



**British Columbia's Green Economy:  
Securing the Workforce of Tomorrow**

**Regional Focus Group Summary**

2010



## About the GLOBE Foundation

The GLOBE Foundation of Canada is a Vancouver-based, not-for-profit organization dedicated to finding practical, business-oriented solutions to the world's environmental problems.

Formed in 1993, we've helped companies and individuals realize the value of economically viable environmental business opportunities through our conferences and events, research and consulting, project management, communications and awards program.

We're a leader in championing green initiatives and leveraging sustainable ventures into mutually rewarding opportunities for enterprise and the environment. From urban sustainability to climate change, we're helping change the world by degrees.

For more information on the GLOBE Foundation, please visit our website at:

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## About the Focus Group Sessions

The GLOBE Foundation hosted a series of regional focus groups throughout British Columbia to help uncover provincial policy issues and labour market challenges related to BC's emerging green economy. A total of nine sessions were held in six of the eight economic Development Regions during the months of April to June 2010. The sessions were attended by a total of 82 participants.

The 2.5 hour sessions were comprised of key stakeholders from the private, public, industry, NGO, and education/training sectors. Session sizes varied throughout each region, but aimed to have between 8 and 12 participants representing various backgrounds and expertise.

Focus group findings are presented in the following sub-sections. While many of the regional messages apply to all parts of BC, some are very location-specific. It should be noted that the key messages reported in this document do not necessarily reflect the opinions of the GLOBE Foundation.

**The objectives of the focus groups were to engage key labour market stakeholders in BC's green economy in order to:**

1. Uncover provincial policy issues that are acting to hinder the growth of the green economy and the wide-spread adoption of green technologies in each region;
2. Uncover labour market supply/demand issues, needs, and skill gaps for industries as they relate to the emerging green economy in each region; and
3. Prioritize a set of realistic recommendations that could be brought back to the province in order to assist businesses and public institutions in each area to further the green economy and address some of the described policy and labour market challenges.

## Summary Points from the Focus Group Sessions

- **BC's cheap energy acts as a barrier to lower-carbon energy development and deployment** – Natural resources in BC, including electricity and natural gas, are priced too cheaply and act as a disincentive for companies and individuals to change their habits or to embrace renewable energy and cleaner, more energy-efficient technologies. Additional measures, including incentives and grants, should be considered to help offset this reality and encourage the development of clean and renewable energy technology alternatives.
- **Long-term funding and programming is essential for developing the green economy** – Attention must be given to supporting long-term policies, programs, and funding arrangements for renewable energy and energy efficiency. Programs such as LiveSmart have been irregular and this has created uncertainty in the marketplace with respect to demand and supply capacity. Funding for advanced education and applied research is key for technology R&D, commercialization, and for developing the green labour force.

- **Incentives are needed in the early stages to transition to a greener economy –**

Strong incentives are needed to promote renewable energy development and the decentralization of electricity generation. One of the most often repeated suggestions was for a well-structured feed-in-tariff for renewable energy as a means to build local market demand which in turn would create new jobs. Other suggestions included the adoption of policies that require local content in certain projects, or long-term supply contracts that allow green companies to strengthen their market presence.

- **Permitting and regulatory processes are uncoordinated and need to be streamlined –**

Permitting and application processes are very time consuming and need to be streamlined and coordinated at all levels of government to speed up the process. In addition, the environmental review process needs to be streamlined to eliminate unnecessary and costly duplication. Greater attention should be paid to First Nations concerns and issues, and to ensure First Nations participate as full partners in decision making that affects their communities and their general well-being.

- **Building codes need to be harmonized and accommodating to new technologies**

– There is a need for increased flexibility in building codes to allow for new technologies to be tested and certified for use in retrofits and new green building. Greater harmonization of federal, provincial, and

municipal building codes should be considered and measures put in place to reduce risks for utilities or municipalities when adopting new technologies for municipal infrastructure improvements.

- **The K-12 education system must be made a priority for advancing the future of the green economy –**

A fundamental element in the process of changing societal values to be more in-tune with the imperatives of the green economy is to educate tomorrow's citizens to this end. The educational curriculum for K-12 students needs to have a mandatory component that focuses on environmental sustainability and lower-carbon lifestyles and awareness should be increased at the high school level in-line with the growing opportunities in a greener economy.

