procurement policy aimed at energy reduction.
- *Green Buildings* – consider adopting LEED standards/principles for civic buildings; consider adopting an incentive program.

S6: Tourism, Sport/ Tournaments, Arts/Culture, Retail

Burnaby Sector Fact Sheet S6

Tourism, Sport/Tournaments, Arts/Culture, Retail

Examples In Burnaby

Attractions
Burnaby Art Gallery
Burnaby Express
Burnaby Lake Sports Complex
Burnaby Village Museum
Deer Lake Amphitheatre
8 Rinks
Hart House
Hilton Vancouver Metrotown
Horizons
Metropolis at Metrotown
National Nikkei Heritage Centre and Gardens
Whitecaps Football Club

Spectacular Parks
Burnaby Mountain
Barnet Marine
Burnaby Lake
Deer Lake
Fraser Foreshore

Festivals
Burnaby Blues and Roots Festival
Symphony in Park
Festival of Lights

Where Sector Businesses are Clustered

Regional Competitive Advantage

0 1 2 3 4

GVRD Regional Average

Typical Business Size

Small Medium Large

Stage of Sector

Seed ○ Emerging ○ Expanding ● (Tourism) Transforming ● (Retail)

Regional Sector Outlook

Decline Stable Growth

S6 Definitions

The "tourism, sport/tournaments, arts/culture, retail" cluster encompasses a diverse group of activities and businesses, but all share the following two characteristics:

- All are associated with facilities, programs, or experiences that enhance the quality of life for Burnaby residents and so help to draw new residents and new businesses to Burnaby.
- All of them import dollars into the local economy from the rest of the metropolitan area and from outside the region.

For this reason, this Strategy treats these diverse uses as a group of related economic development opportunities.

Sector Overview

BC had almost 22 million overnight visitors in 2003 who spent almost $9 billion.[82] In 2001, tourism was BC's third largest source of export revenue ($4 billion in foreign exchange) – export because it is bringing revenue into the province.[83]

Almost 8 million overnight visitors travelled to Greater Vancouver and spent over $3 billion in the region on accommodation, shopping, restaurant meals, groceries, transportation, attractions, recreation, and entertainment in 2003.[84] This spending resulted in over 85,000 people being employed in the tourism sector in Greater Vancouver in 2003.[85]

S6 Burnaby

Burnaby has a number of attractions:

- Metropolis at Metrotown – Canada's second largest shopping, dining and entertainment complex, attracts 25 million visits per year;[86]
- Burnaby Village Museum - over 130,000 people attended in 2004 (one of only three tourist destinations in the top ten Greater Vancouver busiest tourism destinations located outside the City of Vancouver).[87]
- Hat's Off Day in the Heights – an estimated 40,000 people attended this one-day event in 2005;
- a cultural precinct – 10,000 natural seat amphitheatre, Burnaby Village Museum, Shadbolt Cente for the Arts, and Burnaby Art Gallery;
- a number of regional outdoor cultural festivals - Burnaby Blues and Roots Festival, Symphony in Park, Festival of Lights, Discovery Days, and Rhododendron Festival;
- a Junior "A" hockey club – the Burnaby Express;
- Burnaby Central Railway – miniature railway that is open to the public for rides at certain times of the year;
- Hilton Vancouver Metrotown – a four star/ four diamond hotel with over 280 rooms;[88]
- wonderful restaurants in spectacular settings – Hart House, Horizons;

Courtesy of Metropolis

Courtesy of Burnaby New Westminster NewsLeader

Courtesy of Burnaby New Westminster NewsLeader

Courtesy of UDC @ SFU

- world class sports facilities - 8 rinks, Burnaby Lake Sports Complex West with its artificial fields;
- a number of spectacular natural parks - Barnet Marine, Burnaby Mountain, Burnaby Lake, Deer Lake, Fraser Foreshore.

Burnaby's success as a sports tournament destination was galvanized with the award of the 2009 World Police / Fire Games – second in participation only to the Summer Olympics.

S6 Trends

Courtesy of UDC @ SFU

BC is close to major populations which are expected to be tourism drivers – China, India, and the west coast of the US. As of October 2005, BC had captured 57% of the year-to-date total Asia/Oceania trips to Canada (over 760,000).[89] The World Tourism Organization has said that China will be the biggest source of tourists in the world by 2020. India is also forecast to be a major tourism market by 2050.

Courtesy of Burnaby New Westminster NewsLeader

BC is a playground for outdoor adventurers who want to build their vacations around athletics. The rest of the world will likely increasingly view BC as a sports destination in the lead-up to the 2010 Olympics.

SFU has significant plans for the development of athletics facilities and for maintaining its role as one of the premier athletic training/sports science institutions in the country. SFU also plans to expand activities in theatre arts and music, as well as renewed investment in its galleries and museum.

Courtesy of UDC @ SFU

Community accessibility will also likely be increasingly important as age is becoming less of a deterrent to travel.[90]

Courtesy of UDC @ SFU

Opportunities

The foundation for the tourism-related component of the Economic Development Strategy is a realistic understanding of Burnaby's ability to attract visitors from outside the City, recognizing that Burnaby is not a major destination on its own and is one community within a metropolitan region that is dominated by the "Vancouver" brand.

In the absence of a major capital budget to create attractions that are capable of national or international scale impact, Burnaby's focus should be on ways to get visitors already in the region to spend time and money in Burnaby. This suggests that the tourism strategy needs these elements:

- Strengthening Burnaby's image and identity within Greater Vancouver.
- Adding the facilities, events, marketing and other elements that will cause people within the region (tourists or residents) to spend time in Burnaby. This could include supporting the efforts of Tourism Burnaby.

S6 Opportunities (continued)

The main visitor target markets that present opportunities for Burnaby are:

- *Residents of Greater Vancouver* who can be drawn to Burnaby for shopping, recreation facilities, parks, arts/culture, entertainment, and meetings.
- *Out-of-region visitors* to the Vancouver area, who can be attracted to include Burnaby as part of their visit, whether it be a day trip or overnight stay.
- *Sports/tournament groups* attending training camps and events in Burnaby or elsewhere in Vancouver.
- *People visiting* friends and relatives in Burnaby.

Courtesy of UDC © SFU

Courtesy of Larry Wright/BurnabyNOW

S6
Tourism, Sport/Tournaments, Arts/Culture, Retail

Sector Action Plan

This action plan is divided into components for general tourism, sports/tournaments, arts/culture, retail, meetings/conferences, and major events.

General Tourism

Burnaby has high quality attractions that can draw visitors, such as a large and diverse retail inventory (including Metrotown), parks, major educational institutions, Burnaby Village Museum, and Shadbolt Centre. However, Burnaby does not have a strong, identifiable image for visitors and its attractions tend to be spread out and poorly connected. Not much is done to market Burnaby, but there is a new organization (Tourism Burnaby) that may be able to make progress in this area.

