

Competitive Transition Analysis Group

FINAL REPORT

January 26, 2010



Executive Summary

The Competitive Transition Analysis Group (CTAG), a joint committee of the Nova Scotia Federation of Agriculture (NSFA) and the Nova Scotia Department of Agriculture (NSDA), was mandated by the Deputy Minister of Agriculture to recommend how current and future NSDA programs and services should be aligned to support the Competitive Transition Framework, a framework focused on three economic principles: i) transitional support, ii) strategic public investment and iii) public goods and services.

Through an extensive consultation process with stakeholders, major theme areas related to competitiveness were identified. There was consensus within the industry that to achieve competitiveness, industry needed enhanced and/or more effective assistance in accessing existing government programs and services. Stakeholders were also united in the emphasis placed on the need for a stronger business climate and culture within the agriculture sector, both in terms of the acquisition of business skills within the industry, and in terms of ensuring that organizational structure and regulations support business growth within government. In addition, stakeholders stressed the need for improved cooperation within the agriculture industry, and improved communications and cooperation within NSDA and between NSDA and other government departments/agencies and NGOs.

Other common needs of industry stakeholders focused on regional extension services, research and innovation, public goods and services, transitional developmental support programs, critical processing infrastructure, and the development of highly qualified personnel to serve and work in the industry.

As a result of the industry needs assessment and examination of the current programs and services offered through NSDA and other government departments and agencies, 20 recommendations were identified to strengthen the three economic principles of the Competitive Transition Framework. In strengthening the three principles through these recommendations, both industry and government will move closer toward the collectively-supported vision of an agricultural sector that is self-sufficient, independent, sustainable, has appropriate intervention by government, allowing market signals to drive businesses.

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Overview of the Nova Scotia Agricultural Industry

The Agri-Food Industry in Nova Scotia accounted for an estimated 2.1 percent of the total provincial Gross Domestic Product (GDP) in 2008¹. The economic contribution of agriculture alone does not fully or adequately describe the importance of this industry to Nova Scotia. Agriculture is an integral part of the fabric of rural Nova Scotia. In addition to being an important contributor to local economies, the agricultural production sector, through local spending on goods and services, supports other rural-based businesses, such as farm equipment dealerships and financial institutions, feed, fuel and building supply centres, etc. Agriculture also provides employment opportunities to rural residents who often may not have as many choices as urban residents. Agriculture supports tourism and a host of other environmental and social benefits. Agriculture provides ecological goods and services through the creation of wildlife habitat, land stewardship, soil conservation, watershed management and many other activities. Farmers make contributions to rural communities through the provision of leadership to community groups, volunteerism, and the organization of social events such as dances, suppers, etc. It can be argued and concluded that the value and contribution of agriculture crosses the rural-urban divide and impacts the lives of all Nova Scotians.

Nova Scotia's agriculture industry is characterized by many small diverse farms. The 2006 Statistics Canada census reported 3795 farms in Nova Scotia with an average farm size of 262 acres². Fruit farming, beef cattle farming, and nursery/tree production accounted for 23%, 19% and 11% of farms, respectively, in 2006². Almost 70% of farms reported farm cash receipts less than \$50,000. Farms generating farm cash receipts of over \$500,000 annually account for fewer than 7% of Nova Scotia farms³.

Farm cash receipts in Nova Scotia amounted to \$474 million in 2007⁴. Nova Scotia's supply managed sectors (dairy, poultry and eggs) together accounted for close to half of all production in the province⁴. Some industries have shown growth in recent years, such as the fur industry which accounted for \$64 million of the total farm cash receipts⁵. Other industries have experienced decline, such as the hog sector. The value of this industry decreased from over \$31 million in 2004 to under \$9 million in 2008⁴. Fruit production accounted for almost 10% of total farm cash receipts in 2008, with wild blueberry, apple and strawberry contributing over \$26 million⁶, \$12 million⁷ and \$3 million⁸, respectively. A variety of vegetables, grains, nursery, and maple products, and livestock contribute to Nova Scotia's diverse and changing agricultural landscape.

Total farm cash receipts have increased 6.7% in Nova Scotia between 1971 and 2006, however this number alone can be misleading as it does not provide an indication of liabilities, expenses, and net income⁹. During this same 35 year period, total net farm income decreased by an average of 91% and it is now hovering around zero where income no longer covers expenses. While there may be differences in the net farm income between the supply-managed and non-supply managed sectors, total farm debt has increased in both sectors. Debt increased 146% in Nova Scotia between 1971 and 2006¹. While some farmers in Nova Scotia are prospering, many farmers within both groups have expressed that it is a struggle to be profitable¹⁰.

Competitive Transition Background and Process

In September 2006, the Nova Scotia Federation of Agriculture (NSFA) and the Nova Scotia Department of Agriculture (NSDA) appointed a joint-working group to examine ways to increase the competitiveness of the province's agriculture sector. The impetus for the formation of this working group was the 'Kelco Report'. The Kelco Report not only articulated the need for the Nova Scotia agriculture industry to transition to a more competitive, sustainable sector, it concluded that "Nova Scotia farmers are unable to capture sufficient market returns and recommended a model and program to assist the agriculture industry to enhance its competitive edge by transferring monies from those who benefit from the industry, namely Nova Scotians, to the farm gate through a levy, thereby providing farmers with the returns they need to reinvest in their businesses".

The working group's efforts resulted in the development of a Competitive Transition Framework outlining a direction, guiding principles, and three economic principles (pillars) for a competitive, profitable and sustainable agriculture sector in Nova Scotia. This framework was endorsed by the NSFA at their 2008 Annual General Meeting.

The Competitive Transition Framework sets out a direction for an agricultural sector that is self-sufficient, independent and sustainable with appropriate intervention from government, allowing market signals to drive businesses. The three pillars are: transitional support; strategic public investment; and public goods and services.

Transitional support includes programs and services that support the movement of any individual, business or sector in the primary or secondary agricultural industry toward a more competitive position, or to support maintenance of their competitive advantage; any change in business based on profitability and competitiveness. Transitional support will help individuals, businesses and sectors be viable. This pillar recognizes that to be competitive, some in the industry must undergo a transition to develop business opportunities that are more competitive.

The Strategic Public Investment pillar recognizes that to be competitive and sustainable, public investments must be made in human, capital and other resources that, in large, serve to benefit the industry as a whole rather than individual businesses. Examples of such strategic investments would include the development of strategic policy, strong partnerships in business and rural development, research and innovation capacity, and investment in strengthening the sector's human capital.

The Public Goods and Services pillar recognizes that in the pursuit of public benefits, costs may be imposed on a business or the public may value certain benefits that impose costs on farmers (e.g., food safety, animal welfare, environmental stewardship, etc). This recognizes the need to compensate those 'targeted' costs/benefits, foster opportunity cost recovery or purchase desired public benefits. Public goods and services includes and goes beyond the concept of ecological goods and services.

The framework articulates industry and government's commitment to working together, with defined roles, to ensure Nova Scotia's agriculture industry is competitive.

In spring 2009, the Deputy Minister of Agriculture announced a Competitive Transition Analysis Group (CTAG) made up of representatives from the federation and the department. The mandate of this group was to:

- review, identify and categorize programs and services within NSDA and other departments and agencies;
- assess needs and identify gaps in programs and services; and
- articulate recommendations for the alignment of current and future NSDA programs and services to support competitive transition.

A comprehensive list of programs and services offered by NSDA and other government departments and agencies was prepared. To assist in the identification of programs and services offered by external departments and agencies in support of agriculture, a full-day workshop was held and selected departments and agencies were invited to share with each other programs and services offered by their respective organizations in support of competitive transition. The workshop began with a presentation on the Competitive Transition Initiative, outlining the overall objectives and progress to date, and was followed by presentations from invited guests highlighting programs offered through their organizations to support the agriculture industry. The day concluded with an open discussion on ways organizations could work together to stimulate the province's agricultural economy.

