ICT Clusters: Response

Policy Implications of ONRIS Research

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ICT Clusters: Response

- Learning Opportunity for MEDT

- Issues

- Links to ICT Branch efforts

Learning Opportunity

- Depth of information based on literature review and interviews
  - Cluster theory, regional innovation systems theory
  - Learn and confirm re: clusters we work with
    - In K-W, lack of emphasis on key cluster characteristics, such as low level of inter-firm linkages at local level
  - Opportunity to learn about ICT clusters in the rest of Canada
    - E.g.: Calgary, Quebec, New Brunswick, Cape Breton

Issues

- What does ONRIS tell us about the role of government in cluster development?

- What can be done to integrate ICT cluster networks across the province?

- Should government policy address non-traditional issues?

  - E.g.: Should government address issues related to 'culture' in places like K-W?

- Where does Toronto stand?

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Links to ICT Branch Efforts

- ICT Cluster Identification

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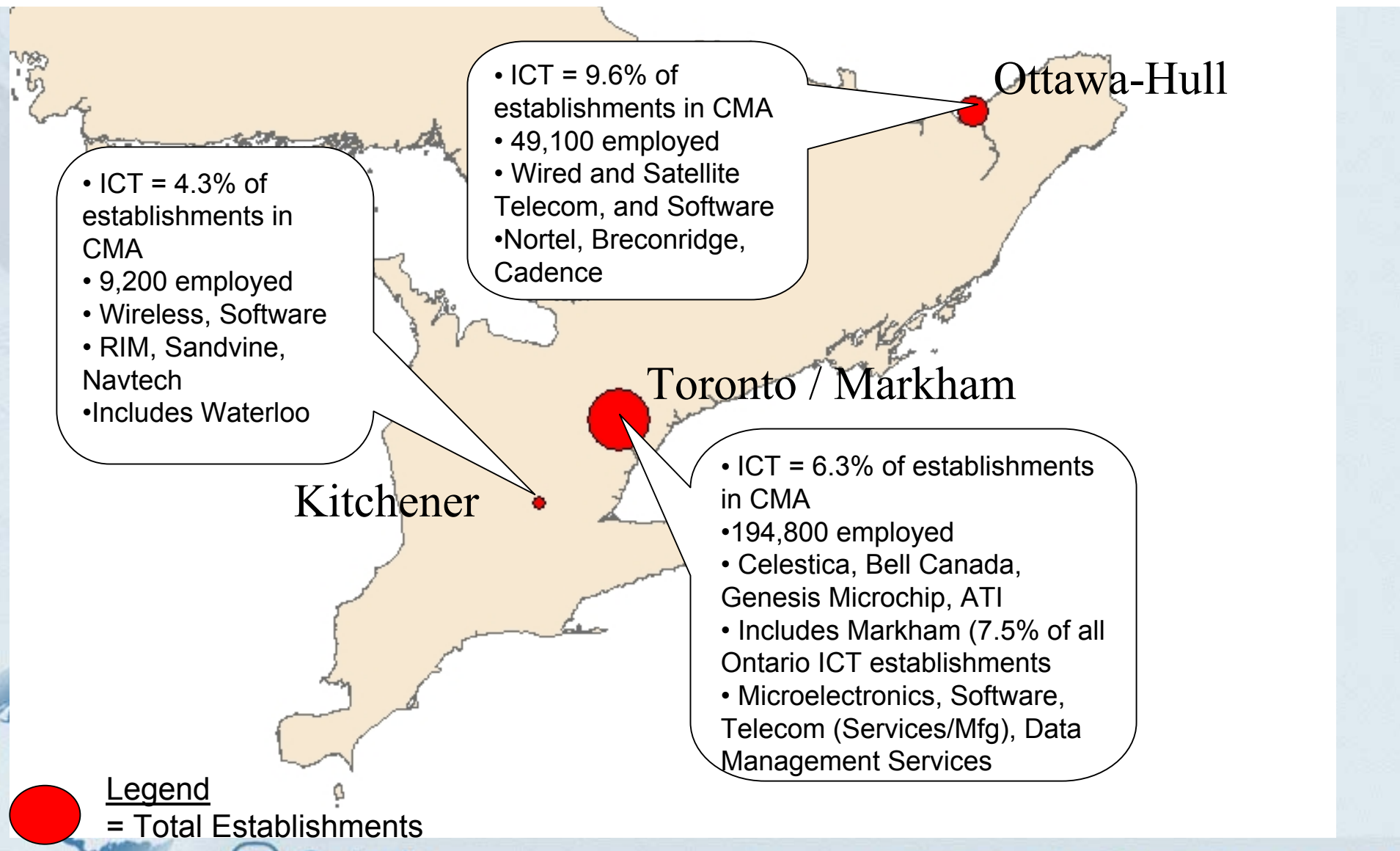# ICT is Critical to Ontario's Economy

~ **300,000** employed (2003)

$26.6B in output (2002)

$10.6B in ICT manufactured goods exported (2003)

$5.2B invested in private sector R&D (2003)

84% of Ontario's ICT Companies are Clustered in Four Leading Regions

Ottawa-Hull
- ICT = 9.6% of establishments in CMA
- 49,100 employed
- Wired and Satellite Telecom, and Software
- Nortel, Breconridge, Cadence

- ICT = 4.3% of establishments in CMA
- 9,200 employed
- Wireless, Software
- RIM, Sandvine, Navtech
- Includes Waterloo

Kitchener

Toronto / Markham
- ICT = 6.3% of establishments in CMA
- 194,800 employed
- Celestica, Bell Canada, Genesis Microchip, ATI
- Includes Markham (7.5% of all Ontario ICT establishments
- Microelectronics, Software, Telecom (Services/Mfg), Data Management Services

<u>Legend</u>
= Total Establishments

pment and Trade

Links to ICT Branch Efforts

- ICT Cluster Identification

- Stakeholders and Other Government

- Project Support

  – Financial support for City of Toronto ICT Profile, OCRI / K-W Commercialization study

- Policy Support

  – Contribution to development of recently announced $27M commercialization fund

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