The City will undertake the following actions:

Tourism Burnaby

Consider encouraging and supporting Tourism Burnaby in developing and adopting a ***strategic plan*** that will define its mandate, adopt an action plan for the next several years, and delineate the "fit" between its role and the roles of the Burnaby Board of Trade, and the City of Burnaby's Economic Development functions.

Look for opportunities to assist Tourism Burnaby in improving Burnaby's image as an ***in-region tourism destination***, perhaps through more consumer information, marketing and promotion and perhaps by agreeing to designate Burnaby as the "Capital of Canada" for an appropriate theme, as some communities have done with tournaments or fishing, for example.

Consider encouraging and assisting Tourism Burnaby in developing ***a strong, informative web site*** with links to tourism, conference facilities, sports venues, and other points of interest in Burnaby.

Look for opportunities to work with Tourism Burnaby to ensure that ***printed information*** about Burnaby's attractions is prominently displayed at visitor information centres throughout BC.

Look for opportunities to work with Tourism Burnaby to develop a direction and ***information signage program*** highlighting key destinations/attractions within the City.

Existing Assets

Consider placing an emphasis on enhancing and building on the assets Burnaby already has, rather than hoping for the creation of some major new visitor attraction in Burnaby.

Sports related tourism is a major opportunity for Burnaby because of its central location, accessibility, and the number and quality of indoor and outdoor recreation facilities. This is an attractive market because it is mainly domestic and is easy to target.

There are some constraints to growth including insufficient supply of affordable accommodation, capacity limitations for some sports facilities (which have high resident utilization), limited vacant land for new facilities, strong competition from communities such as Kelowna and Kamloops, and a weak approach to marketing.

The City will undertake the following actions:

Destination Facilities

Consider developing a strategic plan to develop select destination athletic and recreation facilities in tandem with SFU.

Consider leveraged investments to build on SFU's claims to provincial and federal revenues in support of athletics and recreation facilities.

Promotion

Consider promoting Burnaby as a good location for provincial or national training centres for sports that involve international competition. Rowing is one sport for which Burnaby is particularly well suited (with Burnaby Lake and SFU), but there are likely others as well.

Accommodation

Consider encouraging the development of additional moderately priced accommodation:

- Working with SFU and Tourism Burnaby to take full advantage of seasonal and year-round tournament accommodation available at SFU.
- Work with Tourism Burnaby to promote billeting and the availability of bed and breakfast accommodation.

Collaboration

Examine seeking collaboration between SFU, BCIT, the School District, the City and community sports organizations, to rationalize their sports facilities planning and establish centres of excellence for training and tournaments.

Sports Tournament Bookings

Consider advising Tourism Burnaby when major events and/or tournaments are booked in City facilities to allow for the distribution of information packages, and marketing materials.

Consider assisting Tourism Burnaby in the development of information packages, marketing materials and booking procedures to increase the number of sports tournament events in Burnaby.

Burnaby has a unique combination of museum and arts facilities at the Deer Lake complex, but these tend to be oriented to residents and are not aggressively marketed to visitors. Burnaby also has a variety of potential themes that could form the basis of attracting visitors, including multicultural character, technology, film/television, outdoor art, history and horticulture. There are some possibly unique opportunities to weld some of these themes, such as the use of high tech interactive approaches to portray Burnaby's history or the involvement of the film/television industry in arts/cultural events.

The City will undertake the following actions:

<u>Arts/Cultural Facilities</u>
Look for opportunities to collaboratively develop regional destinations for tourists, residents, and students:

- Pursue opportunities to enhance existing arts/culture facilities (e.g., Burnaby Village Museum) and develop new ones (e.g., technology, film/TV, outdoor art, gardening).
- Consider leveraged investments to build on SFU's claims to provincial and federal revenues in support of cultural facilities.
- Look for opportunities to promote heritage related activities and attractions (e.g., Heritage Walking Tour at Deer Lake, National Nikkei Heritage Centre, Museum of Archaeology and Ethnology).

<u>Gathering Places</u>
Explore supporting the mixing of arts/culture (e.g., art galleries, street parties, plaza gathering places) with retail areas to further humanize these places (i.e., introduce more opportunities for intimate situations).

<u>Profile</u>
Consider increasing the profile of the arts in Burnaby by sponsoring arts/culture events and looking for ways to add arts-related components to other tourism initiatives.

Continue working on shifting more of the region's arts/culture concentration away from Downtown Vancouver, by creating more high profile events in Burnaby, such as symphony performances, festivals and concerts.

Examine working with the ethnic communities on ideas for ethnic-themed celebrations of regional interest.

Burnaby has a large and diverse retail base that could be used more as an attraction for visitors from inside the region and elsewhere. There are opportunities to use ethnic and cultural diversity as themes for food, art, fashion, markets. Burnaby's position on two rapid transit lines provides a high level of access to Burnaby's retail concentrations.

The City will undertake the following actions:

High Streets

Consider promoting the variety and different character of all of the Town Centres and retail villages within Burnaby (e.g., The Heights, North Road, UniverCity, Edmonds, Brentwood, Lougheed, and Metrotown).

Explore working with local merchants and business associations on plans to strengthen commercial districts through marketing, streetscape improvements, design guidelines, and the development of more interesting, distinct character.

Look for opportunities to work with the ethnic communities on ideas for more ethnic-themes unique to each area.

Streetscape/Quality of Experience

Continue to reinforce Burnaby's town centres as region-serving lively retail centres. More attention needs to be focused on streetscape and quality of experience. See General Strategy G3 – Creating Urban Character for more detail.

Look for opportunities to locate cultural, civic, and educational uses in town centres.

Tourist in Your Own Town

Consider encouraging Tourism Burnaby to develop a "tourist in your own town" program to encourage residents to be local tourism boosters.

Burnaby is in a good position to attract meetings and conferences with a mainly regional target market. Significant additions to hotel and meeting facilities have been made in the last decade.

The City can work with Tourism Burnaby and local hoteliers to increase Burnaby's share of this market.

The City will undertake the following actions:

Major Events
Consider taking a leadership role in helping to attract regional or provincial scale events to Burnaby for which the City has some influence, such as local government related conferences and annual general meetings.

Meetings and Conferences
Explore assisting Tourism Burnaby, the Burnaby Board of Trade, and industry associations in attracting economic sector related meetings and conferences to Burnaby.

Explore the potential for SFU and BCIT to offer conference facilities and leverage their staff's specialized expertise as the reason to bring events to Burnaby.

Information Packages
Work with Tourism Burnaby to ensure that Burnaby is well-equipped with information packages (meeting venues, accommodation, amenities) to help event planners and meeting attendees.