To assess industry needs, CTAG consulted with industry stakeholders during the summer/fall 2009. Overall, 17 meetings were held with agricultural producers and processors in communities across Nova Scotia, from Sydney to Church Point. Additional consultation sessions were held with NSDA staff, the Nova Scotia Institute of Agrologists, AgraPoint, Young Farmers, and faculty, staff and students of the Nova Scotia Agricultural College. Almost 300 stakeholders participated in the 23 meetings that were held. Each consultation session began with a presentation that outlined the vision for competitive transition, defined the three pillars and described CTAG's mandate and deliverables. Following the presentations, participants worked in groups to identify, discuss and record their views on the barriers that need to be removed to allow competitiveness in the agriculture/agri-food sector, the resources that are needed by the agriculture/agri-food sector to compete in the market and the greatest opportunities in agriculture, agri-food and agri-based products over the next five to ten years. Stakeholder feedback was coded and clustered into theme areas. An analysis of each theme served to identify industry needs.

Following the needs analysis, the programs and services offered by NSDA and external departments and agencies were assessed for their alignment with the objectives of competitive transition and the three pillars. Next, the ability of these current programs and services to meet identified industry needs was evaluated. Gaps in programming were readily apparent through this process.

In generating the final recommendations for the alignment of current and future programming with the pillars of competitive transition, CTAG considered broad industry needs, the effectiveness of current programming and services in achieving their desired goals and objectives, and gaps in programming. In addition, a balanced approach was used to ensure that resources would be distributed among the three pillars. Such an approach was necessitated by the recognition that all three economic principles are essential to achieving the vision.

Industry Views on Transition to Competitiveness

CTAG's consultation with industry stakeholders revealed a strong desire within the agriculture/agri-food industry to identify challenges, reflect on current practices and models, cooperate in solving problems, and explore new opportunities. While the success stories of some farms and agri-businesses were cause for celebration, other more devastating personal business experiences reinforced the need for the Competitive Transition Framework. The broad spectrum of comments ranged from the lack of processing infrastructure to support existing and emerging business endeavours, to the effectiveness of programs and services offered by NSDA. Participants highlighted the difficulty in sourcing information, programs and expertise to solve problems and the need for improved cooperation and communication both within and among the government and industry. Overall, stakeholders expressed a strong need for accessible training in business and marketing skills and improved extension services.

It is not the intent of this report to include every comment and need expressed by stakeholders but rather to present the main themes arising from the consultation process. There was widespread agreement within themes, barriers, resources and growth opportunities. These are the areas government and industry must address together in order to build a competitive industry.

Attitude and Cooperation within the Industry

Maintaining a positive attitude is an important factor in business success. It is motivating, leads to productivity and is crucial in portraying a positive image of the industry to customers, clients and citizens. Stakeholders felt that in many parts of the industry this positive energy has been missing for some time. If the industry is to progress and prosper, it must dispel the attitude of defeat and concentrate on its positive attributes and opportunities.

Those opportunities may not lay in traditional commodity-based agriculture. In late 2009, few would argue that the hog industry, once one of Nova Scotia's strongest economic contributors, will rebound from its present downward spiral. But despite drastic declines in some industry sectors, there are opportunities for growth. It is in these new opportunities that there is hope. The growing demand for local produce is gaining momentum and with it, the opportunity to build an appreciation for the value inherent in local agriculture. That appreciation can lead to higher margins for business operations

who are willing to move up the value chain and capture more of the value for themselves.

Change begins with a recognition of a problem and can only come about with a desire to do something different. With respect to conventional marketing patterns in small scale agriculture, doing something different requires a change in how business is done. If farmers are to capture more value, they will have to assume more responsibility in managing their value chain. Present systems that rely on commodity brokers to collect, store, distribute and market food products cannot yield more value for the farmer. He/she must take ownership of that value chain and manage it from production to market to realize full value. Many have already moved in this direction with direct marketing, community-supported agriculture and reduced input production practices. Moving up this value chain requires the acquisition of new skills. An attitude that embraces continued learning and change is required.

Needs:

- Support of initiatives to strengthen the business mind-set within the industry and to increase understanding and management of business risk.
- Support of cooperative industry-led initiatives that serve to increase the competitiveness of the industry.
- More cooperation between groups of farmers with similar business interests (direct retail for example) in moving up the value chain to capture higher margins for all.

Making real and significant change in this industry will only come by addressing the willingness to change as business conditions change. Industry participants expressed a desire for additional skill development in the area of business management. Business management principles dealing with adjusting production output or addressing in-put cost or pricing challenges according to market signals, is often a foreign concept to agricultural producers. To be competitive, farms must be managed as businesses, businesses that are competing for margins. The need for assistance with business management is recognized and discussed in a later section on human capital.

This competitive, margin driven attitude is something that the agriculture industry can learn from almost any other sector. Restaurants constantly strive to differentiate themselves and successful ones even regularly re-invent themselves in an effort to remain fresh and exciting for their customers. Within agriculture, ornamental greenhouse operators must constantly introduce new plants or new arrangements and displays of plant products in order to keep their clients enthusiastic about supporting their piece of the industry. This often means not concentrating on product at all, but on giving arrangement ideas to clients or providing clients with assistance in carrying plants to their car. These all add value to the shopping experience and they keep customers coming back without regard to the price of the plants because of the value obtained from the human interaction.

In addition to the identification of the need for hope and enthusiasm in the industry and the need for a change in the business attitude of primary producers, the need for a more cooperative approach throughout the industry and government was also deemed critical to the transition to a more competitive state. Stakeholders recognized the need for agri-food entrepreneurs to cooperate more with one another at an individual, community and commodity level. This cooperation can take the form of cooperative ownership of specialized equipment; partnering with like-sector business owners to store and distribute products; and cooperative strategies in marketing, such as employing market agents to represent groups of farmers in direct market situations where they exist. Such cooperative initiatives have the potential to reduce both capital and operating costs for farm businesses.

Cooperation may also be the key to gaining shelf space with major retail stores. With only a few major retailers throughout the Atlantic provinces, marketing challenges appear in the form of the scale of production that producers can offer Atlantic chains. Only a few producers can reach the scale of production that major retailers require. For others, new business models built on cooperation will be needed to build sufficient scale and range of product offerings to deal effectively through the major retailers.

While some farmers are realizing success as primary producers and wish to continue in production agriculture alone, many farmers see opportunities in moving up the value chain to market directly to customers. However, many of these latter farmers lack the scale of production, packing and handling, transportation and customer service interface to be competitive. By cooperating or coordinating these activities, groups of farm managers may achieve greater efficiencies and realize higher margins than they currently do as individuals. This cooperative approach has been employed successfully in many regions of the province to purchase and maintain and even operate specialized equipment. Local groups of farmers have purchased combines, sprayers, lime spreaders and land levelers. The same cooperative spirit has been applied to vegetable production, load consolidation, delivery and customer service functions in some areas. In other areas, community feed kitchens and processing facilities have been built using cooperative business models. While there are good examples to draw from, the majority of farm operators remain proudly independent. While the virtues of independence are many, independence can lead to duplication of investments in under-utilized assets. Furthermore, it can lead to reliance on wholesale chain load consolidation and service sectors to move products to retail. The result is the lowest margin pricing scheme at the farm level, commodity pricing.

To compete more effectively, many smaller producers must begin to cooperate with each other to coordinate critical activities. This may require formal business arrangements to manage investments and systems. While farmers may not *want* to do this, they may have no other choice. The maximum value will be realized when producers capitalize on the opportunities to get fresh product into local markets with as little handling margin as possible.

Communication and Coordination within Government

The industry consistently stated that there is a disconnect between farmers and NSDA. Many farmers do not understand NSDA's role or who to contact for assistance or information. They are overwhelmed by the complexity of programs and feel that over the past several years they have lost connection with practical advisors at the local or regional level. With the restructuring of branches and staff turnover within the department, staff roles and branch services are not clear to industry. They do not understand what the department does or who they should turn to for advice. Farmers feel that communications between the department and the industry has waned. The electronic media cannot replace the personal connections farmers want with the people who can help them solve problems or navigate their way through what is seen to be an increasingly complex set of assistance programs and services.

