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TECHNATION[CA]

Annual Review
2022-2023

BOLD AND
UNIFIED

CHARTING THE
FUTURE OF
CANADA'S TECH
INDUSTRY

**BOLD AND UNIFIED**

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# CANADA'S ICT SECTOR

Canada's tech sector posted strong growth in 2021 and outperformed the overall Canadian economy in terms of output, employment, and innovation growth.

## 45,000+ COMPANIES
**2.2%** increase over 2020

## 717,597 W0RKERS
**5.7%** increase over 2020

## $104.5 billion GDP
**5.3% of Canada's GDP**
**4.7%** increase over 2020

## 52.5% HIGHER THAN ECONOMY-WIDE AVERAGE SALARIES
**6.3%** increase over 2020

## 59% OF WORKERS HAVE UNIVERSITY DEGREES
**25% higher than all Canadian industries**

## $242 billion IN REVENUES
**4.7%** increase over 2020

## 44.1% OF ALL PRIVATE SECTOR INVESTMENTS IN R&D
**$10.3 billion**
**9.1%** increase from 2020

International Data Corporation (IDC) Canada expects the Canadian information and communication technology (ICT) market will expand to $142.6 billion by 2026.

Source: idc.com/getdoc.jsp?containerId=CA48464022

# MESSAGE FROM **National Board of Directors Chair**

2022 was another fascinating and ever-changing year for Canada's technology sector. As Chair of TECHNATION's National Board of Directors, it has been my pleasure to help lead the vital work this national association does every day to showcase our members and foster a competitive and secure nation.

The world is undeniably in a period of profound uncertainty. Daily, we hear and see geo-political, economic and climate change concerns, yet I am hopeful. I am hopeful because we know that technology can help provide solutions for these modern challenges.

As we have seen in the past, technology has proven to be one of the most important segments to our economy. It touches almost every aspect of our lives and multiple generations are now using technology in surprising and new ways.

But as the world, and Canada, grows increasingly reliant on technology, we must remain even more vigilant. TECHNATION has been working diligently over the past year with the Federal Government to strengthen Canada's cybersecurity resiliency and reinforce the message that innovation and greater governance of technology risk is needed to help our country protect itself against cyber threats.

The world of work is also undergoing rapid transformation, with traditional industries seeing a major shift in the way they do business. Part of this workforce disruption included substantial layoffs in our sector this past year. Yet many technology companies continue to experience a gap in finding qualified talent. TECHNATION continues to drive productivity and competitiveness through Future Workforce Development initiatives, creating career pathways into tech through career fairs and student challenges and championing a diverse and inclusive workforce in our industry.

Supply chain disruption continues to be an ongoing concern causing significant economic impact to both businesses and consumers across the globe. The effects of global supply chain disruptions can be seen everywhere. All of this adds a financial burden to businesses, as well as higher prices for the end consumer.

Technology can play a part in providing better predictive tools that can help. The continuous growth of digital transformation is revolutionizing the way businesses and industries operate. Predictive tools are an important component in this process, helping businesses stay ahead of disruptions such as sudden material shortages or delays in production or delivery.

In less than one short year, artificial intelligence has become a household word as chatbots captured global attention. Successful businesses know that leveraging technology-enabled digitalization can improve customer experiences and streamline internal processes and operations. By combining advanced analytics with other technologies such as artificial intelligence and machine learning, businesses can utilize deeper data intelligence. This combination allows companies to gain predictive insights which can lead to improved efficiency, better customer service and more personalized offerings. What was once the domain of fantasy is fast becoming the new normal.

The pandemic will ultimately be considered one of the most significant historical events of this century. As such, the work TECHNATION is doing has never been more important. By adopting innovative tech solutions, current volatility can be leveraged into opportunities to build a more resilient and competitive national economy, and ensure that Canada's IT sector grows and re-emerges as a global leader, creating the jobs and opportunities of tomorrow.

**ANGELA BROWN**
TECHNATION National Board Chair
President & CEO, Moneris

# MESSAGE FROM **TECHNATION President & CEO**

2022-2023 was a significant and challenging year, with widespread uncertainty which will continue as we move into 2023-2024.

I believe our success this year has been based on the foundation of our core advocacy efforts in working collaboratively with government to co-design federal and regional programs. We have continued to scale the Canada's Digital Marketplace platform in partnership with Shared Services Canada (SSC), resulting in increased B2B and B2G procurement opportunities for our members.

We heard our members' concerns, specifically with respect to cybersecurity and difficulties accessing a skilled workforce. In response, in the past year we delivered a steady focus on cybersecurity, agile procurement, data interoperability, relevant talent development, and digital transformation of government at all levels.

Public-private sector collaboration also became a core mandate with respect to cybersecurity and the growing national and global threat. Our Cybersecurity Taskforce has come together to identify realistic cyber imperatives and develop strategies to rapidly increase the supply of qualified cybersecurity workers. Our multidisciplinary Taskforce delivered a Cyber Situation Report to federal government leaders, with the top recommendation being the need to establish a national public-private sector coalition. As a result, the Taskforce led a successful public-private sector Strategic Knowledge Exchange (SKE) roundtable to establish a roadmap for future themes and creating strategic priorities with key federal government ministries.

Looking back on 2022-2023, we are proud of the value and impact our programs have delivered. Our Government Relations & Policy (GR&P) and Industry programs provided expanded engagement for our members across all levels of government. Our GR&P team hosted several successful Enabling Digital Government for Everyone (EDGE) webinars featuring industry and government expert panels discussing how to successfully adopt and deploy enabling and cutting-edge technologies.

Our Industry business unit increased government access and collaboration across Canada leading a very successful pan-Canadian National CIO series highlighting leadership diversity as well as an ongoing focus on the 'Future of Work' theme which was featured in a dedicated series for leaders within and beyond the Tech sector.

Digital trade has been the fastest-growing area of global trade over the past decade, growing by 5.4% each year on average and contributing more to global growth than the trade in goods.[1]

One study shows that by 2023 cross-border B2B commerce is expected to account for two-thirds of digital trade ($1.78 trillion).[2]

[1,2] www3.weforum.org/docs/WEF_Data_Free_Flow_with_Trust_2022.pdf

Our Health division hosted public-private sector forums to drive a much-needed national data interoperability action plan.

Our Future Workforce Development (FWD) business unit has been driving our most diverse programming, including delivering unique student challenges around the Future of Work and Accessibility and expanding our AI-based CareerFinder and Employer Partner LaunchPad platform offerings.

We also re-imagined our Ingenious Awards, introducing two new awards – Public Sector Disruptor of the Year and the Canadian Tech Hall of Fame – to acknowledge efforts of significant disruptors in Canada's technological innovation and drivers of prosperity.



Angela Mondou, Chris Barry (President of Microsoft Canada) and Denise Shortt at FutureWave 2023 in Vancouver
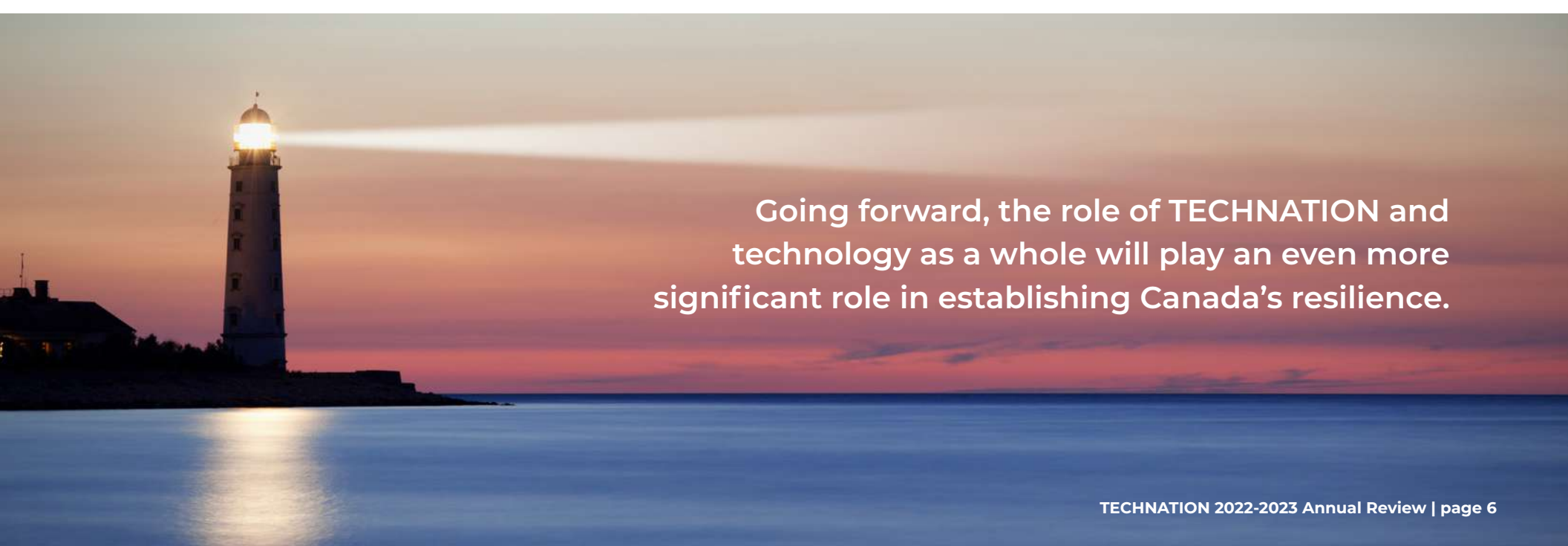
Finally, as an expansion of our CEO Get Canada #BackonTrack Podcasts, we held several CEO SKE roundtable sessions. We heard unique insights from multi-sector executives around the role of digitalization and tech adoption as a critical resilience management strategy considering the current economic and social instability.