Venues
Consider making City facilities available as venues for meetings, receptions, and other events.

Consider working with the Burnaby School District to develop an inventory of business support venues (e.g., Shadbolt Centre for the Arts, Michael J. Fox Threatre).

Major Events in 2009 and 2010

There will be opportunities to use the 2009 World Police and Fire Games, and the 2010 Olympics, to enhance tourism in Burnaby. Burnaby clearly needs a detailed plan to use these two events to maximum advantage and the City believes this should be a priority of Tourism Burnaby. The City will undertake the following actions:

Detailed Plan

Look for opportunities to collaborate with Tourism Burnaby and the Burnaby Board of Trade, to develop a detailed plan for tapping the opportunities of the 2009 World Police and Fire Games, and the 2010 Olympics. There are many ideas or opportunities that can be explored, such as:

- Using the media spotlight to increase Burnaby's profile through means such as vignettes focusing on famous Burnaby personalities and places.
- Using Burnaby's multicultural character and heritage assets, to attract ethnic visitors to major events or for hosting athletes and families from various cultural backgrounds.
- Building a stronger spectator, television, and/or web-cast audience market for the Police and Fire Games (which has tended to not be a spectator/television event), to create opportunities to highlight Burnaby.
- Sponsoring a documentary on the Police and Fire Games that would highlight Burnaby's role in attracting and hosting the event.
- Creating artistic or cultural events in conjunction with the Olympics, and the Police and Fire Games.
- Planning a major parade or band competition as part of the Police and Fire Games, capitalizing on the fame of the SFU Pipe Band and recognizing that many police and fire departments have marching brass or pipe bands.
- Adding or enhancing recreation/training facilities with legacy athletic and/or cultural benefits.
- Using these major events to encourage the construction of additional hotel accommodation.

There may even be an opportunity to use these games to showcase Burnaby's ability to host such events; leading to repeat events in Burnaby such as the BC Games, Canada Games or Commonwealth Games. These are simply ideas to illustrate potential. It is essential to develop a plan that chooses and implements specific steps to tap these rare opportunities.

S7: Finance, Management, Professional Services

Burnaby Sector Fact Sheet S7

Finance, Management, Professional Services

Example Businesses In Burnaby

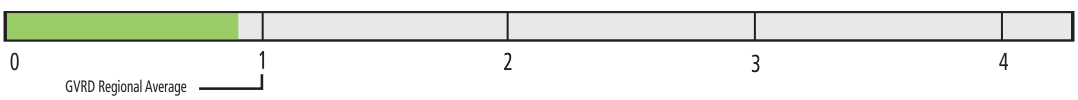
Finance/Insurance
G & F Financial Group
Greater Vancouver Credit Union
HSBC Bank Canada
Pacific Blue Cross
Travelers Financial Group

Management
IBM Business Consulting Services
Future Shop/Best Buy

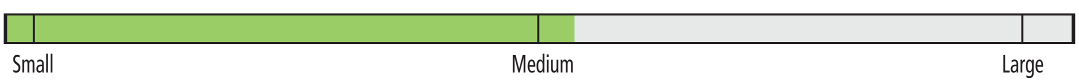
Professional Services
APEG BC
Automotive Retailers Association of BC
Hospital Employees' Union (HEU)
HLB Cinnamon Jang Willoughby

Where Sector Businesses are Clustered

Regional Competitive Advantage

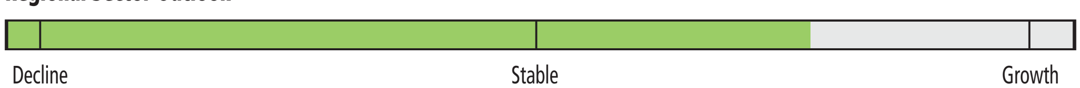


Typical Business Size



Stage of Sector

Regional Sector Outlook



Finance, Management, Professional Services

S7 **Definitions**

The cluster includes companies involved in those industries listed in the title – finance, management, professional services. This financial sector consists of three main industrial groups - banking, insurance, and securities.

Sector Overview

Although most financial service sector activity in Canada takes place in Toronto[91], finance/ insurance/ leasing was the fifth largest employment cluster in BC in 2004 – employing 95,700 people.[92]

Burnaby

Burnaby's regional centrality, access to the regional road network and two rapid transit lines make it an excellent location for business, government, and institutional offices.

Burnaby offers high density urban environments, including Metrotown, as well as excellent business centre locations for firms that need larger floor plates, road access, or a combination of functions such as office, lab, manufacturing, service, and distribution.

Burnaby is home to a number of notable large companies and not-for-profits in this sector – Pacific Blue Cross, HSBC Bank Canada, as well as a broad range of smaller firms in this cluster.

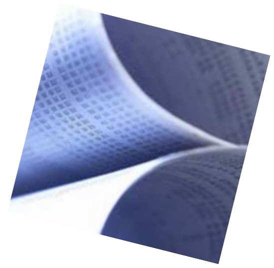
S7 Trends

Canadian Banking trends

All of the large Canadian banks are actively pursuing the U.S. and international markets in an attempt to build economies of scale to compete against large international institutions.[93] Each of the top eight banks in the world are each worth as much or more than all of the Canadian banks combined, and Canada's largest Canadian bank, the Royal Bank, ranks 55th in the world.[94]

Canadian Securities trends

The realignment of Canadian stock exchanges was one of the most recent changes to the Canadian securities market.[95] Moreover, the merging of international exchanges could consolidate the strength of the world's dominant players, threatening the existence of the smaller exchanges around the world.[96]



Canadian Insurance trends

The insurance industry has been consolidating due mainly to demutualization of the industry.[97] Many of the insurance companies have broadened their scope, increased their scale, and decreased costs by consolidating.[98]

Opportunities

While Burnaby will not likely be on a scale to compete head-to-head with Toronto or downtown Vancouver in this sector Burnaby does have some aspects and amenities which make it an attractive head office location for some.

S7
Finance, Management, Professional Services

Sector Action Plan

The City will undertake the following actions:

Short-Term

<u>Retention</u>
Consider contacting existing local firms within this sector to discuss any issues which may be of importance or concern to them. Act on the outcomes, if required.

Medium Term

<u>Municipal Town Centres</u>
Explore ways to increase the vitality of Burnaby's other town centres (Brentwood, Lougheed, Edmonds), and business centres.

Ongoing

<u>Metrotown</u>
Continue to reinforce and promote Metrotown as the pre-eminent Regional Town Centre.

<u>Government Agencies/Institutional Uses</u>
Look for opportunities to encourage region-serving government agencies and institutional uses to locate in Burnaby.