NSDA staff also expressed frustration over not knowing what other divisions or branches of the department are doing; not being aware of programs and services offered in other branches. Without this basic sharing of information within NSDA, it is impossible for primary contact and regional staff to provide effective service to the industry.

One of the most often cited frustrations was a perceived lack of communication and coordination at the inter-departmental level. Numerous examples were cited where a lack of dialogue or cooperation among government departments and agencies had led to inefficiencies, duplication, and barriers to advancing agri-business opportunities. Farmers often cited examples of contradictions in policies that protect the environment and policies that promote businesses based on natural resources. Stakeholders recommend that NSDA work more cooperatively with all levels of government, regional development agencies, industry and the private sector. The best approach to a competitive future is through collaboration, where the sharing of information, combining of expertise and inclusion of diversity ensures greater efficiencies and innovative approaches to problem solving.

Needs:

- A coordinated approach to communications between NSDA and industry.
- More effective communication within NSDA.
- Greater communication and collaboration among all levels of government departments and agencies and between government and private sector.
- Government departments must work harder to communicate their policy objectives and delivery approaches.

Financing our Growth

The industry expressed frustration over current margins in the agri-food sector. Low margins and restricted operating credit have left a significant cash flow burden on most operations. Besides the obvious challenges of meeting business operating requirements, a lack of operating capital restricts the ability of farm businesses to access developmental funding available through government programs. For instance, the Farm Investment

Fund, the Agri-Food Industry Development Fund and the Innovation Fund all require a cash contribution from the applicant. With tight margins, many farms in need of the development funding offered through these programs do not have the required available cash to enable them to participate.

A significant degree of frustration was expressed over how lenders appear to be withdrawing from the sector. Many noted that it appears commercial banks are becoming more risk averse and are actively shedding agricultural accounts. At the same time, the Nova Scotia Farm Loan Board (NSFLB), a provincial Crown corporation, is perceived as acting like any other lender, with rigid and bureaucratic processes or criteria attached to its funding choices and decisions. There is an expectation in the industry that the NSFLB will operate differently, and through its services, show strong support for the agriculture sector.

Need:

- NS Farm Loan Board (NSFLB) policies should be reviewed and examined in the context of the role the Board should play in financing growth opportunities for agriculture. With commercial banks and the Farm Credit Corporation active in farm financing, the NSFLB has the opportunity to define its niche.

Financing is a problem for both the supply-managed and non-supply managed sectors. The high degree of capital investment required to establish or buy into a supply management business is prohibitive, particularly for young entrepreneurs. Many non-supply managed commodities are lower margin and cannot attract financing based on their business case. While industry expressed the need for lending institutions that are willing to assume a higher degree of risk, many producers felt strongly that continued investment in farms that do not have or follow competitive and sustainable business plans should stop. Such investment does not serve the greater industry.

Financing is also critical to the development of new opportunities. Buy-local initiatives and the concern over food miles create support for Nova Scotia produced crops. Growers will need to move up the value chain, into load consolidation, cold storage, distribution and retail service. Financing for cooperative storage facilities, distribution systems and marketing is needed. The emergence of a market for green energy, particularly energy produced from quickly renewable biomass, presents a significant opportunity for a new agricultural production base. These are all areas where new lending paradigms may be required to facilitate development. In some cases, government agencies with this mandate are already in place. In others, there is an opportunity for the NSFLB to play a key role in underwriting these business opportunities.

Removing Government Barriers to Business

The agriculture industry was united in their view that government regulations and

bureaucracy were impeding business growth and restricting the development of new opportunities. Although government is responsible for establishing inter-provincial trade barriers, it is not viewed as acting quickly to amend trade agreements to facilitate the movement of goods among provinces. For example, the existence of both federal and provincial food safety inspection standards was seen as a barrier to market access; the need for both systems was questioned. Likewise, the existence of separate provincial standards in each of the Atlantic provinces was viewed as a barrier to regional markets. The industry calls on the government of Nova Scotia to facilitate trade among provinces.

Needs:

- Action to facilitate trade within the region.
- A review of methodologies that could facilitate compensation to farmers for increasing costs associated with providing public services (environmental services).
- Regular reviews of government policies to ensure they are not restricting the expansion of current businesses or the development of new opportunities.
- An innovative and entrepreneurial focused Department of Agriculture.
- Greater connection and understanding between NSDA staff and the agriculture industry.

Regulations designed to protect the environment and the health and safety of food systems are most often cited as imposing costs on agricultural production that cannot be recovered from the market place. Although many in the industry recognize the value and need for such regulations, the questions of ‘who will pay’ and ‘how can these costs be recovered’ were asked repeatedly. Some sectors expressed the need for government to work with industry in the establishment of these regulations or to provide industry with time to propose self-regulations.

In addition to restricting market access and imposing cost increases on producers, policies are seen as impeding the development of new opportunities. Agriculture producers see opportunities in biomass, biogas and farm-based wind energy. However, reasonable access to the grid must be facilitated by government. For example, many farmers expressed interest in the development of green energy but are discouraged from pursuing opportunities in this area because of the net metering policy currently in place with Nova Scotia Power. Industry indicates it needs a feed in tariff policy that will encourage sales of electricity to the grid.

Others across the industry have found government regulations to be impediments to the expansion of existing industries or the development of niche products and new market opportunities. Blueberry and maple producers cite difficulties in the expansion of their industries due to difficulties in accessing Crown land. Other industries identify restrictive regulations and regulatory processes of marketing boards for the barriers they create.

In supply managed commodities like chicken and dairy, the regulations controlling

production were created in an era where commodity level production was the preferred model to follow. Today's emphasis on local and input-reduced production opens new doors for smaller scale, higher value niche production systems like free range, organic, input-reduced or value-enhanced systems. These are not adequately accommodated by current provincial regulations, leaving these opportunities and shelf spaces to be filled by products from outside the region.

Another common sentiment across industry was that government regulations need to demonstrate strong support for agriculture. Industry asks government to protect supply managed sectors through the regulatory environment. The fur sector sees a role for government in monitoring regulatory compliance with environmental standards to support the growth of their industry. Across the province, industry saw a role for government in taking a lead on agricultural land-use issues. In addition, industry feels it is incumbent upon government to value locally-produced foods and to demonstrate this through the establishment of a local food procurement policy for government institutions.

Government bureaucracy, in addition to government regulations, was viewed as a barrier to business growth in the agriculture sector. Industry stakeholders view the NSDA as an organization that is outdated, bureaucratic, insular and out of touch with the agriculture industry. The industry calls on NSDA to review its mandate, question its relevance, and examine new operational models. The organizational structure must facilitate policy development and timely responses to issues as they arise. Government must enable the development of new opportunities and effectively network and collaborate with other government departments at all levels to promote agri-food opportunities. NSDA staff need to become more innovative and creative in their approach to engaging the industry. NSDA staff need to be on- farm and in the communities and associations where agriculture happens. An innovative government is viewed as a critical partner in the industry's transition.

Transitional Support Programs and Services

The most recognizable transitional support programs offered by NSDA are the Farm Investment Fund (FIF) and the Agri-Food Industry Development Fund. While the farm community spoke positively about transitional support funding and cited many examples of the positive difference it had made on-farm, these programs are generally perceived as being too complicated, rigid, and confusing. The choice of options and categories is overwhelming to some, yet at the same time, many farmers felt program categories did not accommodate individual needs and plans. As program categories have been added to FIF, farm operators have become confused by the priorities and the intended outcomes of the support. The complexity of application guidelines and forms along with the various levels of federal and provincial funding support available add to the confusion. Farm operators do not see the value in the application process and view the inability to change their application after it has been submitted as being too rigid.

The focus on annual applications to FIF for monetary assistance has led many farmers to prioritize the completion and submission of the application forms (i.e. to secure funding support before the program closes) over the concept of planning for business

development. Thinking of business development annually, only at the time of FIF application completion will not promote strategic long-term business planning focused on what is needed to achieve competitiveness. Alternate models of program delivery need to be explored.