Moving ahead into this year, the one thing I can say for certain is that we, as a nation and global society, are facing more volatility than ever. Building upon TECHNATION's action-oriented 2022-2023, we look forward to continuing to engage and support our members as we all weather the storm of uncertainty together. Going forward, the role of TECHNATION and technology as a whole will play an even more significant role in establishing Canada's resilience.

**ANGELA MONDOU**
TECHNATION President & CEO



Going forward, the role of TECHNATION and technology as a whole will play an even more significant role in establishing Canada's resilience.

# ABOUT TECHNATION

## Unifying Technology, Government and Community for Canada's Future

TECHNATION proudly represents technology companies nation-wide, who are changing the world! Our members represent world-class innovators, disruptors and creative-thinkers in Canada's tech industry.

**VISION**

A Canada that has achieved a true world-class, leading digital society that continues to deliver prosperity and competitiveness for the country.

**MISSION**

To enhance the significant contribution that technology can make to Canada's economic prosperity and global competitiveness. This will be achieved through the:

- Robust adoption of tech across all sectors
- Increasing tech talent, skills and diversity in all sectors
- Acceleration of government modernization

## Strategic Priorities
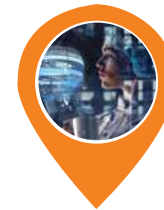
**LEAD THE INDUSTRY-GOVERNMENT NEXUS FOR CANADA'S FUTURE**

**INDUSTRY, PROSPERITY & GROWTH**

**FUTURE WORKFORCE DEVELOPMENT**

**HEALTH**

**TECH4CANADA**

**To learn more**, please visit technationcanada.ca/en/our-vision-and-mission/

# GOVERNMENT RELATIONS & POLICY

Throughout the year we continued to work with the Federal and Ontario governments to develop focused approaches for industry-government collaboration and tech policy co-creation. Our 2023 budget submissions urged our governments to invest in procurement modernization to support transformation efforts, cybersecurity to safeguard our citizens and businesses, and to focus on the technology sector as a key driver of our economic future.

TECHNATION's Government Relations & Policy (GR&P) team maintained its focus on re-imagining how government buys – driving procurement reform and supplier diversity in the public sector. We established Federal and Ontario procurement working groups with member co-chairs, to update, consult with and advise the GR&P team on needed policy changes, equitable opportunity for all companies, and value for citizens.

We also continued our collaboration with Shared Services Canada (SSC), leveraging Canada's Digital Marketplace, in its social procurement initiative ScaleUp. The pilot uses set asides to target contracts up to $238K for micro and small under-represented and Indigenous businesses across Canada.

On the policy front, TECHNATION cautioned the Government of Canada on enacting legislation that is not in sync with international best practices, which hampers interoperability and makes Canada an unappealing place to do business in, especially for our Big Tech members.

On the matter of **broadband**, we advocated for the Federal Government to rethink its framework for spectrum licensing, to increase rural connectivity and benefit MSMEs

(Micro, Small, and Medium Enterprises) who desperately need high-speed internet connectivity to remain competitive.

We supported and encouraged the federal government to **enact strong competition laws and policies** to align Canada with our international counterparts and ensure that businesses and consumers benefit from a competitive marketplace, but without unfairly targeting Big Tech.



*Fireside chat with Catherine Luelo, CIO for Canada*

## OUR MANDATE:
### Influence government to affect change

- **Reduce friction between government and industry.**

- **Drive change in key government areas (e.g., procurement process improvements, policy).**

- **Government and industry co-creation (e.g. digital roadmaps; agile procurement).**

We hosted dialogues with Government officials including an intimate fireside chat with Catherine Luelo, Chief Information Officer for Canada on [Canada's Digital Ambition](#) where she asked our industry members to be 'brutally honest' with regards to the Government of Canada's enterprise-wide transformation plan.

GR&P gathered a cross-section of members from our Cloud Working Group together with representatives from SSC, Public Services and Procurement Canada (PSPC), Treasury Board Secretariat (TBS), and the Canadian Centre for Cyber Security (CCCS) for a working session to discuss the **Cloud Framework Agreement 2.0** proposed approach and next steps. We also began to explore co-creation of future methods of supply for cloud services for the Government of Canada.

**Our EDGE webinar series** continued to present practical approaches to help governments with how to successfully adopt and deploy technology. Topics included:

- **Traveller Modernization using Biometrics**, demonstrating how this enabling technology was making our border experience safer, faster, and better;

- **A More Sustainable Future: Achieving Net Zero Together** on what it will take to achieve net zero (e.g. sustainable procurement and Canada's Net Zero Challenge).

# IMPACT

- Hosted in-person **Industry Day on Cloud** with 130 attendees (members and Federal Government stakeholders) resulting in **16 Key Recommendations**

- Shared Services Canada (SSC) asked TECHNATION to **lead industry engagement** on Cloud Framework Agreement 2.0 and **co-develop a future method of supply for optimized Cloud services**.

- Led **29 Committee and Working Group meetings**, including ad hoc Legal, and new Cloud and Procurement Working Groups:

| Committee & Working Group Meetings | Participants |
|---|---|
| Public Policy & Advocacy Committee/ Legal Working Group | 160 |
| Ad hoc Legal – AIDA, CPPA, OSFI | 98 |
| Federal Public Sector Business Committee | 356 |
| Cloud Working Group | 82 |
| Federal Procurement Working Group | 9 |
| Ontario Public Sector Business Committee | 153 |

**Policy consultations / submissions** on over **15 'bills'** including:

C-27 (Privacy)

C-27 (Artificial Intelligence)

C-26 (Cyber)

Competition policy

Online Safety

OSFI Guideline B-10 (Risk Management)

C-244 (Right to Repair)

ON Bill 27 (Employment Standards Act)

Spectrum (Broadband)

ETHI Study on Facial Recognition Tech

and more…

- **Canada's Digital Marketplace** reached **765 registered (domestic) suppliers**, contributed to **8 ScaleUp pilots**, and delivered two information webinars with more than **200 participants** from across Canada.



"It (Canada's Digital Marketplace) provides a mechanism for us to reach other groups, to expand our reach and to gain access to innovative Canadian firms, and that's really important for us."

**Matt Davies**
Chief Technology Officer,
Shared Services Canada



"This is the first year that we are actually being found by government and being invited to some of these procurements. And we've won some now!"

**Sylvie Ouellette**
CEO and Co-founder, Versatil

# FORWARD LOOKING

**Government Relations & Policy will continue to deliver the value that our members expect from our advocacy and policy activities with all levels of government.**

TECHNATION's **Queen's Park Day** and **Hill Day** are valuable days of advocacy where politicians, top government officials, and the tech industry work together to enable digital service delivery for citizens. Together with our members, we look forward to building upon the recommendations within both our Federal and Ontario Budget 2023 submissions and, through a spirit of collaboration and co-creation, enabling our governments to become global leaders and more digitally advanced jurisdictions. Queen's Park Day will take place in-person on May 9, 2023, and Hill Day is being planned for October 2023, also in person.

Our next **Industry Day** will take place on September 26, 2023, with a focus on re-imagining how the Federal Government buys including **supply chain resiliency, procurement reform, much needed changes to terms and conditions**, and more. TECHNATION will bring key government leaders and the tech industry together to address obstacles and explore ways to collaborate and co-create a sustainable roadmap and way forward.

We will host our second **Cloud Framework Agreement 2.0 working session** in the Fall of 2023 with SSC, PSPC, TBS and CCCS to further the refresh and begin to co-create the future method of supply for cloud services. Federal departments will join the discussion to ensure that an enterprise approach is achieved.

Led by member co-chairs, our **Federal Procurement Working Group** will engage in roundtables with PSPC and SSC on key procurement challenges facing our membership (e.g. contract security program, limitation of liability, etc.) with the goal of collectively finding mutually beneficial solutions.

Our **Ontario Procurement Working Group** will provide feedback on long-standing problematic terms and conditions and will provide supply chain expertise to Supply Ontario as it carries out its procurement modernization.

Continuing with policy work started in 2022-23, GR&P together with our **Public Policy and Advocacy Committee and Legal Working Group** (PPAC / Legal WG) will intensify the campaign to overhaul or have

Bill C-27 Part 3 – **AiDA (Artificial Intelligence and Data Act)** substantially revised before it is further advanced through the legislative process. We will also meet with the NDP and Innovation, Science and Economic Development (ISED) to more fully articulate our concerns and offer solutions.

We will also participate in consultations on Bill C-26 (cybersecurity) to address what we consider excessively broad powers under the guise of cybersecurity beyond what is necessary to achieve the Government's sought objectives, and other concerns.

**Online Safety** (formerly Online Harms) also remains a priority, with our ad hoc working group, and our request to the Minister of Canadian Heritage to meet with members around our concerns. Other policy work will centre around OSFI Guideline B-10, Bill C-11, Bill 242 Right to Repair, and more.