S8: Light Industry, Warehousing/ Distribution

Burnaby Sector Fact Sheet S8

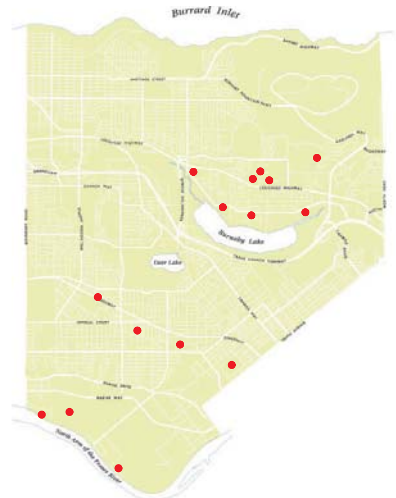
Light Industry, Warehouse/Distribution

Example Businesses In Burnaby

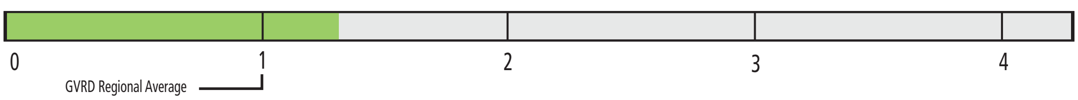
Light Industry
Eneready Products
Haida Forest Products
Hemlock Printing
Garibaldi Glass
Quest Air
NORPAC Controls
Robeez
Saputo (formerly Dairyworld)
Swiss Water Decaffeinated Coffee
Weiser Lock

Warehouse/Distribution
BC Bearing Group
Grand & Toy
Golden Boy Foods Limited
Horizon Distributors
HY Louie
Summit Logistics (Safeway)
Taiga Forest Products

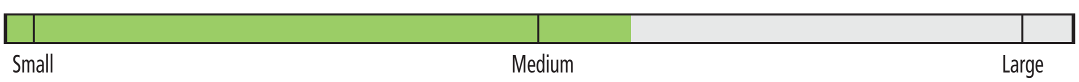
Where Sector Businesses are Clustered



Regional Competitive Advantage



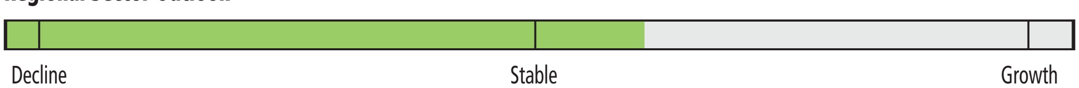
Typical Business Size



Stage of Sector

Seed ○ Emerging ○ Expanding ○ Transforming ●

Regional Sector Outlook



Light Industry, Warehousing/Distribution

S8

Definitions

"Light industry" involves manufacturing activities that use moderate amounts of partially processed materials to produce items of relatively high value for their weight.

"Warehousing/distribution" companies are involved in the movement of goods.

ROBEEZ/Courtesy of Burnaby-New Westminster NewsLeader

Sector Overview

Manufacturing is the second biggest industrial sector in BC in 2002.[99] Manufacturing accounts for about 11% of the BC economy and employs over 206,000 people in BC.[100] Manufacturing has the highest economic multiplier of any business sector in BC.[101]

Courtesy of NORPAC Controls

The BC manufacturing community develops leading edge products, technologies, and services for customers in Canada and throughout the world. A great many of these firms are involved in "value-added sectors" like machinery & equipment, aerospace, electronics, plastics, food and beverage, telecommunications, engineering and environmental services.

Six out of every 10 *manufacturing* jobs in BC are located in the Lower Mainland/Southwest region of the province.[102]

Warehousing/distribution was the fifth largest industrial sector in BC in 2002[103] and employed over 130,000 people in BC in 2004.[104]

Courtesy of NORPAC Controls

S8 Burnaby

Courtesy of NORPAC Controls

Burnaby is home to a number of large light industrial companies - Eneready Products, Hemlock Printing, Garibaldi Glass, Quest Air, NORPAC Controls, Robeez, Saputo (formerly Dairyworld) – as well as a range of smaller, more specialized companies - Country Roots (furniture maker), Humble Manufacturing.


HAIDA FOREST PRODUCTS/Courtesy of Larry Wright/BurnabyNOW

Historically, Burnaby has been an important warehousing/distribution centre in Greater Vancouver because of its geographically central location, supply of developable land, and access to the regional major road network. Companies within this group would include Grand and Toy, Summit Logistics (Safeway Canada).

Trends


Courtesy of NORPAC Controls

BC's *manufacturing* and exporting community has undergone some very significant changes over the last few years, driven primarily by changes in world markets and customer expectations. These companies are recognized globally for their innovative product and service excellence.[105]

The value of goods produced and shipped by BC manufacturers was up 12% in 2004, and was expected to reach $41.7 billion by the end of 2005 – the strongest rate of growth since 2000.[106]


WEISER LOCK/Courtesy of Larry Wright/BurnabyNOW

Trends (continued)

Several factors are diminishing Burnaby's strength as a centre for *warehousing/ distribution:*

- There is less vacant land available to accommodate growth and the remaining land is increasing in price.
- Traffic congestion is increasing on major routes, in effect diminishing the advantage of being central. Coupled with rising land values, this is shifting the region's light industrial focus east into the Fraser Valley.
- There is a trend to moving goods directly from point of arrival in the region to point of use, reducing the need for intermediate storage/distribution functions.
- There is a trend to high density, automated warehousing that involves very heavy site loading for which Burnaby's soils are less suitable than in some other areas in Greater Vancouver.

For these reasons, Burnaby should probably not anticipate much growth in warehousing/ distribution, especially for distribution aimed at Western Canada; although Burnaby does continue to have advantages for the warehouse sector aimed at serving the metropolitan area.

GRAND AND TOY

S8 Opportunities

Burnaby will need to find ways to use the remaining industrial land inventory more intensively and ensure that the remaining vacant land is used by firms which meet/exceed an acceptable employment density.

S8
Light Industry, Warehousing/Distribution

Sector Action Plan

The City will undertake the following actions:

Short-Term

Regional Transportation Planning
Consider taking a leadership role in regional transportation planning, with an emphasis on freeing up capacity for goods movement.

- Explore ways to improve north-south links within the City.
- In association with the Ministry of Transportation, explore ways to make highway capacity available for goods movement.

The Right Message
Look for opportunities to communicate the rationale for seeking the "right kind" of industrial users that is appropriate to the community, and threshold industrial employment densities to ensure that Burnaby is perceived as open for business and interested in growth.

Medium Term

Sector Diversity and Intensity
Continue to place importance on maintaining a diverse light industrial sector, as this helps to provide a wider range of employment opportunities for people with different skill levels and occupations. Burnaby will do what it can to alleviate transportation constraints on light industry, and will try to find ways to increase the intensity of use of light industrial land; particularly in the Big Bend which contains most of the City's remaining inventory of vacant land for light industrial development.