The recent move toward cross-compliance, whereby an Environmental Farm Plan (EFP) is required to access FIF raises questions about the intent of these programs. If the EFP is required to access FIF funding, should government ensure that producers are implementing recommendations as outlined in their EFP action plans? The long-term effects of cross-compliance requirements need to be explored.

Needs:

- Government programs that are user-friendly, flexible and able to accommodate individual transition needs.
- Review of cross-compliance requirements of programs.
- Increased communication of government programs and services available to the agriculture industry in support of competitive transition.
- Provision of navigational support to industry regarding the accessing of programs and services.
- Improved (easier to follow) program guidelines and assistance in accessing programs.

Many creative ideas for new programming were generated by stakeholders, such as new funding for green energy initiatives, funding to support individual business plans, programs to encourage agricultural land to stay in production and programs that encourage citizen's to purchase locally grown food (e.g. rebates based on local receipts). While the programming ideas were many, there was consensus regarding the need for government programs to reflect the vision and policy objectives of competitive transition.

It was evident from the consultation sessions that many in the industry were unaware of the vast array of government programs and services available through NSDA and other government departments and agencies to support industry transition and competitiveness. Thus, a real need exists for improved communications to increase industry's awareness of available programs and services, and for navigational and pathfinding support to help stakeholders identify available programs and services aimed at increasing their competitiveness.

Advancement through Human Capital Development

The development of human capital is critical for businesses to gain competitive advantage. The aging population in Nova Scotia is reflected in the demographic profile of the agriculture industry. The average age of farmers is near 55. Developing and maintaining human capital will be a major challenge in the future. In all sectors, farmers spoke of the increasing difficulty in attracting labour for farm operations at the wage rates primary agriculture is able to offer.

Building our agricultural and rural work force and increasing its overall skill set are common themes in the discussion of human capital. As Nova Scotia's population ages and the birth rate declines, the agriculture industry faces greater challenges in attracting a skilled workforce. One suggestion often mentioned to address the pending labour shortage is to invest more in attracting immigrants to Nova Scotia. Many stakeholders suggested that the department actively work with the Office of Immigration to recruit immigrants as a means of rejuvenating the agricultural sector.

Another suggestion that commonly arose in consultation sessions was to be more proactive in seeking out and encouraging new entrants (e.g. international and domestic agripreneurs) to the sector. Industry recognizes that profitability in the sector is needed to attract new entrants. Additional support in terms of financial incentives was considered a critical step. Many stakeholders felt that the interest forgiveness form of incentive currently offered through the NSFLB is not enough. One solution offered to encourage new entrants through succession was that the NSFLB entertain perpetual mortgages or leases on its hard assets. Such a loan would attach to the farm's assets and have an extremely long amortization period (40 - 50 years). The intent would be that it could be transferred without penalty or revision to the next generation.

Industry expressed the need for more extension support, information and resources for new entrants. Many stakeholders felt that apprenticeship or mentorship opportunities, that allowed new entrants to benefit from the knowledge of experienced farmers or agri-

Needs:

- Attraction of new entrants to Nova Scotia's agriculture/agri-food industry.
- Collaboration between NSDA and the Office of Immigration on an active recruitment strategy for attracting immigrants to the agriculture/agri-food industry.
- Apprenticeship and mentorship programs/opportunities for new entrants.
- Co-op or apprenticeship programs in agriculture at post-secondary institutions.
- Mechanism to transfer knowledge and skills between generations.
- Additional formal and informal training opportunities as well as extension support in the areas of business management, risk management, human resource management, marketing and customer service skill.

businesses, would help new entrants succeed. Others felt that small farm development or new and emerging opportunity discovery programs could encourage new people to enter the industry.

Farmers were concerned about the loss of skills between generations. The inherent knowledge of the majority of today's farmers who are in their 50's is regarded as not only valuable and essential to new entrants to the industry, but also as not being accessible through other means (e.g. formal educational programs). In this light, many stakeholders also spoke positively about the role apprenticeship and mentoring programs could play in teaching young farmers how to "do the farming activities". One suggestion was for a registry, an organized system, to match people who want to farm with people who have expressed their desire to sell their farm business.

In addition to a shortage of labourers or new agripreneurs, the industry faces challenges in terms of attracting people with the right set of skills. In some sectors, specific skills are needed and training opportunities will be required to help develop these skills. For example, wild blueberry operators need people who have heavy equipment operating skills because the production of wild blueberries has become more mechanized (e.g. mechanical harvesters). Husbandry skills specific to bee keeping were also pinpointed. Other skills identified related to operation of GPS or precision farming and mapping activities. These modern communication and geographic location devices are becoming prevalent in many aspects of field production. GPS guided systems are now available on new installation planters, sprayers, fertilizer spreaders and harvesters to assist in accurately applying inputs or recording production and harvesting statistics. Industry encourages the NSAC and other post-secondary institutions to develop formal co-op or apprenticeship programs that provide students with an opportunity to acquire hands-on skills.

Customer service skills were identified as a need of current and new business owners and employees. New opportunities such as direct marketing ventures, agri-tourism, and culinary tourism require businesses to provide excellent customer service. Many farmers concurred that the customer service skills required to compete in these new endeavours are not well understood. Training and education will be required as producers attempt to become sales staff and tourism marketers.

The high importance placed on business management skills was evident throughout the industry. Industry feels that it is skilled at making production related decisions but is lacking in its middle management and investment management capabilities. Overall, the level of business acumen exhibited by the sector needs to be upgraded. Business skills like financial management, planning and opportunity assessment, human resource management, risk management, as well as marketing and sales were frequently mentioned as areas requiring additional emphasis and investment within the department. Opportunities for acquiring these skills both through formal programs and informal training methods are needed.

Within the business skills identified, marketing skills were highlighted. This arose often during discussions about local marketing and the discomfort many farmers experience in

talking to customers and trying to sell their product. Marketing is a skill that most farmers have not invested in. Many farmers who were involved in the direct marketing of product said that it required them to interact more with customers and that marketing assistance would aid them in this endeavour.

Education Through Extension and Promotion

All stakeholder groups recognized the importance of and stressed the need for continuing education in the form of extension for farmers, as well as promotional efforts aimed at educating consumers and the general public.

There was a consistent and common concern over the level of extension support across the province. It was evident that there is a lack of understanding of the current extension services model with regard to services available and the cost of these services. While some sectors expressed a desire for technical extension specialists, others expressed the need for a greater presence of general extension workers. Farmers are looking for extension services in a wide variety of areas such as production/technical advice, business planning, financial management, marketing, human resource management, adaptation of new technologies and research, etc. In addition, industry requested support to navigate their way through the complex web of government assistance programs. Overwhelmingly, there was agreement that extension services should be expanded within the province.

Additional extension efforts in marketing were requested from all regions of the province. Current NSDA marketing staff efforts were recognized as important to developing export opportunities for some key crops (e.g. wild blueberry), however, industry felt that the greatest growth opportunities lie in displacing imports in favour of Nova Scotia products on store shelves. Industry producers expressed a need to have NSDA marketing staff place more effort on local and regional marketing efforts, as well as extension activities to assist farmers with acquiring the necessary skills for direct marketing.

Farmers are looking for educational materials and fact sheets, mentorship, and assistance in solving problems. While there was recognition of the high quality of research being

Needs:

- Improve extension services to support the industry as it moves forward.
- Increase the presence of extension within the industry.
- Improve communications regarding available extension services.
- Emphasize the provision of business management skills (e.g. business, human resource, financial and risk management) and marketing training in extension efforts.
- Ensure research results are communicated and transferred to industry in a meaningful way.
- Increase agriculture educational efforts in schools and to the general public.
- Increase promotional efforts to raise awareness of local products and the value and contribution of agriculture to the citizens of Nova Scotia.

conducted in many areas at the Nova Scotia Agricultural College, there was dismay expressed with the fact that much of this research was not transferred to industry in a meaningful way. Industry stressed the need for extension staff to bridge the gap between researchers and farmers.