Finally, we plan to welcome a **new Vice-President of Public Policy** to the team to lead our policy work, and work closely with the PPAC/Legal WG in 2023-2024.

# TECH4CANADA CYBERSECURITY

TECHNATION's Cybersecurity Taskforce mission is to bring diverse national and global industry and government influencers together through Strategic Knowledge Exchange roundtable sessions. These sessions will be issue-focused cross-sector discussions to co-create future strategic approaches to solving national challenges with respect to cybersecurity, as well as the implementation of solutions.

This past year, TECHNATION's Cybersecurity Taskforce, represented by 17 cybersecurity member organizations, continued to provide a collaborative platform and ecosystem for thought leadership in cybersecurity in order to enhance Canada's overall cybersecurity awareness, talent, and capability position.

accenture    CALIAN    CISCO

CETARK CORP    CGI    eSENTIRE
CONFIDENTIALITY · PROTECTION · SECURITY

DARKTRACE    FORTINET    FWDSEC

IBM    Infosys    ISA
                            CYBERSECURITY

KPMG    kyndryl    Microsoft

SkyHive    PLURALSIGHT
Unleashing Human Potential

**The Taskforce identified four goals and areas of focus:**

- Identify realistic cyber imperative areas for the Taskforce to tackle.

- Stimulate the development of strategies, approaches, and techniques to rapidly increase the supply of qualified cybersecurity workers.

- Educate Canadians and Canadian organizations on the vital need for cybersecurity awareness and readiness.

- Prosperity – developing a Canadian digital economy for the future.

**The Taskforce also decided to initially concentrate on two key priorities:**

1. Talent Crisis and Future Workforce; and
2. Influence and Educate Decision Makers.



In March 21, 2023, TECHNATION, along with the Communications Security Establishment (CSE), and Public Safety Canada, co-hosted a Strategic Knowledge Exchange roundtable to lay the foundation for industry and government to work together to address Canadian cybersecurity concerns and connect TECHNATION Cybersecurity Taskforce members directly with government stakeholders.

The session was attended by 11 TECHNATION industry leaders and subject matter experts and 22 senior government officials, including four Deputy Ministers. The roundtable, conducted under Chatham House rules, centered on implementation strategies for TECHNATION's proposed National Cybersecurity Taskforce recommendations to explore new ways industry and government can collaborate, address the skills and talent challenges, and discuss the requirement for standards and regulations.

# IMPACT

TECHNATION's Cybersecurity Taskforce developed a recommendation document outlining the **top three risks** identified by our Cybersecurity industry members, as well as **one capstone and four key recommendations**. It was distributed to the Federal Government in September 2022 and March 2023.

**1 ADVERSARIES' CAPABILITIES AND THE RAPIDLY CHANGING THREAT ENVIRONMENT HAVE SEVERE IMPLICATIONS DUE TO CYBER TALENT SHORTAGE**

Rate of resource turnover as well as lengthy hiring and training cycles severely impact the Canadian tech industry in its ability to keep up with the speed and agility of cyber threats.

**2 ECONOMIC IMPACT OF UNFULFILLED WORK ON INDUSTRY PRODUCTIVITY / BUSINESS / GDP**

Impact on Canada's GDP of the approximately 4,000* currently unfilled cybersecurity roles is approximately $170,000,000.

* Source: TECHNATION CareerFinder

**3 IMPACT ON CYBERSECURITY CUSTOMERS AND CANADIAN INFRASTRUCTURE AND BUSINESS**

Increase in businesses leaving for offshore support due to limited cyber talent resources nationally which will cost Canada well paid and highly skilled jobs.

**CAPSTONE RECOMMENDATION:** Launch a National Cybersecurity Taskforce to design a focused, targeted implementation plan to accelerate cybersecurity talent.

**Other Key Taskforce recommendations:**

- Cybersecurity in industry needs to be mandated as a matter of national security
- Cybersecurity, consistent with other leading-edge tech, is a highly dynamic field. Traditional workforce expectations for experience and roles do not work today.
- Recruit cyber talent from offshore: target red-tape reduction and improve movement of cyber talent. Industry needs to attract top international talent and must have quick and reliable immigration programs.
- Subsidize / fund cybersecurity organizations to train, develop and retain resources.

**TECHNATION Cybersecurity Taskforce & Government stakeholder meetings:**

- 13 TECHNATION Cybersecurity Taskforce meetings in 2022-2023

- Public Safety, Innovation, Science and Economic Development Canada (ISED), Treasury Board Secretariat, ESDC

- Canadian Center for Cyber Security (CCCS) / Communications Security Establishment (CSE)

TECHNATION contributed labour market data to the Government of Canada's second bi-annual survey on the State of Canada's Cybersecurity Industry that was released in October 2022. A session with key stakeholders was held with TECHNATION, Canadian Association of Defence and Security Industries (CADSI) and Council of Canadian Innovators (CCI) to highlight the survey findings including:

- How did Canada's cybersecurity industry fare during the onset of the COVID-19 pandemic?

- What are its specializations?

- Who does it employ?

- How much does it export and to where?
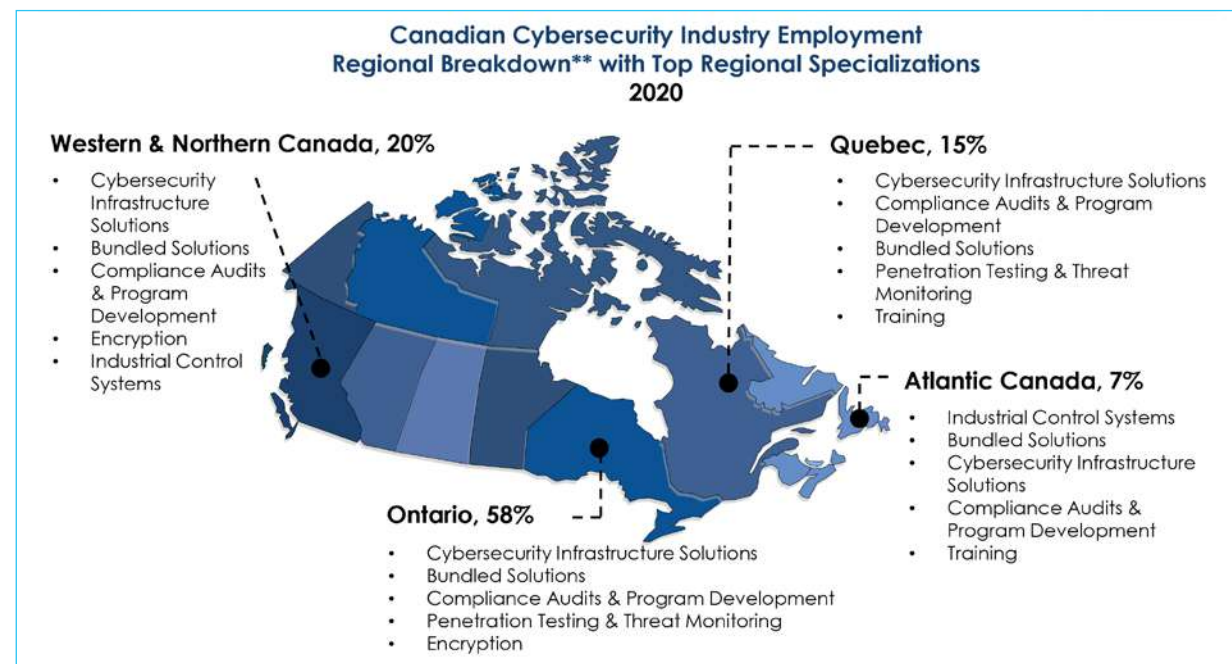
TECHNATION also conducted a public Cybersecurity awareness campaign in October 2022 to coincide with Cybersecurity Awareness Month. The campaign highlighted some concerning facts about the seriousness of cybersecurity in Canada today:

According to TECHNATION's CareerFinder there are **4,000 cyber vacancies daily** and job openings double annually so that means by 2025, there will be more than **32,000 unfilled roles** in cybersecurity in Canada if something doesn't change.

According to the Canadian Centre for Cyber Security, the average cost of a data breach is **$6.35 million per breach**.[1]

According to CSE and the Cyber Centre, **the number of cyber threat actors is rising,** they are becoming more sophisticated and state-sponsored cyber threats are increasing.[2]

It takes an average company over **280 days** to even determine that they've been hacked.

## Canadian Cybersecurity Industry Employment Regional Breakdown** with Top Regional Specializations 2020



**Western & Northern Canada, 20%**
- Cybersecurity Infrastructure Solutions
- Bundled Solutions
- Compliance Audits & Program Development
- Encryption
- Industrial Control Systems

**Quebec, 15%**
- Cybersecurity Infrastructure Solutions
- Compliance Audits & Program Development
- Bundled Solutions
- Penetration Testing & Threat Monitoring
- Training

**Atlantic Canada, 7%**
- Industrial Control Systems
- Bundled Solutions
- Cybersecurity Infrastructure Solutions
- Compliance Audits & Program Development
- Training

**Ontario, 58%**
- Cybersecurity Infrastructure Solutions
- Bundled Solutions
- Compliance Audits & Program Development
- Penetration Testing & Threat Monitoring
- Encryption

[1] https://cyber.gc.ca/en/guidance/cyber-threat-bulletin-ransomware-threat-2021
[2] Source: ncta-2020-e-web.pdf (cyber.gc.ca)

# FORWARD LOOKING

**In the coming months, our Cybersecurity Taskforce will:**

- Continue to work with government to drive towards a joint national cyber taskforce with representatives from industry, government, and academia.