Medium Term (continued)

Consider guiding transitions so that mixed use, higher density development includes room for "replacement" employment as well as new housing. This replacement employment will not, of course, be in the same economic sector as the previous land use, but it will help Burnaby maintain its capacity to accommodate jobs (note this action also appears in General Strategy G2 – Making Efficient Use of Land).

Affordable Housing
Look for opportunities to maintain a diverse resident workforce. Burnaby will have to work hard at providing the right proportion of affordable housing.

Ongoing

Industrial Land Inventory
Continue to look at its land use policies regarding allowable uses on remaining vacant or redeveloping lands, to ensure that singular office or retail uses are not putting undue pressure on the light industrial land inventory.

S9: Heavy Industry

Burnaby Sector Fact Sheet S9

Heavy Industry

Example Businesses In Burnaby

Heavy Industry
Chevron Canada
Esso
Shell
Kinder Morgan Canada (formerly Trans Mountain Pipeline)
Petro Canada

Where Sector Businesses are Clustered

Regional Competitive Advantage

0 1 2 3 4

GVRD Regional Average

Typical Business Size

Small Medium Large

Stage of Sector

Seed Emerging Expanding Transforming

Regional Sector Outlook

Decline Stable Growth

Heavy Industry

S9 Definitions

"Heavy industry" is capital intensive, requires a larger fixed facility, and often has a larger environmental impact than light industry. Heavy industry manufacturing activities can involve the conversion of large volumes of raw materials and partially processed materials into products of relatively low value for their weight (with some or all of its operations being outdoors). These processes can require large and expensive machinery, and often consume large amounts of energy.


Courtesy of Chevron Canada

Sector Overview

Heavy industries in BC (forestry, fishing, mining, oil/gas) employed over 35,000 in 2004.[107]


Courtesy of Chevron Canada

Burnaby

Burnaby's only large, heavy industries are the petrochemical refinery and storage facilities on Burrard Inlet and the south slope of Burnaby Mountain.

Burnaby benefits from the employment diversity that these operations offer and from their contribution to property tax base. The Strategy assumes they will remain for the foreseeable future and advocates the continuation of a constructive working relationship with an emphasis on finding ways to reduce impacts on surrounding communities and the environment.


Courtesy of Chevron Canada

S9 **Trends**

Within Canada, no new refineries have been constructed since 1980.

The Federal government will likely continue to change the specifications for vehicle fuels to reduce emissions.

The refinery industry has been undertaking almost continuous upgrades to meet safety, environmental, and emission regulations.

Most of the existing heavy industrial uses in Burnaby (refineries and storage tank facilities) are likely to remain in Burnaby for the long term because there is a large investment in the refining, storage, and pipeline infrastructure.

Burnaby is a good location for regional product distribution, and the potential cost of remediating could reduce the potential lift in land value from a change of use.

Opportunities

If any of the sites become candidates for alternative uses, Burnaby should try to make sure that the total employment-accommodating capacity of the lands is not diminished; possibly by looking at mixed use development alternatives that include office, retail, and high quality light industry, as well as residential.

S9
Heavy Industry

Sector Action Plan

The City will undertake the following actions:

Short-Term

New Technology
Consider working with heavy industries to encourage the implementation of new technologies that reduce environmental impact.

Continued Presence
Look for opportunities to work with heavy industries to identify and address impacts on local communities.

Medium Term

New Technologies
Consider encouraging the mixing of old industries and new technologies (i.e., pilot projects or the mainstream production of alternative fuels).

Mixed Use – Replacement Employment
Examine guiding transitions so that mixed use, higher density development includes room for "replacement" employment as well as new housing. This replacement employment will not, of course, be in the same economic sector as the previous land use, but it will help Burnaby maintain its capacity to accommodate jobs (note this action also appears in General Strategy G2 – Making Efficient Use of Land; and Sector Strategy S8 – Light Industry). Given the size of the sites being used for heavy industry, redevelopment (when it occurs) should be done in accordance with sustainable development principles.

Ongoing

Remediation and Transition

Continue to work with owners on remediation and transition where land is no longer required for the original industrial purposes.

S10: Agriculture

Burnaby Sector Fact Sheet S10

Agriculture

Example Businesses In Burnaby

Agriculture
Market Gardens
Mayberry Farms
ProOrganics
United Flower Growers Cooperative

Where Sector Businesses are Clustered

Regional Competitive Advantage

0 1 2 3 4

GVRD Regional Average

Typical Business Size

Small Medium Large

Stage of Sector

Seed Emerging Expanding Transforming

Regional Sector Outlook

Decline Stable Growth

Agriculture

S10

Definitions

"Agriculture" includes all aspects of farming (crop production and animal production), and support activities for farming.

Sector Overview

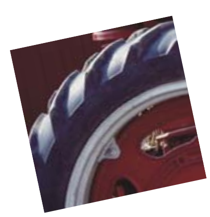
Agricultural land in BC is a scare resource. Of the land in BC, less than 3% is capable of supporting a range of agricultural uses, with just over 1% considered prime agricultural land.

Agriculture in BC generated an estimated $2.3 billion in 2003[108] and employed over 36,000 people in 2004. [109]

Burnaby

Agriculture is a small component of Burnaby's economic base, but the small land area devoted to active agriculture (over 100 ha) is surprisingly productive. This sector adds a dimension to Burnaby's diversity, character, and employment profile that is different from the urban nature of most jobs. As well, the presence of farming provides residents with opportunities to buy fresh produce and offers a kind of open space and visual appeal that is an interesting contrast with the rest of the City.

In addition to the active farms, there are also a number of agriculture related businesses including the United Flower Growers Cooperative, ProOrganics (food distributors).



S10 Burnaby (continued)

Agriculture has been recognized by the City as both a desirable and permanent land use in the community. Burnaby has about 240 ha in the Agricultural Land Reserve. Through the years, the City has implemented many measures to protect and improve its agricultural lands.

Burnaby has the third highest number of field farms, and the 5th largest area of field vegetable production in the GVRD. With over 100 ha of land in active production, cranberries and vegetables dominate the field crops with 67% and 32% respectively.

Burnaby has the highest average gross farm receipts in BC at $293,000 per farm, over 250% more than the BC average of $113,700 per farm.