- **The long-term vision and the opportunities must be clearly communicated to all stakeholders –**

The vision of what constitutes a green economy differs from one region to the next and there are widely divergent viewpoints with respect to priorities and programs to achieve a lower-carbon future. The government must work harder to convey a clear and consistent long-term vision of what constitutes the green economy, and why it is needed.

## Summaries and Key Messages by Region

Regional focus groups were held in the following Development Regions: Vancouver Island/Coast, Mainland/Southwest, Thompson/Okanagan, Kootenays, Cariboo, and the Northeast. Below is a summary of regional issues and the resulting key messages.

### Vancouver Island/Coast

#### Locations: Victoria & Nanaimo

Parts of the Vancouver Island/Coast region have been pushing low-carbon projects for some time, while others have yet to recognize the opportunities. Like most of the province, this region has suffered from inconsistent policies, standards, and a lack of fundamental understanding of what the green economy is and why it is important. Residents of the Vancouver Island region feel a certain sense of exclusion from the larger population and economic centres found on the Lower Mainland as a result of the physical separation between these regions.

The Vancouver Island/Coast region possesses some of the most diverse and abundant renewable energy opportunities in the world, yet only a handful of projects currently exist. The fact that Vancouver Island currently imports approximately 90 to 95 percent of its electricity from the Mainland at a great cost presents an even stronger case to develop regional clean power projects. Stakeholders in the focus group sessions noted that the lack of feasibility studies for such projects is proving to be a major barrier to capitalizing on their renewable resources. The construction of projects such as the landfill biogas plant in Nanaimo, the T'Souke First Nations solar community in Sooke, the tidal generation trial near Campbell River, and the district energy system constructed at Dockside Green in Victoria are all important, but there is still a widespread lack of adoption and understanding in the surrounding communities.

The creation of local markets for sustainable technologies and renewable energies was identified

as one of the biggest opportunities for Vancouver Island and the surrounding coastal communities.



This effort will require a multi-faceted approach, but will provide the region with long-term economic and environmental prosperity, independence, and empowerment. Local municipalities were encouraged to re-visit their purchasing policies to take into account lifecycle costs of their products and services as well as the regional economic value and impact each contract could provide. This purchasing power can help build capacity for clean technology companies in the area and help drive demand for local products and services.

The presence of many First Nations' communities on Vancouver Island and the Coast gives the region the extraordinary opportunity to build local, sustainable economies while providing long-term, low-carbon, economic opportunities to a demographic which is experiencing population growth. Many First Nations communities have already created their own Energy Plans, but had not been previously supported in these endeavours until the recent inclusion into the new provincial Clean Energy Act.



### **Key Messages from the Vancouver Island Focus Groups**

- Green building represents a major area of opportunity for communities on Vancouver Island. However, stronger regulations and guidelines are needed with respect to the use of green building technologies in order to create greater consistency with municipal building codes. There needs to also be a greater dissemination of best practices information within the industry to workers, supervisors, and managers alike. One way to help achieve this is to incorporate green building technologies into local building codes, similar to what is undertaken by the Building Standards Branch.
- Community colleges and other training institutions could become active centers for the development and deployment of renewable energy and green building technologies. Their very physical plant could serve as product proving grounds that would help showcase these technologies to the general public and to the business community. Camosun College's "Sustainability Village" concept is a case in point.
- Providing municipalities and other local communities with the tools and the funding needed to reduce their GHG emissions would allow them to implement innovations best suited to their specific strengths and needs. It is recognized that this should be part of a long-term program that spans all regions of the province. Part of this programming could involve upfront incentives to allow for initiatives that allow for GHG emissions reductions through the adoption of renewable energy technologies and distributed energy systems where these make sense.
- One of the sad realities is that Canadians seem reluctant to buy innovative technologies from Canadian companies. There are tremendous opportunities available through the use of local government purchasing policies that encourage purchases from local suppliers and companies. Various approaches can be tried in this regard, including the use of Public-Private Partnership arrangements. These might be supplemented by provincial government support measures that reduce or eliminate possible risks.
- The First Nations community has not been able to share in the potential benefits of the green economy, and there is a great need to ensure that First Nations are involved in every policy and program development initiative that could affect their future well being.
- In particular, there is a great need to expand skilled trades and apprenticeship training for rural and Aboriginal communities, bringing the learning resources closer to them rather than requiring students to re-locate to distant urban centers.
- The First Nations of BC project a demographic reality quite different from all other components of the province's population. This population is growing with an average age much younger than the general population of BC. More than any other segment of the population, First Nations youth require training to secure the jobs that will help sustain the green economy.