- Expand efforts to engage the broader TECHNATION cybersecurity membership.

As part of the agreed upon next steps with the Government of Canada, our Cybersecurity Taskforce met in May to discuss the roundtable held in March 2023, and determine approaches, such as government-industry working groups, that can advance top priority action items coming out of the roundtable.

Through a survey of our Cybersecurity Taskforce members on 10 activities from the Roundtable output, we determined the top 3 priority actions we will bring forward to the Government of Canada as a follow-up to the Cyber SKE roundtable.

## THE TOP 3 PRIORITIES ARE:

**1.** Leverage industry expertise/input as Government refreshes the National Cyber Security Strategy and associated National Cyber Action Plan.

**2.** Explore certification/legislation on a minimum standard for cybersecurity professionals/organizations (especially where engaged in areas of national security).

**3.** Collaboration with the academia sector and learning institutions to develop cybersecurity programs that guarantee students a job post-graduation.

**TECHNATION's Cybersecurity Taskforce also ranked the remaining prior actions as follows:**

- Cross Government department investment (ISED / ESDC / Public Safety) to fund industry partnerships to accelerate cyber talent programs.

- Launch a National Cybersecurity Taskforce to design focused, targeted implementation plan to accelerate cybersecurity talent.

- Address 'barriers to collaboration' e.g., classification levels of information.

- Investigate 5 Eyes partner country approaches (i.e., Industry 100 in the UK and Joint Cyber Defense Collaborative (JCDC) in the U.S.) to define an approach for Government and Industry collaboration in Canada.

- Work with Immigration, Refugee, and Citizenship Canada (IRCC) to leverage immigration for cyber talent.

- Businesses implement annual self assessment of cyber resilience and audit those with the lowest level of cyber security.

- Identify and release cybersecurity National Occupational Classification (NOC) codes with more appropriate cybersecurity skills identified against those NOC codes and roles.

# INDUSTRY, PROSPERITY & GROWTH

TECHNATION continues to develop Business to Business (B2B) and Business to Government (B2G) opportunities for our members through our signature events and programs.

We believe that through ongoing collaboration, the public and private sectors can increase Canada's competitiveness and ensure the tech sector can thrive and grow. Our role as an industry association is to help facilitate connections that open doors for Canadian businesses, while exposing global tech leaders to new innovations and ideas. This year, TECHNATION continued to broaden our footprint by delivering several national events that provided opportunities to exchange knowledge and build meaningful relationships.

Each year, TECHNATION works with CIO leaders within the Ontario Government and across broader public sector organizations to create event opportunities for open discussion around the critical issues and challenges as they continue to build government IT services. These events offer an open and transparent exchange of ideas between industry and government leaders and help to identify opportunities for innovation, to accelerate government modernization.

## Working with the Ontario Government

TECHNATION has had a longstanding relationship with Government Information Technology Ontario (GovTechON). We work closely with the Office of the Corporate Chief Information Officer to design curated member opportunities with GovTechON.

From 24/7 cybersecurity to innovative tech, driving cloud adoption, and addressing technical debt, technology continues to play a critical role in enabling Government's transformation agenda.

These forums bring industry and government together in the shared goal to enable smarter, faster, better government services in Ontario. With rotating presentations from a variety of Ontario ministry CIOs, these events generally include more than 40 Government leaders (including Ontario Ministry CIOs) and more than 200 industry professionals. We hosted one GovTechON hybrid event in December 2022 with 233 participants including 80 government attendees.



Panel discussion at TECHNATION GovTechON event in December 2022 including John Roberts from Government of Ontario, and the following from GovTechON; Angela Copeland, Rhonda Bunn, Roman Corpuz, Manish Agarwal and Mohammad Qureshi.

*"TECHNATION plays an important role in bringing together the public and private sector entities in Canada to help us all become better. It is not about "selling"; it is about "shaping" through open dialogue. TECHNATION helps advance the entire technology industry in Canada, making us more competitive and attractive globally; it makes us all stronger."*

**ANNA LEON**, Partner, Digital Public Sector at KPMG & Chair of TECHNATION Ontario Board of Directors

## National CIO Series

TECHNATION is also proud of our National CIO event series that has expanded to include all regions of Canada and most provinces. Through these forums, members can stay abreast of what is happening across Canada. In 2022-23, TECHNATION was pleased to host well-received CIO events in the Prairies, the Atlantic Region and British Columbia.



CIO Atlantic briefing event October 2022



CIO British Columbia briefing event March 2023

## Global Tech Trade Missions

A vital connection between business and government, TECHNATION provides networking and business development opportunities that help Canadian technology companies to thrive nationally and compete globally. With CanExport's support, TECHNATION hosted an international business development program that included two global trade missions in 2022-23.



Canadian delegation at WebSummit 2022



Canadian reception at WebSummit 2022



Women in Tech reception at WebSummit 2022 in Portugal



Sylvie Ouellette of Versatil speaking at the WebSummit Women in Tech Portugal event

## RSA 2022

In June 2022, we took seven Canadian cybersecurity scale-ups companies to RSA, the largest cybersecurity conference in the world. Given TECHNATION's longstanding commitment to promoting technology innovation in Canada, RSA offered an excellent opportunity for our delegates to gain important insights and make international contacts for future collaboration with influential cybersecurity experts.

CRYPTO4A    CYDEF    FWDSEC

ISARA    IT Horizons

NationalWideTechnologies    ALATO

## WebSummit 2022

In November 2022, TECHNATION hosted our third annual trade mission to WebSummit in Lisbon, Portugal. WebSummit is the largest tech conference in Europe and boasts over 75,000 attendees. As part of the large Canadian delegation, our nine participating companies gained invaluable market intelligence; information on EU regulatory frameworks; and access to potential partners and investors.

Creative Niche    EGI    fundmore.ai

INTELLIMEDIA POWERING SUCCESS    learnlab.ai

SkyHive Unleashing Human Potential    Saltmedia

STARTUP FUEL    VERSATIL Analytics & AI-Driven Decision Making

*"My experience at WebSummit in Lisbon as a TECHNATION delegate was extraordinary. I ended up connecting with hundreds of Canadian delegates and formed many business relationships. With the B2B match program set up by CanExport, I ended up meeting with representatives from major esteemed buyers where we received interest for business development. I also secured a partnership for our company with two major buyers to provide our software for their expansion next year. I am very grateful for the TECHNATION program. It would have been unaffordable for a growing company to spend to attend. The amount of growth our business had over 5 days was more than the previous 8 months."*

**ASHLEY MARTIS
CEO and Co-Founder
StartUpFuel**

# IMPACT

**B2B and B2G Industry Events 2022-2023**

**465** INDUSTRY ATTENDEES

**176** GOVERNMENT/ BROADER PUBLIC SECTOR ATTENDEES

**EVENT SPEAKERS REGIONAL REPRESENTATION**

**TECHNATION Trade Missions 2023**

**16** COMPANIES* PARTICIPATED IN **2** CANEXPORT FUNDED TRADE MISSIONS IN 2022-23

INCLUDING **5** FEMALE-LED COMPANIES

INCLUDING **3** INDIGENOUS COMPANIES

*Participating companies were from Alberta, British Columbia, Ontario, and Quebec

# FORWARD LOOKING

Moving forward, we will continue to collaborate with Pan-Canadian CIOs and IT industry leaders in all provincial and municipal jurisdictions with a regular cadence to share government priorities and help our members more effectively do business with government at all levels by stimulating dialogue.

We will also continue to align our events with our advocacy areas of focus in order to deliver desired outcomes for both our government stakeholders and our industry members. We are dedicated to maximizing engagement with all our members regardless of their location, type and size.
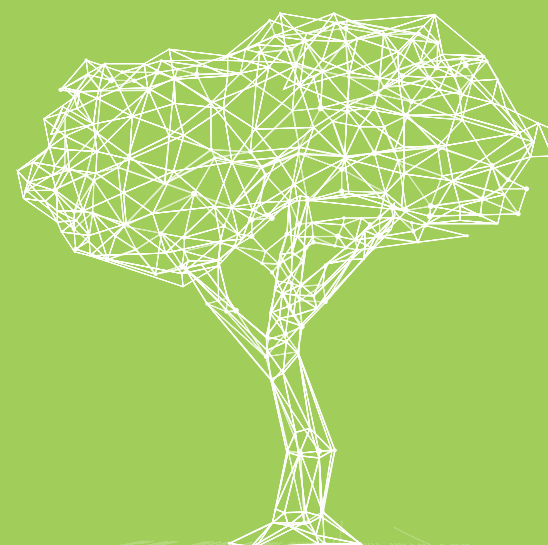
# FUTURE OF WORK

The world of work has been at the centre of seismic changes over recent years with external pressures around diversity, equity and inclusion (DEI), accessibility and the office of the future as current and prospective employees are holding companies to their commitments.

At TECHNATION, we believe diversity extends far beyond gender, race, and ethnicity. It must be inclusive of people with different perspectives, experiences, and geography. Diversity should foster inclusion and equality, encompassing acceptance and respect.