Education through extension to farmers was not the only theme related to education. All stakeholder sessions strongly expressed the need for educating the public on agricultural production practices, the value of locally grown food, farming as a respected business profession, and the environmental and social contributions of agriculture. Farmers feel that the public is unaware of the challenges and hardships they face and the benefits that they provide to society. It was recognized that current agricultural awareness activities and Select Nova Scotia efforts are valuable and should be continued but that more needs to be done. Educational efforts need to reach into public schools and beyond. Promotional efforts must sell the positive attributes of agriculture. Echoed in one sector and stakeholder group after another was the need for additional promotional activities aimed at increasing the awareness of locally grown products.

Information Needed to Boost Competitiveness

Throughout the agriculture industry, access to information was viewed as critically important to improving competitiveness and adding value to farm and agri-businesses. The need for marketing, economic and production information was stressed. Farm operators expressed a desire for more information to enable them to benchmark their business performance against their competitors (e.g. cost of production, etc.). Data, such as per unit sales and expenses, per unit production and management assessments and investment performance broken down to the enterprise level, is key

Needs:

- Research on consumer trends, market intelligence and cost of production.
- Building an understanding of the food distribution value chain in the industry.
- Regulations in support of increased disclosure of product information.
- Further information on the concept of public goods and services and the Competitive Transition Framework.

to assessing business performance and competitiveness. This information needs to be collected, standardly assessed and assimilated, and openly shared so that best of class or commodity data sets are available for managers who are looking to invest in new enterprises. This data is vital to assessing investment decisions, management changes and new enterprise developments. Without provincial or regional data, the Nova Scotia agriculture industry must base decisions on data gathered from other regions (Quebec, Ontario, US) and regions that have different climatic, economic and social conditions. The relevancy of the data from different regions is questionable.

Farmers also suggested that the industry would benefit from becoming more aware of the workings of the food distribution value chain. Building an understanding of margin

setting within the food value chain may facilitate relationships within the chain. Farmers at the beginning of the chain often don't see the overhead and margin requirements of those who add to the chain. Distribution, storage, wholesale and retail activities all add values and margins to the basic food product. In addition to relationship building, an increased understanding of the mechanics of the value chain may assist farmers in moving up the chain to capture more of the value. There are many examples of farm operators who are capturing additional value by building and operating their own retail outlets or marketing direct to consumers. Community supported agriculture is an example of a new and emerging trend that offers direct access to customers and higher margins for farmers.

A high priority within industry is access to consumer trends and marketing information. Nova Scotia farm and agri-businesses want to know what products and services consumers want so they can meet demand or fill a niche. Access to consumer trend information is necessary for Nova Scotia farmers and agri-businesses to adopt a broader perspective, which is essential for business planning purposes. Consumer and market information is also needed by industry to identify regional, provincial, national and international opportunities. Farmers agreed that they did not know enough about the market place and that such information would be invaluable to transitioning toward competitiveness.

Farmers also call upon government to increase and disclose more information on food product labels. Due to globalization, Nova Scotia products compete on grocery store shelves with products from around the world. While imported products may be cheaper, farmers feel consumers may alter their decision if they had further information on how products were grown, packaged, and transported. Imported products may be produced in countries without the same level of regard, standards or regulations for food safety or environmental stewardship. For example, chemical or organic inputs that would not be acceptable in Canada may be used in other countries. Likewise greenhouse gas emissions from the transport of imported food may exceed those of locally produced food. Disclosure of additional information about the products that appear on our food shelves, may affect consumer preferences. In addition, Nova Scotia producers feel disadvantaged by the lack of disclosure or control over information relating to how competitive crops were produced. An understanding of the competition may assist Nova Scotia producers in becoming more competitive.

Finally, the industry expressed its desire to have more information on the economic principles expressed in the Competitive Transition Framework. While the concept of transitional support in the form of funding programs was well understood, the concept of Public Goods and Services (PGS) was not well understood. All stakeholders questioned the definition of PGS and the process for finding out what the public values. More complicated questions arose around how PGS values could be established and what systems might be used to compensate farmers for the provision of PGS. A lot of work has already been done at the national working group level, as well as at the provincial level in the form of pilot projects to test various theories of ecological goods and services but a great deal more needs to be done to explore the theory and mechanics of PGS and to educate the general public on these concepts.

Building the Foundation of Success

All stakeholders referred to the need for strategic investment in built capital. Built capital typically is described according to the requirements of a particular sector. From a rural economic development point of view, processing infrastructure is critical to realizing the full value of Nova Scotia's agri-food industries. The jobs and investments associated with agri-food processing is a significant driver, and often the only driver, of real economic opportunities in rural areas. As processing infrastructure declines within Nova Scotia, jobs within the province also decline. Often the closure of processing facilities leads to the disappearance of the primary agri-food product.

The livestock sector consistently expressed the need for more capacity in abattoirs and processing facilities. Regional (e.g. closer to the farm) abattoirs and facilities to deal with waste products like SRMs were the most commonly expressed infrastructure need. The need for facilities was expressed by producers of sheep, chicken, free range chicken, beef and mink. This is not just a comment on the number of abattoirs servicing the industry, but also on the regulatory classification and, in some cases, the scale of these operations. In addition to infrastructure, the licence or permit that enables access to markets is associated with the facility. Only products that have been processed or handled by a federally-inspected facility can move across provincial borders. This restriction is a barrier for fresh and processed products trying to access regional retail distribution channels. For example, producers cannot sell to Loblaws or Sobeys without federal inspection since both operate distribution systems that serve the entire Atlantic region and cannot segregate product just for Nova Scotia stores.

Needs:

- Additional support for abattoirs, livestock processing and other processing facilities.
- Development of storage facilities and a transportation system for collective load consolidation and delivery to markets.
- Increased infrastructure support for the development of new and emerging opportunities.

In some instances, facilities that serve local areas are also needed. While there is great potential to develop a locally branded red meat industry in Cape Breton and eastern Nova Scotia, there are no abattoirs or SRM handling facilities in these regions. As with all discussions about food processing, scale of production is a consideration. Small inefficient plants will not be competitive in commodity markets. Those markets will be dominated by large scale industries. With neither a production base nor a processing base to build on, Nova Scotia must either build its production capacity or look to niche or specialty markets within the region. The latter opportunity requires facilities, but does not require federally-inspected facilities to serve a local market.

Marketing infrastructure needs vary by commodity and by business model. Processing and fresh packing lines are needed in the horticulture sector. Improved access to commercial kitchens to test new products or ideas are needed to drive value-added

opportunities. Local load consolidation, cold storage and distribution systems are needed in some regions to facilitate cooperative marketing and service efforts. These may be driven by segregated production and marketing models, like organic or input-reduced agriculture to target niche markets in a variety of commodities. This was evident from producers of many commodities, including fruits, vegetables, dairy and chicken.

There is a lack of cold storage, load consolidation and transportation distribution infrastructure in key parts of the province. Food hubs or distribution centers have the potential to enhance local agriculture opportunities by combining loads, collectively storing produce and coordinating delivery to markets.

As well as infrastructure to support existing endeavours, the need for infrastructure to support the development and capturing of new opportunities was recognized. Investment in greenhouse technologies and facilities that allows operators to increase the length of the growing season and thereby capture an additional share of the market is one example. Energy-related infrastructure like biogas digesters, pellet manufacturing and biodiesel processing could open up new opportunities for agriculture by facilitating the development of a business around renewable energy.

Natural Capital's Connection to Economic Competitiveness

The agriculture industry stressed not only the importance of enhancing and protecting Nova Scotia's natural capital for future generations but also the importance of their contribution in this regard. The concept of using the province's air, water, land and soil resources in a sustainable manner has great resonance with the industry. The Environment Farm Plan (EFP) Program and Nutrient Management Program are viewed as positive initiatives that should continue. Some sectors questioned if monitoring of EFP's would be the next positive step forward; others felt the EFP Program should remain as an educational tool. Despite the EFP debate, there was agreement that agriculture, government and/or industry, needs to define what its standards are and then needs to deal swiftly and concisely with operators who step outside these accepted standards.