Trends

Agricultural land use is under pressure from rising land values, demands for more intensive (urban) use of the land, and conflicts with adjacent land uses. The greatest pressures on BC's limited food lands are urbanization and development. In 1972, an estimated 6,000 ha (14,825 acres) of farmland were being lost every year to other uses.[110]

The Agricultural Land Reserve (ALR) was established between 1974 and 1976 in an effort to preserve and protect BC's remaining farmland.[111]

Agriculture

Trends (continued)

Since the establishment of the ALR, the average annual loss of agricultural land has been reduced by about 50%, from a yearly average of about 6,000 ha per year prior to 1974, to about 2,758 ha per year since 1974.[112]

Since designation in 1974, there has been a net loss of ALR area for the Greater Vancouver Regional District (GVRD) of 5,146.2 ha (or a reduction in size of almost 9%) to 2003.[113]

The average annual loss of ALR area in the GVRD was 177.5 ha (or 0.3%) per year between 1974 and 2003. Based on the available provisional data in recent years, between 2002 and 2005, the average loss for the GVRD has been reduced to about one-fifth of the historical average loss to 32 ha (0.05%) per year.[114]

Opportunities

The GVRD recently adopted an *"Economic Strategy for Agriculture in the Lower Mainland"* (ESALM). The ESALM is a strategic action plan with a number of immediate and second priorities aimed at the goals of:

- protecting the agricultural base,
- streamlining the regulatory process,
- ensuring availability of labour,
- developing supportive policies/plans,
- expanding the industry's image, and
- becoming market oriented.

S10
Agriculture

Sector Action Plan

The City will undertake the following actions:

Short Term

ALR Protection

Explore ways to actively protect farmland from unauthorized filling and development activity.

Farmer's Market

Consider approaching the local growers to see if there is a desire to participate in a farmer's market. If so, evaluate alternative locations to help increase access to locally grown produce and consider regulatory change, if required.

Medium Term

GVRD's *"Economic Strategy for Agriculture in the Lower Mainland"*

Examine supporting the GVRD in their implementation of the recently adopted *"Economic Strategy for Agriculture in the Lower Mainland"*.

Organic Farming

Explore working with the GVRD to encourage local farmers to consider adopting organic farming practices whenever possible and report back on the success stories (note this action is also listed in General Strategy G4 – Striving for a Greener Community).

Ongoing

Retention

Continue to maintain a clear and firm commitment to retain agricultural land in Burnaby and continue to consult with growers to ensure the continued viability of agricultural operations in Burnaby.

Gate Sales

Continue to permit the sale of locally grown produce directly from local farms.

Adjacent Uses

Continue to assist local growers in maintaining their right-to-farm by identifying ways to minimize or avoid conflicts between farming and adjacent uses, as they arise.

S11: Social Integration, Not-for-profit

Burnaby Sector Fact Sheet S11

Social Integration, Not-for-profit

Example Agencies In Burnaby

Not-for-Profit
Burnaby Association for Community Inclusion
Burnaby Family Life Institute
Burnaby School District #41
Edmonds Town Centre Business & Community Association
Progressive Housing Society
St. Leonard's Youth and Family Service Society
South Burnaby Neighbourhood House
United Way of Lower Mainland

Where Sector Agencies are Clustered

Regional Competitive Advantage

0 1 2 3 4

GVRD Regional Average

Typical Agency Size

Small Medium Large

Stage of Sector

Seed ○ Emerging ○ Expanding ○ Transforming ●

Regional Sector Outlook

Decline Stable Growth

S11

Definitions

"Not-for-profits" are societies and agencies that are active in the social services field.

Sector Overview

Not-for-profit agencies contribute to social integration, which in turn has a significant impact on determining quality of life for individuals, families, and the community at large. From an economic development perspective, this sector can help address issues associated with:

- Immigration;
- Off-shore professional credentials;
- Cultural diversity;
- English as a second language (ESL);
- Employment and training;
- Affordable housing;
- Homelessness;
- Crime;
- Inequity;
- Childcare;
- Seniors;
- Healthcare; and
- Mental health.

S11 Burnaby

Courtesy of Larry Wright/BurnabyNOW

The Existing Situation

Burnaby has a number of strengths, including:

- A large pool of potential volunteers which can be tapped to assist with community-based social initiatives.
- A caring community.
- Partnership with the Burnaby School District in supporting community schools in Burnaby.
- Bonus density program which has resulted in social amenities such as child care facilities, community police offices, and program/office space for not-for-profit agencies within recent mixed use and commercial developments.
- Social Planning staff within the Planning Department, who work with Burnaby Interagency Council, its networks, and key community based committees.

A Future Vision

Participants at the social integration/not-for-profit workshop articulated a social vision for Burnaby in which sustainable economic development will ensure a healthy and livable community with:

- a high quality of life and wellness,
- connections in the community, and
- opportunities for the participation of all residents.

Courtesy of Burnaby-New Westminster NewsLeader

Trends

The following trends were identified as concerns. Burnaby has:

- the second highest *rate of poverty* in BC – 23% of families live below the poverty line;
- nearly half of its population speaks *English as a second language* (ESL);
- one of the most *ethnically diverse* communities in BC (which can lead to isolated segments of the population, unemployment and under-employment);
- a significant number of people who were *formerly institutionalized* (e.g., for mental illness, physical disabilities), and who have not been socially and economically integrated into the community; and
- a significant number of *"astronaut" families* - families in which youth live and go to school in Burnaby, while parents live and work in another country.

Trends of concern to *not-for-profits* include:

- Number of clients and the complexity of their needs are increasing - overall demand is increasing, an increasing poverty rate, and a high percentage of ESL residents.
- The long-term sustainability of not-for-profit groups is questionable as agencies currently must compete with each other for limited funds. This undermines the ability of community groups to work together as effectively as possible.

S11 **Opportunities**

The following opportunities have potential to promote *social integration* and sustainability for *not-for-profit* agencies:

Social Integration

- *Community schools* have the ability to create projects and develop initiatives targeted at specific community issues and at enhancing the ability of individuals and the community to respond to issues. Community schools also serve as places where parents and young people interface with the broader community and with other families.
- A wide range of *housing options* strengthens a community and broadens its diversity. The required range includes housing affordable to and suitable for low-income households, persons with disabilities, persons requiring support services to remain in the community, and persons who have been living on the street. Relevant options discussed were co-operative and non-profit housing, secondary suites, supported living units, and shelters.
- Locally-based and affordable supports and services such as English language classes, childcare, and transportation help to build *social capital*.

Not-for-Profit

- Not-for-profit organizations in Burnaby have a history of *working together collaboratively,* and with increased support from the City, cooperation and coordination of services could be increased/enhanced significantly.
- Many Burnaby non-profit agencies that are accredited, could *share their expertise* with those agencies that are not accredited (which could increase organizational standards and the overall quality of services).
- Organizations are becoming creative in order to *reduce costs* and continue to deliver services (e.g., sharing of administrative services, co-operative bulk purchasing, mergers).
- The City of Burnaby should continue to provide and consider expanding the provision of *affordable office/ programming space* and *community grants* for some non-profit organizations.

S11
Social Integration, Not-for-profit

Sector Action Plan

This action plan is divided into components for social integration, and not-for-profit.