It also includes re-imagining how to harness the potential of technology to offer equitable opportunities across geography and gender inclusive of all to addressing current and projected labour shortages in Canada's tech sector.

TECHNATION is also deeply committed to inspiring the next generation of emerging tech leaders and to work with government and industry to identify alternative pathways to diverse talent.

# IMPACT

## Student Challenges

As part of TECHNATION's 'Future of Work' efforts this year, we hosted two student challenges this year that focused on specific issues facing the Canadian tech sector.

### Future of Remote Work: Cybersecurity for Canadian Businesses Student Challenge



Considerable discussion and planning is ongoing on the next steps for the future of work in the Canadian tech sector as the industry continued to navigate the pandemic beyond the third wave. One-size does not fit all and we have seen very different approaches companies continue to take on their back-to-work strategies and plans. The pandemic caused many companies to rethink their workplace spaces, culture, work incentives, hiring practices and communication and technology tools.

In this challenge, we asked teams of students to develop creative solutions to combat cyber threats in this new era of remote work. The top teams presented their ideas to a panel of judges at a live pitch event, where the winners were announced and awarded cash prizes of up to $2,000 each.

### AI for Accessibility Student Challenge

The AI for Accessibility Student Challenge asked post-secondary students how Artificial Intelligence (AI) can be used to improve the lives of people living with disabilities. Student teams from diverse educational backgrounds used AI to create different apps, software, and tools to assist people with different accessibility needs. Teams were paired with professional mentors from TECHNATION and our partner Microsoft to assist them in developing their concepts.

The top teams were invited to the Microsoft Canadian Headquarters in Toronto to pitch their final concept to a panel of judges. The winning teams received cash prizes from TECHNATION, and Microsoft Surface products, courtesy of Microsoft Canada.
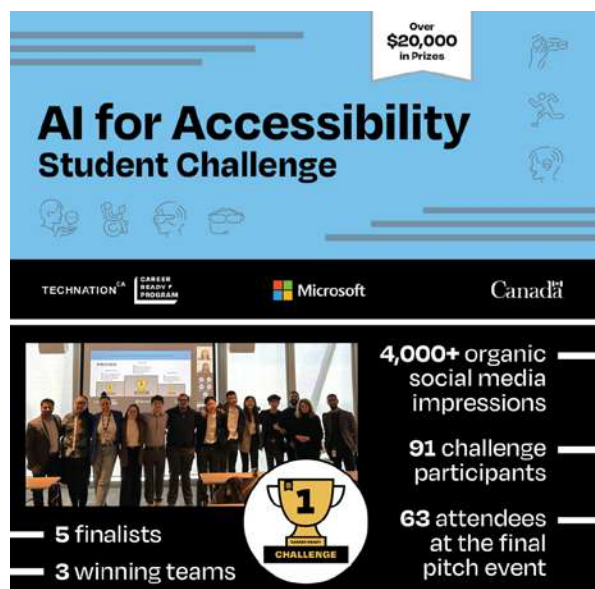


## Future of Work Taskforce

This Taskforce was designed for senior HR executives from member organizations to discuss some of the pressing Future of Work issues and challenges "off the record" and exchange insights, resources, tools, best practices and strategies for getting back to work post COVID and beyond.

These issues are not just about immediate "back to work" challenges. Topics the Taskforce focused on included longer term critical issues such as talent retention and acquisition/hiring, employee engagement, creating cultures of connectedness during remote/hybrid workplace models, mental wellbeing/stress/DEI etc. The hope is that we will be able to identify events or programs that TECHNATION can provide for members. Our shared goal is to help support the tech sector. This year two meetings were held in 2022-2023.

### Diversity, Equity and Inclusion (DEI)

**DEI is a long-term journey for most companies so there are ongoing initiatives that TECHNATION continues to be involved with including:**

- The **50-30 Challenge**, an initiative between the Government of Canada, business and diversity organizations, focused on improving access for women and/or non-binary people and other equity-deserving groups, including those identifying as: BIPOC, people with disabilities (including invisible and episodic disabilities), and 2SLGBTQ+ individuals.

- Partnerships with the **Canadian Aboriginal and Minority Supplier Council (CAMSC) and First Nations Technology Council, WEKH** (Women's Entrepreneurs Knowledge Hub),

**Toronto Metropolitan University**'s Diversity Institute (formerly Ryerson Diversity Institute) and **Women in Communications and Technology** (WCT) to ensure that our diversity programs and events are national in scope and grassroots driven.

- Collaboration with **ventureLAB** to support their TECH Undivided Program, an initiative designed to bridge gender and diversity gaps by better supporting under-represented entrepreneurs. TECHNATION provides introductory memberships for women tech founders who are part of the TECH Undivided Program to help them scale and grow.

- TECHNATION continues to be a supporting partner of the Council of Canadian Innovators (CCI) on their **Innovation Governance Program** (iGP), an executive education program that trains current and future board members for Canadian technology companies.

## Women in Public Sector Leadership Series

TECHNATION continued to promote the important role women play in the tech sector. Based on the national virtual series, Transforming the Public Sector with Tech-Savvy Women, we introduced the Women in Public Sector Leadership Series, a new event series designed to showcase female tech leaders in public sector IT roles.

Top female government IT leaders shared their vision, digital acceleration priorities and success measures for digital service delivery. They also discussed how industry and government collaboration is important to inspire the next generation and showcase career pathways in public sector IT for women.



Women in Public Sector Leadership event welcomed several prominent government officials including the Hon. Charmaine Williams, Hillary Hartley, Allyson Collymore and Dafna Carr pictured with Denise Shortt and Anna Leon.



*"I was excited to take part in TECHNATION's newly launched **Women in Public Sector Leadership** Event Series, which was designed to inspire the next generation of tech savvy female and underrepresented leaders in government. Our strategic partnership with TECHNATION and the ICT community continues to be key to the work we do across Ontario. By strengthening our understanding of each other's priorities, we can better use technology to drive digital transformation and deliver seamless, accessible and consistent services designed for Ontarians and businesses."*

**DAFNA CARR, Associate Deputy Minister**
**ServiceOntario, Ministry of Public and Business Service Delivery**

## Future of Work Event Series

**In 2022-23, we hosted three well-received Future of Work-focused events.**

**1.** In June 2022, we showcased the Future of Work Series: Spotlight on Toronto as one of North America's fastest growing tech hubs showing why Toronto is a draw for the world's top tech talent.

**2.** To celebrate October as National Disability Employment Awareness Month, we hosted Raising the Bar on Accessibility and Inclusion. This event featured top diversity and accessibility thought leaders who discussed how newly invented technologies could be leveraged to bridge gaps, create opportunities and equality and build a better world.

**3.** Our February 2023 event focused on Tech Trends and Tools for Reaching Online Audiences to look at how technology and social media has changed the game on how we work and play.



**3.** Denise Shortt, TECHNATION with Mandy Gilbert, Creative Niche, and Nemahsis



**1.** Angela Mondou, CEO of TECHNATION at opening of Amazon YYZ18 with John Tory, Mayor of Toronto, Eric Gales, President of AWS Canada, Bruce McCullough, Magda Grace, and Tamir Bar-Haim



**2.** Brendan Gramer, Senior Manager, UX/Design and Global President of AmazonPwD shared his personal experience as a deaf UX designer, together with his sign language interpreter, along with Celine Lee, Country Manager, Alexa Canada who was interviewed by TECHNATION member host Fawn Annan, CEO, IT World Canada highlighting ways to bridge gaps and create opportunities for inclusion.

# FORWARD LOOKING

**Looking ahead, TECHNATION will continue to work with its strategic partners and stakeholders on Future of Work/DEI programs and campaigns focused on:**

- Attracting and retaining the next generation of diverse tech talent;

- Showcasing the achievements of top female and diverse tech leaders in Canada;

- Supporting Canadian female-led tech companies to expand and scale globally.

For true impact, we recognize the importance of acknowledging and cultivating diversity.

At TECHNATION, we consider gender and diversity for all of our program development. Diversity metrics and accountability are integrated into all of our programs and initiatives. We are proud diversity champions and allies, and we will continue to work with our partners and stakeholders to help Canada's tech sector become more diverse in the years to come.

# FUTURE WORKFORCE DEVELOPMENT

TECHNATION's Future Workforce Development (FWD) division supports Canadian industry prosperity by connecting them to emerging talent and providing tools and resources to support the search and integration of their hires.

Our Career Ready Program has continued with a highly sought-after Work Integrated Learning (WIL) program which saw a two-fold increase in the number of TECHNATION members taking advantage of the program over the last year. Career Ready has also expanded to offer innovative programming placing students with TECHNATION members such as the successful Microsoft Explore Program, laying the groundwork for several new talent acceleration programs with our members.

This year, we were proud to fully introduce TECHNATION's LaunchPad, a new platform offering over 20 e-learning modules to equip employers and students with knowledge and resources to enhance and intensify the WIL-experience.

This breadth of this year's programming showcases what TECHNATION is capable of delivering at a national level, working with and supporting organizations of all sizes.

## Career Ready Program for 2022-2023

We are celebrating six years of funding from the Government of Canada's Student Work Placement Program (SWPP).

Although the minimum requirement for participation in this program is to operate a wage subsidy program, TECHNATION has gone much further, by supporting emerging talent with a fully developed WIL ecosystem comprised of labour market information tools, a learning management system, career fairs, skills development workshops, and much more. And after executing a comprehensive member outreach campaign, we are proud to be involving more TECHNATION members in this programming than ever before.