Needs:

- Exploration of a system(s) that recognizes, values and provides compensation for public goods and services.
- Cooperative initiatives to solve land-use planning problems and conflicts.
- Educational efforts aimed at increasing the public's understanding of agricultural practices and their relationship to food production.
- Support to develop new opportunities arising from the natural competitive advantages that Nova Scotia offers.

The contributions that agriculture makes to enhancing air, water and soil health are not fully understood, appreciated or valued by the public. This is in large part due to the private ownership of agricultural land. With less than 15% of the land in Nova Scotia owned by the Crown, farmers are seen as the primary beneficiaries of good land

stewardship. While this is true, the benefits extend far beyond the farm gate, particularly where water and air enhancement are concerned. The opportunities to develop systems, programs or policies that recognize, value and provide compensation for these services to the public need to be explored.

Issues concerning the use of or access to land are emotionally charged. Urban encroachment into rural areas is an increasing issue, placing enhanced scrutiny on agricultural operations. Urban encroachment may raise the public's concerns over noise, visual impacts due to farming practices and agricultural air emissions, including odour. Individuals who live among farms are increasingly demanding the right to enjoy their property without these nuisances. In Kings County, the municipality is struggling under pressures created by trying to accommodate urban development in close proximity to agricultural land. While the agricultural community understands the general relationships between agricultural activities and food production, in many cases, more specific and targeted education, information and technologies are needed by newcomers to rural areas to address the increasing complexity of these agricultural issues.

The increase in public concern over agricultural inputs to land and crops (e.g. fertilizer, pesticides, etc.) adds to the weight of the public's call for restrictions on farm or food production activities. A potential opportunity for the agriculture sector is that of using non-agricultural wastes (e.g. biosolids) in production management strategies. The natural degradation that occurs in active and healthy ecosystems can handle many forms of organic waste, which society has indicated it wants diverted from landfills. If these non-agricultural waste are viewed as a 'problem to society', could the agriculture industry not capitalize on their use by solving a disposal problem for the public? To pursue this potential opportunity, industry believes public values need to change to accept the usage of biowaste in non-food production and/or food production. Industry felt additional research, promotion and education would be needed, not only to convince the public of the acceptability of this new practice, but also to convince citizen's that agriculture's role in solving a societal waste problem has economic value from which farmers can benefit.

There was consensus throughout the industry that the government must protect agricultural land to secure Nova Scotia's food supply for the future. Farmers suggested that the government use incentive programs to keep agricultural land in production. At the same time, farmers recognized that individual land owners deserved the right to have access to capital in retirement and that selling the farm for development might be the only option to financial security during retirement. Recognizing this, the industry calls for assistance to make farming profitable so that farm land has value to a new generation of agripreneurs.

Nova Scotia's natural capital creates a unique landscape for farmers to capture competitive advantage opportunities. The province's naturally acid soils tend to provide an advantage for crops that grow well in acid conditions, like blueberries. Some sectors expressed enthusiasm over utilization of Nova Scotia's extensive pasture land for opportunities, such as grass-fed livestock and biomass green energy production. The opportunity to utilize non-agricultural wastes into the production of green energy was

recognized by many. Others see Nova Scotia's small and/or coastal farms as venues for public education and as scenic backdrops that encourage tourism. In all these opportunities the common requirement is that proprietors focus on opportunities to generate additional margins in areas where they see some geographic, climatic, or social marketing advantage.

Leading the Way with Research and Innovation

Nova Scotia has invested heavily in developing its agriculture/agri-food research capacity through the Nova Scotia Agricultural College (NSAC). Nova Scotia can proudly boast that NSAC is the most research intensive university in Atlantic Canada. The industry has been a full and active participant in many of NSAC's research programs and projects, investing significant time, energy and money in specific research endeavors.

While a few sectors expressed great pride in the research capacity devoted to their sectors, the majority expressed the need for more applied, industry-driven research and regional research initiatives. The value of cultivar and management trials was highlighted across the industry. The need for additional resources for innovation and commercialization was also expressed.

A number of stakeholders expressed the need for a centralized capacity to offer businesses research and development, technology transfer, commercialization and business management expertise and services. Although the capacity may exist across government departments and at different levels of government, a coordinated guided approach would advance the pace of innovation.

The need for research to explore new opportunities to remove some of the risk associated with new ventures was requested. For example, the development of composting technology to render mink manure and carcasses into a resource product was cited as a need within the fur industry. The value of economic research and analysis to the exploration of all new and emerging opportunities and fields was also highlighted as an essential component of all research projects.

The industry generally supported the need for research and demonstration activities as

Needs:

- Additional support for industry-driven research and regional research, including management trials, as well as innovation and commercialization activities.
- The development of incentives or mechanisms to increase the communication of research results to the agriculture industry.
- Additional emphasis on technology transfer of research results to industry.
- Coordinated, guided, central capacity to assist businesses with research and development needs from initial concepts through to commercialization and beyond.
- Inclusion of new and emerging opportunities into funding priorities.

well as the Industry Research Chair program, but questioned the results of such activities to date. Communication of research results to industry stakeholders was identified as a major weakness. While the majority of industry stakeholders value the research done in Nova Scotia, very few could articulate any benefits it had yielded. Industry needs adaptive and applied research presented in a format that they can easily understand. The need for extension to fill the gap that exists in transferring research results and adopting technology to industry was identified. The industry is hopeful that the inclusion of AgraPoint within the NSAC will facilitate the communication and adoption of research results within the industry.

Existing Programs and Services to Address Industry Needs

A broad array of programs and services exist, both within NSDA and other government departments and services, to support the transition of the agriculture/agri-food industry. An extensive listing of NSDA programs and services is included in Appendix A, and those programs and services offered by other departments and agencies are listed in Appendix B. These lists describe the department under which the program is offered and the principles of the competitive transition framework that it supports. Communication of and pathfinding/navigation assistance to these programs and services is imperative for competitiveness within the industry to be achieved.

The text that follows highlights some of the programs and services currently in place to address the industry needs as outlined under each of the theme areas and described in the previous chapter of this report.

Attitude and Cooperation within the Industry

Department legislation, such as the *Natural Products Marketing Act*, and programs like the Strategic Infrastructure Investment Fund and Supporting the Innovation Capacity of Farmers promote industry cooperation and advance common economic interests. Other provincial programs, including the Department of Economic and Rural Development's Community Economic Development Funds, promote cooperation as well. In addition, Agriculture and Agri-Food Canada provides funding to help industry-led agriculture organizations pull together national scientific and technical resources to establish Canadian agri-science clusters.

Communication and Coordination within Government

NSDA has various formal and informal linkages with other departments. For example, the province's environmental health strategy is a cooperative effort between the departments of agriculture, health promotion and protection, and environment. NSDA has had input in the development of government-wide strategies for climate change and water management, and the implementation of the *Environmental Goals and Sustainable Prosperity Act*.

A good example of the communication of programs within NSDA is the annual Farm Investment Fund 'roadshow' conducted by the Programs and Business Risk Management division of Agriculture Services. Staff of this division travel to numerous locations across the province in the spring to promote this on-farm development program to farmers.

Financing our Growth

There are various financing options available to producers. For example, the Department of Agriculture offers a number of services from loans to production insurance, development grants and market and product development assistance. Other government

departments and agencies offering offer some form of financing or development assistance include the Department of Economic and Rural Development, Nova Scotia Business Inc. (NSBI), the Business Development Bank of Canada (BDBC), Farm Credit Canada(FCC), and the commercial banks and credit unions.

Targeted funding is also available to help certain groups, including immigrants, women and youth, start or expand business operations. Examples include the Department of Economic and Rural Development's Immigrant Small Business Loans Program, Atlantic Canada Opportunities Agency's (ACOA) women in business initiative and their young entrepreneur development program, and the Farm Loan Board's new entrants to agriculture program.