## Mainland/Southwest

**Location: Chilliwack & Burnaby**



The variability in geography and population density across the Lower Mainland creates very different economic and business realities in this region. The focus group session held in Chilliwack provided insight into the more rural nature of the Fraser Valley, while the Burnaby session served as a more urban forum for identifying green economy and labour market opportunities and challenges. The Burnaby session also consisted of participants who came from neighbouring municipalities within Metro Vancouver to discuss some of the opportunities and challenges which are present in other parts of the region.

Chilliwack and the surrounding Fraser Valley have a strong reliance on farming and agriculture for economic development and employment. Local agriculture is gaining recognition in the green economy for its role in providing food security for the province as international food markets become increasingly competitive and under pressures from climate change, droughts, and growing populations. The fertile Fraser Valley is a large producer of raw foodstuffs, but currently lacks the infrastructure and incentives to process a high percentage of these products locally, and as such, producers currently ship food items to distant processing and packaging plants in the US, resulting in a large environmental footprint from GHG emissions in transportation. There is interest in bringing some of this processing closer to home.

Many of the small business entrepreneurs who participated in the discussions raised concerns over the lack of coordinated permitting and environmental assessment processes and the burden that these cause to local start-up companies. While each participant had varying opinions, all agreed that the current system is inefficient, time consuming, and acts as an barrier to establishing and growing green and clean energy companies in the region.

The mix of representatives from academia and SME's at the Burnaby meeting identified increased collaboration between the public training institutions and the private sector as a major opportunity for accessing potential economic spin-offs.

Partnerships between emerging clean technology companies and the training institutions who supply the labour force were identified as crucial but in need of more effort on both sides for better collaboration. Funding support from the various levels of government was highlighted as critical as the cost to businesses of training students through co-operative education experiences or internships creates a serious challenge to small businesses, especially if the students do not remain with the firm following their graduation.

Entrepreneurs and business executives from organizations based in the Lower Mainland provided valuable insight into some of the barriers which new start-up R&D organizations face on their path to commercialization. The most difficult part of the business cycle for these emerging companies is the commercialization phase or deployment of their technologies. Perceived risks often keep venture capitalists from investing at this early stage, which creates an inhospitable environment for young start-ups to establish themselves, both in the Lower Mainland and across the province. Measures to address these issues and increase commercialization of green technologies was seen as critical.

### **Key Messages from the Mainland/Southwest Focus Groups**

- To help speed up and simplify the establishment of new green companies and projects, businesses would benefit from a single access point or “one-stop” shop to the various ministries and governing bodies which regulate environmental assessments and the various permitting processes.
- Food security is becoming an ever increasingly important issue, and the region should be doing more to promote local production and encouraging the establishment of companies who are able to help “close loops” in the supply chain and add to value to their products.
- The establishment of a green technology business network would help develop local partnerships and create a more productive environment for innovative companies pushing the envelope on sustainability. A regional Center of Excellence in green agriculture and/or clean technology would help foster these relationships and provide opportunities for collaborative research across various industries and training institutions.
- Emerging green technology companies need to have access to capital during the pre-commercialization phase of their business cycles, and the re-introduction of a program such as the original “Science Council” would help young companies in their efforts to commercialize their products.
- Government funding can provide an important role to developing a framework used to establish partnerships between training institutions, their students, and green technology companies. Current models do not provide a cost and time effective system for companies to access students and provide them with the skills needed to become a productive member of the labour force.
- BC should better communicate its vision of the green economy and be prepared to “pick winners” based on the strengths and realities that the province has to offer. Without clear and defined goals of which sectors show the best comparative advantages, companies and training institutions must cope with uncertainty, as changing political directions and policies can inhibit growth and success.
- To create strong export markets, BC must first build a strong domestic market. This will require the assistance of municipalities to provide a test-bed for unproven and emerging technologies and to incorporate public procurement strategies for local green products/services. Supporting local companies will ultimately build stronger BC businesses and provide regional employment opportunities in the green economy.