Kicking off our third round of funding in 2022, we focused heavily on diversity, equity, inclusion, and accessibility – working to help create and carve career pathways into Canada's digital workforce, especially for those less likely to secure jobs in tech.

Our continued commitment to fostering diversity in the tech industry has garnered praise from both our partners and the media. With media coverage in major outlets like IT World Canada and DailyHive, and over 6.25 million digital marketing impressions, TECHNATION's Career Ready Program continues to be a noteworthy and leading force in supporting the next generation of tech talent.

> ## TECHNATION is a great partner;
> **they've got access to relationships with various universities (and) great courses that are specifically targeted for students.**
>
> – Sumeet Khanna, Vice-President of Business Transformation and Strategic Initiatives, Microsoft Canada, *IT World Canada*, August 2022

**TECHNATION x Microsoft Explore Interns**
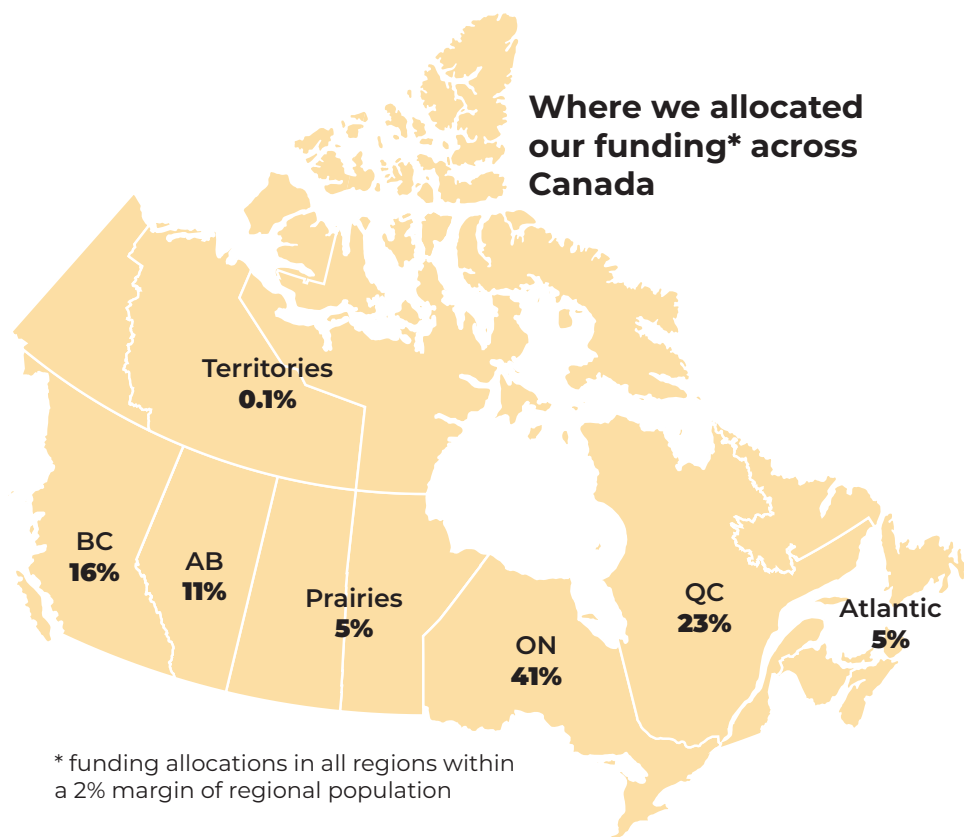Summer 2022

## Career Ready Spotlight

In the summer of 2022, TECHNATION and Microsoft partnered to launch the Explore program, a 10-week paid internship for 50 first and second-year students to gain technical and professional skills at Microsoft's Canadian headquarters in Toronto.

The program offered academic certifications, practical experience through a *Dragon's Den*-style competition, and mentorship opportunities with Microsoft leadership. Students were selected through the Career Ready Program student network. The cohort was comprised of folks who faced barriers to entering the digital workforce and helped to create and articulate career pathways for their future.

## Wage Subsidies

**$18M** in funds were awarded to employers across Canada, including **$1.2M** to **30 TECHNATION** members.

**70%** of our funding was awarded to under-represented groups including **82 Black** and **69 Indigenous** students.



**Where we allocated our funding\* across Canada**

Territories **0.1%**

BC **16%**

AB **11%**

Prairies **5%**

ON **41%**

QC **23%**

Atlantic **5%**

\* funding allocations in all regions within a 2% margin of regional population

## Career Ready Events 2022-2023

TECHNATION's Career Ready Program offers a wide range of events, from conferences and expert speaker sessions to student challenges as well as the Career Ready Awards to recognize excellence in WIL.

These opportunities provide a platform for students to expand their network, gain skills, and explore various career opportunities.

### We welcomed STUDENTS, RECENT GRADUATES, START-UP AND SMALL BUSINESS OWNERS, GOVERNMENT EMPLOYEES and INDUSTRY PROFESSIONALS to our events.

**15 events**
- 1 in-person
- 12 virtual
- 2 hybrid

**1,237 participants**
- 30 Indigenous people
- 229 newcomers to Canada
- 55 persons with disabilities
- 229 visible minorities
- 229 women in STEM

### Top 5 employment sectors supported by Career Ready

- Technology (engineering, coding, IT, etc.)
- Business
- Artificial Intelligence/Internet of things (IoT)
- eCommerce
- Health



TECHNATION<sup>CA</sup> FUTUREWAVE

March 2-3, 2023
Vancouver and Virtual

- 6 panels
- 9 members
- 29 speakers
- 759 registered attendees
- 163,786 social media impressions

## Event Spotlight: FutureWave 2023

FutureWave demonstrates TECHNATION's commitment to fostering a culture of Work-Integrated Learning (WIL) in Canada. FutureWave 2023 was a free, two-day hybrid event hosted at the Microsoft Canada Waterfront Office in Vancouver. The event, which included 9 TECHNATION members, provided a platform for diverse voices in tech and beyond to explore the future of the tech workforce in Canada. With more than 750 registered attendees and a significant online presence generating more than 163,000 impressions, FutureWave brought industry, academia, and government together to reimagine and activate our future workforce.

## CareerFinder for 2022-2023

TECHNATION's CareerFinder continues to provide reliable, quality analytics on Canada's labour market. Over the last year, 30,000 users visited the platform to access the suite of tools. Most users explored data and resources related to high-growth sectors such as cybersecurity.

In late 2022, we established a Stakeholder Advisory Committee, comprised of 13 participants across various CareerFinder 'user personas' (students, employers, reskillers, parents, career services professionals, etc.) to begin compiling data and recommendations for improvements to the platform next year, leading to the introduction of CareerFinder 2.0.

## LaunchPad for 2022-2023

TECHNATION's LaunchPad offers WIL-related resources for student and employer stakeholders. Employer Readiness modules enhance and intensify the WIL experience at the employer level. The Student Readiness modules helps student acquire the industry-coveted skills necessary to excel as they enter the digital workforce.

LaunchPad awards a digital badge for each module and contains over 100 resources, tools and templates that can be downloaded and adapted.

**Highlights from this year include:**

- 10 new employer ready modules were launched.
- There were over 88,000 unique visitors to LaunchPad with 121,000 sessions. Of these sessions, 95% were visitors from Canada.
- 100% Canadian-made content sourced from collaboration with 5 subject matter experts and course development teams, all from Canadian small and medium size enterprises.
- 145 students completed over 300 Student Ready modules and two-thirds were from under-represented groups.
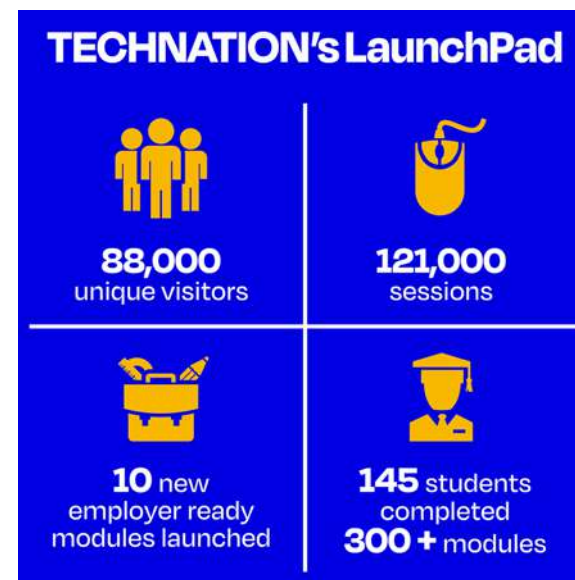
## ADaPT for 2022-2023

Learning how to navigate the job market and network with potential employers can be intimidating for recent graduates and newcomers to Canada. TECHNATION and the Ted Rogers School of Management's Diversity Institute continued to collaborate on the successful Advanced Digital and Professional Training (ADaPT) Program.

Geared toward recent graduates, ADaPT is a free digital and professional skills development program that takes an inclusive approach to supporting and creating new opportunities for underserved groups looking for future tech-enabled roles.

Through ADaPT, participants receive training to gain in-demand skills and learn how to boost their confidence. By connecting with like-minded peers and top employers, participants can successfully build their professional network and increase their competitive edge in today's labour market!