SOCIAL INTEGRATION
Work with Others

Short Term

Social Responsibility Award
Consider encouraging the Burnaby Board of Trade to introduce a business award for social responsibility (note: this action is also listed in General Strategy G9 – Working With the Burnaby Board of Trade, Tourism Burnaby).

At-promise Burnaby BOT Memberships
Look for opportunities to waive Burnaby Board of Trade (BBOT) membership fees for a fixed number of companies/organizations which employ workers "at-promise".[115]

Group Purchasing Program
Consider working with other organizations, such as the United Services Co-op to develop a group purchasing program to reduce the cost of supplies including paper, food, and computers through bulk purchasing.

Social Purchasing[116] Portal
Consider working with other organizations to develop a social purchasing portal through which services or items created or provided by clients of local service agencies such as BACI, BFLI, etc. could be promoted; use City of Vancouver Social Purchasing Portal as a model.

SOCIAL INTEGRATION
Work with Others (continued)

Short Term (continued)

<u>Social Responsibility</u>
Look for opportunities to encourage the business community to embrace social responsibility through awareness campaigns about social issues related to:

- hiring practices,
- wages paid,
- purchasing policies, and
- the provision of free or low-cost technology assistance to non-profits.

Medium Term

<u>Multi-service Hub Facility</u>
Pursue a City-Federal partnership to establish a multi-service hub facility in the Edmonds area focusing primarily on immigrant and multicultural services for newcomers to Canada.

<u>Off-shore Credentials</u>
Look for opportunities to lobby other levels of government and professional associations to streamline retraining and skills upgrading opportunities and accreditation processes so that immigrants with offshore credentials can contribute to the local economy and community (i.e., "Hidden Treasures").

<u>Provincial Funding</u>
Look for opportunities to lobby the Province for more funding for social programs, and offer to co-fund on an issue by issue basis.

SOCIAL INTEGRATION
City of Burnaby

Short Term

<u>Social Profile</u>

Consider developing a social profile of Burnaby, so that information on Burnaby's population is readily available to help identify the relative strengths and diversity of the City.

<u>Social Vision</u>

Consider facilitating the development of a social vision, which incorporates the community of Burnaby's goals regarding poverty reduction, multiculturalism, the role of persons with disabilities, etc. to help efforts toward being a more inclusive society.

<u>Social Integration</u>

Look for opportunities to support and facilitate community initiatives which enhance social integration.

Consider social integration in possible aspects of City work by:

- Serving as a model for hiring people who are "at promise". [117]
- Serving as a model for providing livable wages and for hiring locally.

<u>Land Use</u>

Look for opportunities to recognize the impact that land use decisions have on the social fabric of the community and ensure that such decisions maintain or enhance social integration.

SOCIAL INTEGRATION
City of Burnaby (continued)

Short Term (continued)

Success Stories
Consider providing leadership in raising awareness of local success stories regarding social integration (e.g., articles in local newspapers and *InfoBurnaby;* use *InfoBurnaby* to highlight how the City supports/delivers community services which promote social integration).

Training
Consider providing Burnaby firefighters and Burnaby RCMP officers with training/information on community-based social service resources, as police officers and firefighters are often front-line responders to social crises.

Medium Term

Rezoning Bonuses
Consider providing opportunities for local service providers to offer input into community benefits, derived through the zoning process, in order to maximize use, respond to priority issues, and ensure a social mix.

Not-for-profit
Consider providing more support for local not-for-profit service agencies (see next section of the action plan).

Neighbourhood Houses
Consider supporting/facilitating the development of neighbourhood houses in north and east Burnaby.

Community Schools
Consider increasing funding and expanding the community schools program.

SOCIAL INTEGRATION
City of Burnaby (continued)

Ongoing

Affordable Housing

Continue to use the City's authority to assist in increasing the range and quantity of affordable housing and suitability for all (including "at promise" groups):

- consider facilitating secondary suites;
- consider providing City land at below market rates for non-market housing and other innovative affordable housing forms; and
- consider supporting the development of a barrier-free shelter for homeless people.

Childcare

Continue to support childcare as an essential community service.

Consider pairing childcare with research and/or advanced childcare.

NOT-FOR-PROFIT

Short Term

Eligibility Criteria

Consider revising eligibility criteria for the City's community grants program to include operating costs and/or core funding for non-profit organizations, especially for those organizations which cannot access affordable City-owned office space; this could entail including a social services line in the City budget.

Success Stories

Help publicize the link between social integration success stories and the work of local not-for-profit groups (e.g., use InfoBurnaby or encourage local newspapers to include a not-for-profit community service section; BCIT students could help package stories).

United Way's *"Enterprising Non-Profits Program"*

Consider promoting and becoming a funding partner in the United Way's *"Enterprising Non-Profits Program".*

Social Purchasing

Consider purchasing City "memento" items such as coffee cups, key chains, pens, etc. from local not-for-profit entrepreneurs (e.g., BACI).

Medium Term

Contributions in Kind

Consider deploying existing City resources to support and assist not-for-profit organizations. Possible initiatives could include:

- looking for opportunities to have the Information Services Department host technology training sessions and assist non-profits with computer use;
- looking for opportunities to make surplus computer hardware equipment available to local not-for-profit agencies;

- looking for opportunities to review maintenance requirements for City-owned office space, with a view to removing burden from non-profits (e.g., window cleaning, painting, minor renovations, and improved electrical capacity);
- looking for opportunities to provide administrative support for agencies through printing, faxing and other means of distributing information (e.g., include a community services page/column in *InfoBurnaby)*;
- looking for opportunities to have the Legal Department provide legal advice/assistance to non-profit groups; and
- looking for opportunities to expand Citizens Support Services to assist not-for-profits with volunteer development, recruitment, and ongoing support.

Gaming Funds

Consider revising the City's criteria for use of gaming funds. Possible initiatives could include:

- considering capital projects of benefit to non-profit organizations; and
- considering operating and core funding for social programs delivered by non-profit agencies.

Administrative Requirements

Consider helping to reduce the administrative burden on not-for-profit agencies. Possible initiatives could include:

- looking for opportunities to streamline of the process for awarding community grants to provide funding for three years rather than one;
- looking for opportunities to harmonize the community grant process with requirements of other funding sources such as the United Way; and
- looking for opportunities to reduce the amount of administration and paperwork required to apply for and receive City grants.

NOT-FOR-PROFIT *(continued)*

Ongoing (continued)

City Owned Space

Consider increasing the inventory of affordable City-owned office space and program space offered to non-profit organizations on a rent-free or low-rent basis. This could be done by:

- considering the development of a long-range plan for providing office and programming space for non-profit organizations. One key element of the plan should be replacement of office and programming space at Burnaby Heights Community Resource Centre;
- considering more frequent selection of non-profit office space as the community benefit to be achieved through the Density Bonus Program; and
- considering application for Federal funding for City infrastructure.