Removing Government Barriers to Business

The Government of Nova Scotia's Better Regulation Initiative aims to maintain the benefits of regulation while decreasing the costs of doing business for Nova Scotians. This initiative encourages government staff to consider ways other than regulation to encourage desired behavior. The department of Agriculture reguallry meets with its federal and provincial counterparts to discuss and review wassy to improve the Agreement on Inter-provincial Trade (AIT).

Transitional Support Programs and Services

Many NSDA programs and services aim to support competitive transition. These include the Farm Investment Fund and Agri-Food Industry Development fund that support sustainable growth in the agriculture and agri-food industry respectively; and Innovation Fund programming that aims to advance the pace of innovation and capture new opportunities. It also includes the marketing, business development and product development services provided by the Industry Development and Business Services Branch of the Department.

Transitional support programs exist outside NSDA as well. The NS Department of Economic and Rural Development has an online tool for Nova Scotians considering starting their own business. This business idea explorer includes start-up basics, market information and helpful advice on different kinds of businesses, small business information and useful links. Information is tailored specifically for beekeeping, greenhouse operations, maple syrup, cranberry production, herb farming and nursery products. In addition, Access Nova Scotia provides a range of services to help businesses meet their needs, including information on planning, starting and operating a business in Nova Scotia. The Access Nova Scotia online BizPaL tool allows users to create a customized list of the permits and licences needed from all levels of government for operating a business.

Tools that are available to assist the industry include Service Canada's online navigational link (<http://www.canadabusiness.ca/eng/search/sof/>) that allows users to access information on all federal government grants that fit specified criteria, and Agriculture and Agri-Food Canada's online navigational link

(<http://www4.agr.gc.ca/AAFC-AAC/display-afficher.do?id=1204639676853&lang=eng>) that helps users access federal and provincial programs and services.

Advancement through Human Capital Development

A number of current initiatives serve to attract new entrants to the agriculture and agri-food industry in Nova Scotia. The Nova Scotia Office of Immigration promotes immigration to the province; NSDA promotes investment in Nova Scotia agriculture from outside the province through immigration; the Department of Economic and Rural Development's Immigrant Small Business Loans Program helps establish new businesses, grow existing businesses and empower entrepreneurs with the support they need to create employment for themselves and others. In addition, the Nova Scotia Farm Loan Board provides a loan interest rebate to encourage new farmers to enter the industry. Furthermore, industry transition is supported by the recently formed NSDA New Entrants committee. The New Entrants committee is in the process of having a needs assessment conducted through Growing Forward funding, which will result in recommended actions including initiatives, programs and services to improve NSDA's service to new entrants and to aid in the attraction and retention of new entrants to the agriculture and agri-food industry in Nova Scotia.

The advancement of human capital through skill development is supported by universities and colleges across the province, region and beyond. Formal agricultural programming (e.g. post-graduate degrees) and/or skills training (e.g. continuing and distance education courses) are available through NSAC, Nova Scotia Community College, and universities. A number of university research centres focus on business development as well, including the Centre for Women in Business (MSVU), the St. F.X. Enterprise Development Centre, and the Acadia Centre for Social and Business Entrepreneurship. ACOA's young entrepreneur development program offers financial support to non-profit organizations for business skills training for entrepreneurs under the age of 35.

Funding is available through various organizations to help build entrepreneurial skills. For example, NSDA provides funding through the Agri-Food Industry Development Fund and the Farm Investment Fund to help build business management capacity in agriculture. Funding is also available through the Department of Economic and Rural Development's Business Development Program to help business operators review and assess their practices and develop new approaches and success. Assistance is available to help operators build skills in training and recruitment, market research and business planning, advertising and promotions, visual merchandising techniques and fiscal management. ACOA also offers a variety of tools, including the young entrepreneur development program to support business skills training, and an online resource with guidance for business and marketing plans and other information.

A variety of organizations offer assistance and training for export opportunities. ACOA offers a number of programs designed to help small and medium-sized enterprises acquire the export skills, knowledge and advice needed to successfully carry out export ventures. NSBI also offers a number of programs to improve the export capacity of Nova

Scotia businesses, including the ExportAbility Program, the GAP Go-Ahead Program, and the Export Prospector Program. In addition, Canada Business maintains an online tool (<http://www.canadabusiness.ca/eng/88/>) to help users understand market research and statistical applications for business.

Education Through Extension and Promotion

Education through agricultural extension is provided across the province through various means, including the NSDA, NSAC and AgraPoint. Department services include agricultural resource coordinators, transition officers, veterinarians, and staff focusing on environmental farm planning, energy conservation and food safety. Through AgraPoint, a team of experts provide production technology and consulting services to agribusinesses and associations on matters regarding livestock, horticulture and field crops, and integrated pest management.

Education and promotion initiatives to the general public include NSDA's agriculture awareness and agriculture in the classroom programs. These programs are designed to educate the general public and students about agriculture in Nova Scotia. In addition, NSDA encourages consumers to buy Nova Scotia grown products through programs like Select Nova Scotia and funding for farmers' markets. The government-wide sustainable procurement policy currently under development encourages government departments to purchase Nova Scotia grown products.

Outside NSDA, non-government organizations such as the Ecology Action Centre (EAC), promote buying local. The EAC and the Nova Scotia Federation of Agriculture are working on a project highlighting the importance of individual food choices.

Information Needed to Boost Competitiveness

One of the key roles in extension education is providing information to assist learners in achieving their goals. The NSDA provides a wide range of information services related to market trends, program funding program information and regulations affecting agricultural business. Specific technical production information is delivered primarily through Agra-Point International.

Numerous agencies provide information on consumer trends, market intelligence and cost of production. Statistical information and research is made available to stakeholders on a regular basis through Nova Scotia's provincial finance department, which produces Nova Scotia business statistics, labour market and manufacturing information and other key economic indicators. In addition, Statistics Canada publishes a comprehensive review of Canada's agriculture industry every five years, including data on major economic, demographic, and other farm trends. Statistics Canada also publishes statistical information on a periodic basis on a range of topics.

Information can also be obtained from Agriculture and Agri-Food Canada's free online financial tool that allows producers to compare their financial information with that of their peers and competitors; the Canadian Rural Information Service which provides

information for rural businesses on rural subjects such as community development, funding sources and opportunities for rural youth; and NSBI which offers half-day information sessions that provide information on a country or regions' business environment and insights into its market opportunities.

Building the Foundation of Success

A few sources of funding exist to support the development of infrastructure, processing and storage facilities. NSDA's Strategic Infrastructure Investment Fund is designed to improve agricultural infrastructure and help producers seize market share, improve competitiveness, add value, foster new partnerships and attract investment. NSBI offers business financing that could be used to purchase land or buildings, or to help renovate existing buildings.

Natural Capital's Connection to Economic Competitiveness

A number of initiatives are underway that help protect the province's natural capital for future generations of farmers. NSDA and NSFA collaborate to offer the Environmental Farm Plan. The Environmental Farm Plan (EFP) is a voluntary program that helps farmers identify and assess environmental risk on their property. It allows farmers to incorporate environmental considerations into their everyday business decisions, rather than addressing environmental issues in a reactive sense. Farmers work with the EFP Program Coordinator to develop a confidential environmental farm plan for their operation. The process includes an initial farm visit and an on-farm environmental review to identify and assess environmental risks. A final report and recommendations, including an action plan, is generated.

NSDA's Farm Investment Fund includes a comprehensive set of incentives (Beneficial Management Practices) to assist farmers to mitigate on-farm environmental risk. The program provides an opportunity to address actions that result from their individual Environmental Farm Plan.