Since 2014, over 1,000 participants passed through ADaPT. During this past fiscal year, and the second year of the program's extension, ADaPT has engaged various under-represented groups.

| Under-Represented (UR) Group | Number of Participants | Percentage of Participants |
|---|---|---|
| 2SLGBTQ+ | 38 | 8% |
| Indigenous | 2 | 1% |
| Newcomers to Canada (within 5 years) | 81 | 17% |
| Persons with disabilities | 36 | 7% |
| Visible minorities | 155 | 32% |
| Women in STEM | 178 | 36% |
| Total | 490 | 101% |

Notes: There were 490 ADaPT participants from under-represented groups during the 2022-23 fiscal year.
Percentages will not add up to 100 because participants can self-identify across one or more categories.

# FORWARD LOOKING

With many of our multi-year programs (Career Ready and ADaPT) ending next year, we are focused on renegotiating funding with governments and ensuring our programs are sustainable. Budget 2023 was very promising for FWD programs, having announced continuity for initiatives like the Student Work Placement Program and Canada's 5 Global Innovation Clusters – we see a lot of future opportunities to continue the important work we have started.

**A few key milestones we look forward to completing next year:**

• Launch of CareerFinder 2.0 with several enhancements and introduction of a skills tracking tool.

• Crafting proposals to implement ideas for new programs in alignment with industry/member needs and in response to government solicitation.

• Execute several new talent acceleration programs in partnership with our members.

# HEALTH

TECHNATION continues to advocate on behalf of our members emphasizing the continued use of health information (HIT) and health information management (HIM) to achieve success in collecting, sharing and the utilization of health data for the benefit of all Canadians throughout the Canadian health ecosystem.

The COVID-19 pandemic has significantly increased the need for timely and accurate health data and has shown that virtual or digital care enables better access and health outcomes for Canadians and the overall Canadian healthcare ecosystem. With the rapid advances and utilization of newer technologies such as Artificial Intelligence (AI) and Machine Learning (ML) tools, a more virtualized Canadian healthcare ecosystem will be inevitable. Further adoption of digital health tools and solutions will assist in bridging gaps, addressing ongoing challenges/barriers and coordinating efforts for provincial health data sharing and interoperability.

Throughout the year, TECHNATION Health leaders, board directors and committee members, connected directly with federal, provincial, and local government officials to increase a focus on, and investment in, Canada's healthcare system. Key asks to governments in the 2022-2023 fiscal year included:

- Increased investment in provincial and territorial transfer payments to further support digital health innovation needs;
- Continued funding to government agencies and organizations focused on digital health;
- Continued investment in the Pan-Canadian Health Data Strategy led by Canada Health Infoway and Health Canada;

- The selection, development, and implementation of nationally and internationally accepted health data and interoperability standards;
- Increased focus on cybersecurity, for the continued safety, privacy and accessibility of health records;
- Investments in the critical expansion of Artificial Intelligence (AI) and Machine Learning (ML) that are specific to healthcare and a more virtualized healthcare ecosystem.

TECHNATION Health also hosted events on behalf of health ministry officials, and has been asked to provide members recommendations into strategies and new regulations. Over the course of this year, we continued to see increased interest from provincial health ministries to engage with TECHNATION for member input into their strategies, new and revised policies, and regulations specific to Digital Health.

There has been a significant increase in requests for input since the Federal Government's November 2022 announcement of significant additional funding to the Provincial and Territory Ministries of Health in addition to Canada Health Infoway's work with Health Canada for investment in a National Data Sharing and Interoperability Initiative.

## TECHNATION Health Consultations / Events

Recommendations on behalf of members were submitted to the following ministries and organizations.

Monthly scheduled meetings with Ontario MOH Digital Health Team

Monthly scheduled meetings with Canada Health Infoway Team

Canadian Health Information Management Association (CHIMA) – Presented to the TECHNATION Health Board on June 14, 2022 – 14 attendees

OntarioMD – October 24, 2022 – 39 attendees

Meetings with Canadian Space Agency – Healthcare Beyond – September and October 2022
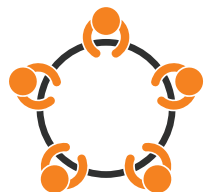
Ontario Health eReferral/ eConsultation Webinar – November 14, 2022

Digital Health Cluster, Ontario Ministry of Economic Development – February 23, 2023

# IMPACT

**Health Committees** focused on influencing policy, and Canadian healthcare systems, interoperability, standards and processes.

**Held 17 Health Committee and Board meetings in the 2022 -23 fiscal year engaging nearly 200 members**
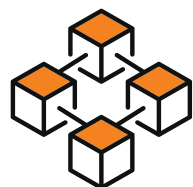
**Health Tech Talks Event Series** – focuses on digital health technologies impacting Canada's healthcare sector and systems. Members present their experts and expertise on a wide variety of topics.

**Over 30 Federal, Provincial and Territory Health Ministries and Agencies attending each event.**

**8 focused Health-led events** with over 1,000 TECHNATION member participants.

**Digital Health Queen's Park Days**
March 27 & 28, 2023

**6 meetings with senior government officials**

**More than 11 member participants advocating for investment in digital healthcare technology.**

Focused on data sharing & interoperability, digital health accessibility gaps, home care, long-term care, revision of digital health strategies, financial investment, and more.

# FORWARD LOOKING

TECHNATION Health will be focusing its efforts starting this year on working directly with Provincial and Territorial Ministries of Health, Canada Health Infoway and Health Canada on the National Data Sharing and Interoperability Initiative. With the increased use of virtual care, the need for safe and efficient electronic sharing of data across Canada's Health ecosystem has become the focused interest for all levels of government ministries of health, along with the funding announced to support this initiative by the Federal Government back in November of 2022. This will involve working with all stakeholders to provide meaningful industry input into ongoing revisions of Digital Health strategies, policies, and regulations, providing our members the most current up to date information and business opportunities that will result.

In addition, the Health Advocacy Committee will focus on working with stakeholders to discuss and develop further efficiencies through the use of Digital Health Technologies, such as Cloud Computing, AI and ML. We will continue with our collaboration efforts on standards, interoperability and cybersecurity within the Health ecosystem, through our membership engaged on the Interoperability and Standards Committee. These focused efforts will emphasize the importance of continued investment in Digital Health tools and virtualized healthcare across Canada which will result in more opportunities for our members to provide products and services in Digital Health across the country.

We will be hosting several Health Tech Talks this coming year. These events have proven to be of great value to our participating members as well as to ministries' Digital Health Teams across the country, who are provided a deeper dive into many topics and issues around specific technologies and their usefulness in their jurisdictions and regions. Our members are provided the unique opportunity to position themselves as experts in focused areas of interest and are provided with the opportunity to present directly to those who influence purchasing decisions.

And finally, now with the COVID-19 travel restrictions being lifted, we will be able to host more networking events for our members, such as the Canadian Reception at HIMSS! Networking events have been signature events for our members in the Canadian Health Tech market so we look forward to seeing more of everyone over the coming year!

# EVENTS

As both industry and government adapted to hosting virtual events during the pandemic, we were thrilled this past year brought the return of in-person events as everyone recognized the benefits of networking and collaboration opportunities through live events. Virtual is here to stay, so our national reach is more extensive than ever before and gives members access to government and other leaders across the country.

TECHNATION events have long shown our advocacy efforts, highlighted opportunities for partnerships, and showcased our member leaders in impactful ways – and our members, government officials at all levels and industry leaders participate in ways we wouldn't have expected. This past year, we continued offering our Executive Briefings with key government leaders, our bi-annual Ontario Government GovTechON events along with our Broader Public Sector events, and hosted the popular CIO Briefings Series in BC, Prairies and Atlantic Canada.

We also launched new events including EDGE (Enabling Digital Government for Everyone) and our Health Tech Talks. Through our new Digital Health Briefings, we kicked off with the BC Provincial Health Services Authority. Another highlight this year; we hosted our first Industry Day with federal government leaders to discuss Government Adoption of Cloud & Intelligent Automation in-person in Ottawa in September 2022.

TECHNATION events provide opportunities to hear from industry thought leaders on key areas of interest to the tech sector, including many of our priority areas such as advocacy and policy, industry development, future of work, diversity, equity and inclusion (DEI), cybersecurity, health, future workforce development, procurement and more.

**43** TECHNATION EVENTS
**3,838** ATTENDEES

**79** COMMITTEES /WORKING GROUPS
**1,569** ATTENDEES

**7** CONSULTATIONS
**270** ATTENDEES

**7,740** RECEIVE OUR EVENT NEWSLETTER

# FORWARD LOOKING

With increased volatility in the Canadian economy, our focus will be to continue to deliver events that have been identified as high priority through our membership survey such as CIO and Executive Briefings with government leaders. Some of the events to look out for this year are:

- Our Pan-Canadian series will continue with CIO Briefings reaching into new regions across the country. Our first Broader Public Sector CIO Briefing will host municipal leaders.

- Our Digital Health Briefings will continue with Alberta Health Services and beyond to Yukon/Northwest Territories and Atlantic Canada.