## Thompson/Okanagan

### Location: Kelowna

The Okanagan Valley is a popular location for retiring baby-boomers. This demographic reality appears to be directly tied to a number of labour market opportunities and challenges identified by this region.

The region is benefitting from a “brain gain” as many senior-level, highly-experienced individuals are moving to the region. While this older generation offers great potential for training junior employees and sharing their management expertise, there is also an inevitable gap opening up as this cohort embraces retirement.

The Thompson and Okanagan Valleys are ideally situated to use renewable energy technologies, most notably solar and geothermal, however, they currently see a lack of demand from consumers. While the absence of financial incentives were identified as one reason, poor public education and a lack of awareness for new, greener technologies were also identified as partially responsible for the low demand.

The aging population is generally familiar with traditional sources of energy and building practices and lack an avenue for exposure to newer sustainable technologies and the benefits associated with them. This lack of demand has been felt in the industry and in the education/training sectors, where environmentally-aware students are abundant but a lack of employment opportunities are present upon graduation.

The region has also seen rapid, unchecked growth that has led to urban sprawl and a lack of well-designed infrastructure and community developments. Several municipal councils in the region are seeking out opportunities to incorporate green building and renewable energy technologies into their communities, and local industries and schools are keen to do their part to enable the adoption of these sustainable technologies. However, government policies that are not enforced at the municipal level result in a lack of implementation due to existing cost barriers.

### **Key Messages from the Okanagan Focus Group**

- Stronger, legislated provincial and municipal green building targets, incentives, and codes are needed to stimulate growth in the green building sector, along with better enforcement of these measures.
- Local, provincial, and federal building codes need to be harmonized to complement each other and to enable new green building and renewable energy technologies to be incorporated into new structures and in major renovations. Associated measures could include an accelerated program for product testing, facility proving, and streamlined regulatory processes to reduce building code restrictions and construction delays.
- One incentive to consider could be providing HST exemptions for green buildings and homes that make use of energy efficient products. An EnerGuide-styled audit requirement could be used to verify the qualifications of buildings for such an exemption.
- The older population base of the region would benefit from a program that enables home energy/efficiency retrofits, with the up-front costs subsidized through Power Smart-type incentives.
- Development Cost Charges (DCC) have certain limitations in terms of what can be funded. Providing certain allowance from DCC's for green buildings and distributed energy systems could prove useful as stimuli for growth of the local supplier community.
- The region is still heavily dependent upon private vehicular transportation, which is both expensive and inefficient. There is a need to provide more funding for alternative transportation options (e.g. light rail corridors and increased public transit systems).



## Kootenay

### Location: Castlegar

The Kootenay region has been historically dependant on resource-intensive industries and these assets were once again at the centre of conversation during the focus group in this region. The traditional sources of employment and wealth for the region have been in forestry and mining, both of which are heavily dependent on consuming large amounts of water and energy. There was concern that climate change and water shortages will threaten the well-being and future prosperity of the region. The lack of water metering throughout the three municipalities acted as a barrier to conservation efforts and contributed to the difficulty in funding local infrastructure upgrades. While some areas in the Kootenay region have been experiencing water shortages, the lack of proper filtration and treatment was also identified as a challenge for many smaller communities.

While most of the region is serviced by Fortis BC for its electricity needs, Nelson is reliant on its own utility for its power supply. There was a sense of local empowerment that came from having a local utility provider which had the ability to become involved in community level projects and provide renewable energy generation near-by without the need for long distance transmission and a displaced labour force.

The stakeholders felt it was very important to maintain that autonomy and continue to support local clean energy projects instead of centralizing generation through new projects such as Site C.

Regional transportation between Trail, Nelson, and Castlegar was identified as an area which had great potential for improvement. The diffuse population in the corridor is heavily dependant on personal vehicles and has a high proportion of commuters travelling between the three communities on a daily basis. Session participants were extremely supportive of local van pools and for re-introducing a passenger rail service on the existing infrastructure to help promote sustainable transportation and re-assign funding priorities away from the current initiatives that are expanding highway capacity.

Attrition was also a big concern for residents in this area in terms of having a skilled work force to capture some of the emerging opportunities in the green economy. With more than 10 percent of the region's labour force expected to retire over the next five to ten years, increasing attraction and retention of skilled workers is considered paramount. A need to promote the technology strengths in the region, coupled with evolving sustainable industry practices was flagged as a critical tool to building new business clusters.