Monitoring Progress and Updating the EDS 2020

Monitoring Progress and Updating the Economic Development Strategy

The City will undertake the following actions:

1. Consider monitoring trends in the number and mix of firms and employees in Burnaby, to see if growth is occurring in the desired sectors.
2. Consider convening a conference or workshop annually to report on economic development activities, share the results of ongoing monitoring, and discuss refinements to the Economic Development Strategy. The City will collaborate with the Burnaby Board of Trade and Tourism Burnaby.
3. Explore the feasibility of developing a comprehensive monitor of overall community and economic well-being, with the aim of showing trends in social, environmental, and economic conditions.
4. Consider updating this Strategy no later than 2020.

End Notes

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[1] Munroe, John M., *"Burnaby's Economy in 2013: An Analysis of Trends",* 2004, p. 13

[2] http://www.bcstats.gov.bc.ca/data/pop/pop/estspop.asp

[3] Munroe, John M., *"Burnaby's Economy in 2013: An Analysis of Trends",* 2004, p. 14

[4] Statistics Canada, employment and labour force data - 1991, 1996, 2001

[5] Munroe, John M., *"Burnaby's Economy in 2013: An Analysis of Trends",* 2004, p. 14

[6] Munroe, John M., *"Burnaby's Economy in 2013: An Analysis of Trends",* 2004, p. 14

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[8] Munroe, John M., *"Burnaby's Economy in 2013: An Analysis of Trends",* 2004, p. 14

[9] http://www.bankofcanada.ca/en/rates/exchange.html

[10] Munroe, John M., *"Burnaby's Economy in 2013: An Analysis of Trends",* 2004, p. 14

[11] http://www.bankofcanada.ca/en/monetary/target.html

[12] The two exceptions are transportation/warehousing with 880 jobs (or 0.8%) and real estate/rental/leasing with 385 jobs (or 0.4%).

[13] Burnaby has no direct means to influence the value of the Canadian dollar, interest rates, international trade, or global events, yet all of these have huge impact on changes in Greater Vancouver's economy. Setting a numerical target for job growth, therefore, could be considered a pointless exercise for a municipality. If global economic winds are favourable, Burnaby could meet or exceed the target even if the City is essentially obstructionist. If the global wind is contrary, Burnaby could fail to meet its target even while implementing the most enlightened municipal economic strategy.

[14] Willingdon between Sanderson Way and Canada Way is served by a bus every 3.5 minutes in the peaks and Canada Way (east of Willingdon) has a bus every 15 minutes in the peaks.

[15] Eco-sculptures are located at both Burnaby Village Museum and Playground of the Gods at Burnaby Mountain Park.

[16] Floral display gardens are located at City Hall, Centennial Garden at Burnaby Mountain Park, and Century Garden at Deer Lake Park.

[17] WEDC, MCSE & BC Stats, *"Small Business Profile 2002",* http://www.cfib.ca/research/reports/pdf/sme 2002 e.pdf

[18] http://www.gvrd.bc.ca/sustainability/economic.htm

[19] http://www.gvrd.bc.ca/sustainability/economic.htm

[20] http://www.gvrd.bc.ca/sustainability/economic.htm

[21] TransLink, *"Making Buses a Priority – 2005 Status Report on Bus Priority Measures in Greater Vancouver"*, November 2005

[22] Burnaby New Westminster Newsleader, May 25, 2006

[23] An analysis of Statistic Canada industrial codes was undertaken comparing ratios of employment concentrations within the GVRD versus Burnaby. In areas where the ratio within Burnaby was higher than the ratio within the GVRD, it was determined that Burnaby had demonstrated a regional competitive advantage. See ***Appendix "C"*** for more detail.

[24] The stage of each sector within the GVRD was generalized into four categories for the purpose of the analysis of industrial clusters in Burnaby: *seed* - there are only a few firms, each with specialized competencies, and a potential for growth; *emerging* - there is a pattern of growth from few to many firms, there is fast growth, but few links among the firms; *expanding* - new firms form in the cluster and attract other firms to the cluster, there are many linkages among the firms, specialized suppliers providing inputs and services to these firms appear to be growing in size and number; and *transforming* - these clusters are in the process of transforming themselves into something different (not necessarily disappearing) with most of their growth occurring outside the region and there may be spin-offs within the region which start next-generation clusters (this is the real test of the continuity of a cluster). See ***Appendix "C"*** for more detail.

[25] http://www.competitivealternatives.com/highlights/default.asp

[26] KPMG, *"Business Study 2004"*

[27] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 25

[28] http://www.winbc.org/wireless-industry-bc.html

[29] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 27

[30] http://www.winbc.org/wireless-industry-bc.html

[31] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 27

[32] Association of University Technology Managers (AUTM), *"AUTM Licensing Survey: FY 2002"*

[33] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 25

[34] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 25

[35] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper – Media Backgrounder"* October 9, 2003

[36] http://www.winbc.org/pdfs/WINBC_2005BCWirelessSurvey.pdf

[37] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 27

[38] http://www.winbc.org/wireless-industry-bc.html

[39] http://www.bcbiotech.ca/Industry/Critical_Mass/default.asp

[40] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 35

[41] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper – Media Backgrounder"* October 9, 2003

[42] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 36

[43] http://competivealternatives.com

[44] http://www.bcbiotech.ca/Industry/Critical_Mass/default.asp

[45] Association of University Technology Managers (AUTM), *"AUTM Licensing Survey: FY 2002"*

[46] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 36

[47] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 36

[48] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 36

[49] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 37

[50] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 37

[51] http://bcbiotech.ca/Industry/Commercial_Success/default.asp

[52] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper – Media Backgrounder"* October 9, 2003

[53] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 37

[54]Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 37

[55] http://www.bcfilmcommission.com/industry_profile/

[56] http://strategis.ic.gc.ca/epic/internet/inict_c-g_tic.nsf/en/h_tk00069e.html

[57] http://www.bcfilmcommission.com/industry_profile/

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[62] http://www.bcfilmcommission.com/industry_contacts/studios.php

[63] Pricewaterhouse Coopers, *"An Integrated Strategy for BC's Technology Clusters: A White Paper"* 2003, p. 30

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[78] http://strategis.ic.gc.ca/epic/internet/inptg-sc.nsf/en/pg00018e.html

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[115] A positive language alternative term for "marginalized" people or "disabled" people.

[116] Social purchasing occurs when a product is purchased which has a value added benefit to it (e.g., the company who produces the product employs people who are recent graduates of training programs or people who were previously at risk).

[117] A positive language alternative term for "marginalized" people or "disabled" people.