- Our next Federal Industry Day will focus on Delivering Value through Procurement – Re-imagining How Government Buys.
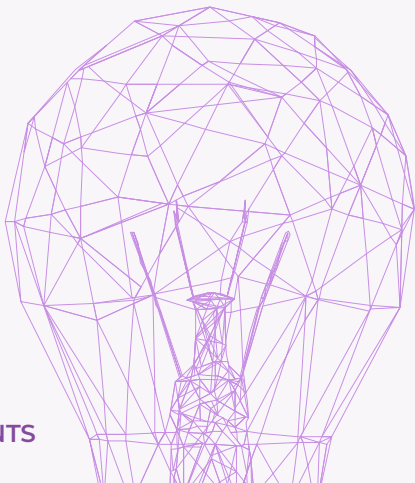
TECHNATION **INGéNIOUS** AWARDS

TECHNATION re-launched one of our flagship events this year, the Ingenious Awards, with refreshed nomination categories – four technology categories and two individual awards – Public Sector Disruptor of the Year and the Canadian Tech Hall of Fame. TECHNATION partnered with IDC Canada and CIO to co-host the 2022 award program expanding the nomination categories and opportunities to honour innovative technology use in Canadian organizations. The CIO 50 Symposium & Awards Canada conference in November featured not one, but two award shows – TECHNATION Ingenious Awards and the CIO 50 Canada Awards.

The 2022 winners ranged from delivering fast and effective point of care and digital diagnosis, to bringing next-level 3D ART and tech to the metaverse and on chain experiences leveraging WEB3 technology. Another winner moved an extensive multi-tiered IT environment from on-premise to the cloud while another winner leveraged smart home devices to enhance access to regional government amenities and better delivered programs and services to customers. The final winner utilized advanced data analytics, machine learning and text mining techniques to "mine" the past.

TECHNATION celebrated six private and public sector leaders in Blockchain technology, AI, Cloud, and IoT along with honouring Canada's Public Sector Disruptor of the Year and the first Canadian Tech Hall of Fame Award winner.

## Tafi

Tafi took home the **BLOCKCHAIN AWARD** for overcoming the challenge of creating and executing a blockchain project that would work properly, get attention and set the track for success with innovation in Web3 projects.

## Alēthea

The **AI AWARD** recognized Alethea Medical for their eConsult and AI diagnostic platform helping family physicians better diagnose and treat patient conditions.

# Ontario ⚜

The [Ontario Ministry of Transportation](#) transitioned from a mid-tier server environment, encompassing over 180 servers, 65 databases and 32 business software applications successfully to the cloud to win the **INGENIOUS AWARD FOR THE CLOUD**. The mid-tier environment provided online services and hosting for both internal and public facing solutions that supports approximately $1.98 billion CAD in government revenue annually. It provided the main data exchange interfaces between Ontario Ministry of Transportation and other provincial ministries, as well as 100 external organizations like police services, the Insurance Bureau of Canada (IBC), the Canadian Border Security Agency and Service Ontario.

The [Regional Municipality of Durham](#) located in the province of Ontario was the winner of the **IoT TECHNOLOGY** category for their myDurham 311 Smart Home Device Voice Service. One of myDurham 311's goals was to ensure residents had many ways of interacting with regional services by using an omnichannel approach – a coordinated system that ensures regional services are accessible through a variety of channels.. This tool helps customers access information and frequently asked questions, through their smart home devices.

The Ingenious Award winner for the 2022 **PUBLIC SECTOR DISRUPTOR OF THE YEAR** was **Ryan Hum**, Vice President, Chief Data & Information Officer, Canada Energy Regulator. Over the last two years, the [Canada Energy Regulator](#) (CER) embarked on a strategic priority to drive data and digital innovation in the organization using advanced data analytics, machine learning, and text mining techniques to "mine" the past.

The newly launched **CANADIAN TECH HALL OF FAME AWARD FOR 2022** went to **Tobias Lütke**, Co-Founder and CEO of Shopify who was selected by the Ingenious Awards voting committee. This new annual award recognizes and celebrates the accomplishments of Canada's most distinguished technology leaders who represent founders of truly disruptive technology who have elevated Canada's reputation as a technology leader on the global stage.

# MEMBERSHIP

Members are at the core of TECHNATION. As a leading industry association, TECHNATION creates a multitude of ways for members to participate including opportunities for collaboration and advocating for change. Our three boards including National, Ontario and Health along with our committees, working groups and taskforces ensure our members voices are represented at all levels of government.

The last year has been challenging for the tech industry and many of our members. During these uncertain times, TECHNATION's leadership for Canada's tech sector is even more important especially around rapidly evolving issues and topics.

TECHNATION saw an increase in new members this year despite challenging economic times for the Canadian and global tech industry. Our member retention rates among our medium and large sustaining members are at their strongest levels since before the pandemic demonstrating strong value in our strategic priorities.

New members of all sizes, from Canadian SMEs to large multinational organizations, have joined TECHNATION to access a variety of opportunities from policy advocacy to trade missions and ways to grow their businesses. TECHNATION works closely with new members through our new member onboarding program. This ensures they are able to engage in areas that provide them with the highest member value and contribute to the growth of the tech industry in Canada.

To ensure we continue providing the programs and advocacy that our members want, TECHNATION's annual Member Survey results confirmed that we are on the right track and our strategic priorities are focused where they should be.

## Highlights from the 2022 Member Pulse Survey

### TOP STRATEGIC PRIORITIES FOR MEMBER ENGAGEMENT

**Government & Digital Transformation**
**51%** very or extremely engaged

**Industry, Prosperity & Growth**
**41%** very or extremely engaged

### TOP ISSUES FACING MEMBER ORGANIZATIONS*

**39%** Public Sector Procurement

**30%** Talent Acquisition/Retention

*\* Noticeable changes over our 2021 survey that indicated talent was top challenge (27%) followed by procurement (18%)*

**The most popular programs, events and committees** as ranked by our members include our Federal and Ontario Public Sector Business Committees, Executive Briefings, GovTechON, Broader Public Sector CIO events, public sector working groups, policy and national CIO events.

## New This Year

TECHNATION continues to connect with members through regular surveys, evaluations, quarterly member webinars and one-on-one member calls. In addition, over the past year we have increased member-driven programming and improved new member benefits.

We have launched Federal and Ontario Value of Procurement Working Groups and Industry Days.

### Federal and Ontario Value of Procurement Working Groups

These two new member-driven working groups were launched in 2022 to update, consult and advise TECHNATION's Government Relations & Policy (GR&P) team with recommendations for modernizing the approach to government procurement to provide policy direction, ensure equitable opportunities for all companies, and deliver value for Canadians.

### Industry Days

TECHNATION is committed to driving change and promoting collaboration between the public and private sectors in Canada. To achieve this goal, TECHNATION now hosts Industry Days bringing key government leaders and industry together to dive deeply into the issues of tech adoption and government procurement. These dedicated events explore ways that Canada's tech sector and government can collaborate to accelerate government technology modernization. Industry Days take place in-person behind closed doors and include Ministerial keynotes, executive panels, and breakout sessions where government and industry leaders tackle challenges around dedicated topics and develop key recommendations to resolve or remove roadblocks to adoption.

**If you want to learn more** about these activities or more about opportunities for engagement, please reach out to our membership team at memberservices@technationcanada.ca

# FORWARD LOOKING

In 2023-24 TECHNATION will continue to advance the technology industry in Canada through engagement with members to keep abreast of their priorities through cadence meetings, regular surveys, and member update events. This includes meetings at the highest levels of our members' organizations to ensure we are aligned with the priorities of our members.

With the return to in-person events, members are encouraged to actively engage, network, and build relationships through our events, programs and meetings that help all participants learn more about the opportunities, trends and challenges impacting the Canadian tech sector and our national economy.

We recognize that this is an especially volatile period for the tech industry, so our priority continues to be focused on delivering value to members. This year, we are also focused on growing and diversifying our membership base in addition to retaining long-standing members to ensure TECHNATION remains resilient and representative of Canada's tech industry. There is strength in numbers when driving critically important digital transformation initiatives in Canada and, as the leading technology association in Canada, we are in a great position to drive this change.

# TECHNATION LEADERSHIP TEAM & BOARDS OF DIRECTORS

**Our passionate leaders bring a diversity of experience and expertise in supporting and governing TECHNATION.**

TECHNATION is governed by a National Board of Directors comprised of members and are responsible for overseeing TECHNATION's strategic direction.

There are also the TECHNATION Ontario Board of Directors and the TECHNATION Health Board of Directors. They, like the National Board, are responsible for articulating the mission, accomplishments and goals of their respective areas to the public, and for garnering support through advocacy.

*TECHNATION appreciates the dedication, passion and support of all of its board directors, both those who serve and have served on its Boards, during the 2022-2023 year.*

**TECHNATION Senior Leadership Team**

**National Board of Directors**

**Ontario Board of Directors**

**Health Board of Directors**

## JOIN TECHNATION TODAY AND ENJOY KEY MEMBER BENEFITS

▶ Act as the Industry – Government Nexus for Canada's ICT companies

▶ Deliver programs that drive 'access' and create business opportunities for technology companies in Canada

▶ Drive national productivity and competitiveness through digital workforce readiness

▶ Influence health policy on behalf of members, focus advocacy efforts towards nationally accepted standards, and support the adoption of innovative health technologies

▶ Collaborate with other national organizations to create and deliver programs that will engage our membership's unique capabilities to enable digital transformation across all sectors in Canada and focus on critical challenges and enablers to ensure national prosperity

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