While local industry members are active to some degree in terms of advancing green initiatives (e.g. Teck Resources with its e-waste recycling and the mill in Celgar that uses co-generation), a general lack of understanding for the need of pursuing low-carbon lifestyles and initiatives by local residents and some areas of industry was identified as the largest barrier for the region moving forward in the green economy. The lack of adequate education on water use, sustainable resource consumption, and renewable energy technologies is inhibiting the pursuit of these opportunities in the region. There was recognition among participants that all levels of the education system are currently insufficient in this regard and that there needs to be a greater emphasis put on conservation and on the adoption of sustainable technologies in order to build the demand for businesses who provide goods and services to the green economy in the region.

The key stakeholders in this session were extremely motivated to help their region transition to the widespread adoption of a low-carbon lifestyle, while growing local economic opportunities. However, they were deeply concerned for a lack of general public understanding of their concerns.

### **Key Messages from the Kootenay Focus Group**

- Local communities and regions should be allowed to explore options for local utility ownership for distributed power production and supply. Local ownership provides more incentives for community involvement in renewable energy supply than does the current, highly-centralized energy distribution system. This is one way that all levels of government can support each other, and provide local municipalities with the tools and funding to embrace sustainable development choices.
- Lifecycle costing and externalities should be incorporated into all local government purchasing decisions for green products and services. In this manner, local suppliers will have more opportunities to become part of the supply chain in this province.
- There is a great need to strengthen the environmental regulatory process as it relates to major industrial activity in the region and to increase the enforcement of those rules. At present, lax enforcement and unclear regulatory regimes serve as a deterrent to investments in cleaner or more energy efficient technologies. In this regard, pollution charges (e.g. fuel and carbon tax revenues, etc.) could be used to directly fund more sustainable alternatives such as public transportation systems and renewable energy projects. This would help reduce the upfront costs of renewable energy systems and energy efficiency retrofits.
- Building codes need to be more proactive and more flexible at the regional level, especially in relation to: Water management (gray-water re-use, rainwater reticulation, and septic requirements); Thermal efficiency; and Renewable energy implementation (i.e. CSA requirements/permitting).
- Environmental values, sustainable lifestyle education, and green career opportunities should be mandatory elements of the K-12 curriculum.

## Cariboo

### Location: Prince George

During the two focus groups conducted in Prince George, a sense of independence from the southern regions of the province was illustrated, due in part to the region's growing access to new export-oriented infrastructure. Focus group participants even identified an Export Logistics Specialist as a potential emerging career opportunity.

However, this sense of independence was also accompanied by a feeling of isolation. While the stakeholders acknowledged that they were a great distance from most government policy makers, they felt that they were not being adequately represented or acknowledged for their contribution to the economy and the income their region provides to the rest of the province through the export of its natural resources. Many felt that policies which were created in Vancouver and Victoria did not adequately address the concerns of those residents and industries in this region. There was a strong desire among the northern representatives to gain more regionally-focused policies and programs that address the specific concerns and issues present in the region.

The importance of locally-based education and training was identified as crucial for the stability of the region and for the growth of low-carbon opportunities in their economy. The importance of training a local labour force was highlighted as a necessity to minimize population fluctuations during the traditional "boom and bust" cycles associated with a resource-based economy. Students who are educated in the north tend to stay in the region, but at present, many students end up leaving the region and not returning. As a result, workers are imported from the Lower Mainland when there is a need for skilled labour which creates inefficiencies in the labour market and represents lost opportunities for local residents.

Many industry stakeholders felt that the funding system for post-secondary education in the province left communities in the north especially vulnerable to economic fluctuations. As commodity prices fall, so

does the funding for education and training as a result of lower enrolment levels. These cut backs then result in lower education choices and program offerings within a region which in turn becomes a barrier to attracting new residents. While the population base in a resource community is prone to fluctuations, the need for stable, long-term funding in the education system is necessary to help attract and retain the region's important younger demographic and to help build capacity ahead of demand. It was also strongly recommended that sustainability and emerging environmental technologies become a mandatory part of the K-12 curriculum to ensure adequate understanding of the urgency for societal changes and to highlight some of the new employment opportunities which exist in the green economy.

The region has been dependant on forestry for a great deal of time, and has been operating in a manner which has now proved vulnerable to unpredictable business cycles. As the market for pulp and paper and lumber has declined, the region has identified economic opportunities in district heating and wood pellets and noted that the region has the potential of becoming the "Saudi Arabia of the bioenergy world". As the bioenergy industry has grown, land tenure and access to feedstock has emerged as a barrier to growth for building both domestic and export markets. Many participants identified the need for provincial policies to help lower extraction costs and ensure long-term access to biomass as a prerequisite to attracting the necessary capital to build the industry. There has also been concern that there is not adequate support for the development of clean energy and bioenergy facilities in the area, which present enormous opportunities for energy self-sufficiency in the region.



### **Key Messages from the Cariboo Focus Groups**

- Land tenure issues and access to adequate supplies of biomass feedstock are key issues in this region. Several dimensions of this issue were explored, including the need for policies that would allow for building viable local and regional markets, as a basis for creating more export opportunities.
- In this regard, it was suggested that BC Hydro might create policies and programs that would allow for more local energy supply and distribution infrastructure that would enable local power generation using biofuels. Such a framework could enable more regional autonomy, and should address issues related to land tenure and allowable annual cuts for biomass supply.
- A very real need was seen for increased funding for all education programs in the region in order to retain skilled workers in the region; to build labour force capacity ahead of demand; and to advance the local green economy. Present deficiencies in this regard favour recruiting workers from outside the region.
- A better understanding of the role that forests play in carbon sequestration was seen as one way for BC to capitalize on the emerging global carbon offset market while retaining the great natural forests that are so vital to the economy of the region.

## **Northeast**

### **Location: Dawson Creek**

The Northeast region has become a hub for energy extraction, processing, and the related training. While the oil and gas sector has been growing rapidly, so too have the renewable energy options which have been identified as long-term, sustainable alternatives to fossil fuels. With the province's first commercial wind farm having a visible presence on top of Bear Mountain near Dawson Creek, the region has acknowledged the expansive opportunities which renewable energy technologies can play in economic and green job growth in the region.

Northern Lights College in Dawson Creek has embraced the promising opportunities and has developed a portfolio of programs to train skilled workers for the employment opportunities in the clean energy sector.

While several large wind and hydro energy projects are slated for construction in the region, a need for continued policy development was identified that would promote the growth of other renewable energy technologies such as solar thermal, geothermal, and bioenergy. With many small remote and/or First Nations communities in the area currently dependant on diesel generators as their primary source of electricity, the opportunities for introducing clean energy technologies are not only abundant, but present employment and economic opportunities locally. It was acknowledged that renewable energy production tends to be in-line with the values of BC's First Nations' communities.



The stakeholders in attendance at this focus group session identified that local educational institutions have a critical role to play in the emergence of a green economy. It was highlighted that the K-12 system in the province is currently failing to build sufficient awareness of renewable energy options and the employment opportunities which accompany the green economy. Representatives in the group also identified the need for increased support for colleges in the province. There was a desire to see more provincial funding to assist local institutions with applied research, demonstration, and education/training projects related to green technologies, and for supporting regional Centres of Excellence which would help facilitate a province-wide growth of workers skilled for employment in the emerging green economy.

### **Key Messages from the Northeast Focus Group**

- The Peace Country is home to some of the best solar and wind resources in Canada, but there is a need for more upfront incentives to help these industries gain a foothold and to realize the renewable energy potential that exists.
- Recognizing the realities of fossil fuel abundance in the north, it was proposed that policies be developed that used revenues from fossil fuels to directly subsidize and encourage the use of solar hot water and PV technologies, as well as wind energy projects.
- Other measures were suggested, such as having utilities pay for the upfront capital costs of distributed renewable energy technology installations for residential and commercial buildings. This was seen as one way to encourage local manufacturing and resource use for clean energy projects which could be deployed throughout the province (e.g. wind towers made from BC timber).
- It was suggested that more funding should be made available for applied research at local community colleges, such as is being done in Ontario, as a means to help develop regional Centres of Excellence for applied research and to train work-ready employees for the green economy. Huge opportunities were seen for local colleges to become test centers and proving grounds for new clean technologies.
- Promoting small scale, de-centralized clean energy projects would enable local companies to participate in calls for clean power. Current size requirements exclude smaller northern companies from participating. There is also a need for increased partnerships between smaller firms in order to overcome some of these challenges.



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