NSDA staff participate on the provincial Land Use Working Group, with members from Service Nova Scotia, Natural Resources, Environment, and AgraPoint. This committee is working to develop a rational tool for local decision makers, as well as department employees to utilize to help solve land use planning problems and issues. To date, a draft document has been created with the expectation of a final draft prepared by spring 2010. This group provides a supporting role to the new Agricultural Land Review Committee that was announced in November 2009. The Agricultural Land Review Committee will seek public input around the management and long-term future of the province's agricultural lands, and will determine if adequate protection for agricultural lands already exist or whether additional steps need to be taken to further protect land.

Leading the Way with Research and Innovation

NSAC is the centre for agricultural research in Atlantic Canada, and in recent years has

positioned itself to play a lead role in the development of Atlantic Canada's bio-economy. The Atlantic BioVenture Centre at NSAC focuses on the development and commercialization of value-added products including food and feed supplements, nutraceuticals and functional foods.

NSDA's industry research chairs program allows industry to partner with NSDA in the creation of a research chair located at NSAC. The research chair focuses on research priorities and issues for the industry sponsor over a five-year term. Past research chairs have been funded in the areas of wild blueberry, processing carrot, potato, fur, poultry and tree-fruit industries, among others.

A variety of federal, provincial and not-for-profit organizations provide funding through a host of programs in support of the operational costs of research along the research and development continuum. NSDA provides research funding for agricultural environmental, production and product innovation research as well as water management initiatives through the Technology Development 2000 program; supports the adaptation of new technologies to primary agriculture through the Supporting the Innovation Capacity of Farmers program; and supports the advancement and commercialization of new opportunities for the agriculture and agri-food sector through the Innovation and Commercialization of New Opportunities for Agri-Based Product fund.

At the federal level, the Natural Sciences and Engineering Research Council of Canada, Social Sciences and Humanities Research Council of Canada and Agriculture and Agri-Food Canada have many programs that provide funding assistance for research and commercialization. For example, Agriculture and Agri-Food Canada's Agri-Opportunities Program provides funds to accelerate the commercialization of new agricultural products, processes and services.

A variety of other programs support the development of new and emerging opportunities, such as green energy production, including the ecoNova Scotia Environmental Technology Program (through the Department of Environment) and the ecoAgriculture Biofuels Capacity Initiative (through Agriculture Canada). ACOA, through their Atlantic Innovation Fund, makes strategic investments in projects aimed at increasing Atlantic Canada's innovation capacity.

Competitive Transition Analysis Group

RECOMMENDATIONS

In generating recommendations for alignment of current and future programming with the pillars of competitive transition as directed in its terms of reference, CTAG considered broad industry needs, and the current programming and services offered both within the NSDA and available through other agencies. In addition, CTAG's approach focused on balancing resources among the three pillars. Generally, most of the resources, programs and services required to achieve competitiveness are already in place. A greater effort in communication and dissemination of information is needed to increase the effectiveness of these resources.

Transitional Support

Extension

- Build an effective and equitable extension model across the province. This requires an examination of the level of services currently being delivered.
- Provide industry and staff with both formal and informal business and marketing skill training, in the areas of business, financial management, human resource management, marketing, and understanding and capturing value-chain opportunities.

Facilitating Business

- Direct resources toward a central pathfinding/navigation service that will link producers to experts, programs, services and funding.
- Coordinate efforts to reduce regulatory barriers and streamline development of agri-business opportunities.
- Enhance investment in local market opportunities and support procurement policies that encourage local food consumption.
- Reduce barriers to trade inter-provincially to facilitate market access in the region.
- Review and examine the role of the Nova Scotia Farm Loan Board in financing growth opportunities for agriculture; in particular within the context of the Board defining its niche in relation to commercial banks and the Farm Credit Corporation.

Developmental Programs

- Support programs must be simpler to understand and access. Support must be

provided to guide applicants through the process.

- Evaluate the effectiveness of cross-compliance program requirements with attention to objectives and resulting outcomes.

Strategic Public Investment

Infrastructure

- Facilitate investment in processing infrastructure where business case indicates markets and value-chains currently exist or are demonstrated to have potential.
- Facilitate the development infrastructure to enable direct marketing systems including storage capacity, transportation and distribution systems, and direct marketing venues.

Human Capital

- Support participation of all employees in activities and events that build their agricultural knowledge and relationships with Nova Scotia's producers and agri-businesses (e.g. farm tours, farm site visits, etc.).
- Appoint a working group to identify production skills needed in growth areas of the industry and develop a strategy to address these needs. The working group should include representatives from NSDA, NSFA, NS Labour and Workforce Development, NS Department of Education and Office of Immigration.
- Improve communication between and among its branches and divisions, and with other government departments and NGOs.
- Collaborate with the Office of Immigration and NS Department of Economic and Rural Development to promote agricultural opportunities and agriculture as a career, and to attract immigrants to the agriculture/agri-food industry in Nova Scotia.

Innovation

- Develop a research and innovation policy which encourages the industry's involvement in the development of research proposals, and facilitates the communication of results to all stakeholders.
- Direct additional support for research into emerging opportunities for value-chain development, adaptation of new technologies, and commercialization of agri-based innovations.
- Establish an innovation and commercialization center for agriculture which can

attract a critical mass of innovators and valued added prospectors to the agriculture sector.

Public Goods and Services

- Define what the public values and agriculture's role in delivering goods and services to address public values.
- Develop partnerships with the industry to facilitate new economic opportunities related to agriculture's capacity to address climate change (e.g. development of carbon-trading and green energy models based on agriculture systems).

Appendix A
Catalogue of Nova Scotia Department of Agriculture Programs and Services

TS: Transitional Support
SPI: Strategic Public Investment
PGS: Public Goods and Services

Name	Description	Web Address	TS	SPI	PGS
<i>PROGRAMS</i>					
Strategic Infrastructure Investment Fund (SIIF)	The objectives of the Strategic Infrastructure Investment Fund are to: i) Enhance, develop, and diversify agricultural infrastructure; ii) Accelerate industry growth and development through access to new markets and a larger market share; iii) Improve competitiveness; iv) Increase value-added and market driven initiatives; v) Enhance industry partnerships and collaboration; and vi) Attract and retain investment within agriculture and agri-food industries. Eligible applicants include primary producers, processors, agri-businesses, industry associations, industry groups, agricultural cooperatives, and corporations. Eligible projects are those of sufficient scope and scale to accelerate economic growth and development. Preference will be given to projects demonstrating partnerships at the industry and value-chain level, supported by a strong business plan and strategic research/analysis. Projects which leverage funding from alternate funding sources will be given preference.	http://www.gov.ns.ca/agri/prm/programs/afidf.shtml	X	X	

Name	Description	Web Address	TS	SPI	PGS
Supporting the Innovation Capacity of Farmers	<p>This initiative will provide funds to farmers or groups of farmers to support investments in the development or adaptation of technical innovations in primary agriculture, which contribute to on-farm profitability and competitiveness. Innovations could be developed by farmers or groups of farmers, or could be sourced from domestic or international science or technology developers and adapted to the Canadian context. Eligible technical innovations will be new, not generally available, or not widely adopted in a given region or sector. Only one project supporting a proposed technical innovation in each sector will be funded in a given region. Under this initiative, emphasis will be placed on smaller-scale projects not funded through existing programming. Projects will be supported by an assessment that identifies its potential benefits for on-farm profitability and competitiveness as well as benefits for the industry and/or community. This program will include management trials. Critical to the effectiveness of this program will be the dissemination of knowledge gained through these projects.</p>	http://www.gov.ns.ca/agri/prm/programs/Innovation.shtml	X		
New Entrants to Agriculture Program - Farm Loan Board	<p>The objective of this Program is to encourage new Nova Scotian farmers to purchase and develop successful farm operations. Funds available under this program will be extended to improve the viability of each farm operation as key areas requiring improvement are outlined by the New Entrant in a business plan.</p>	http://www.gov.ns.ca/agri/farmlb/info/		X	

Name	Description	Web Address	TS	SPI	PGS
Innovation and Commercialization of New Opportunities for Agri-Based Products	<p>The goal of this program is to increase the competitiveness and profitability of the Nova Scotia agriculture, agri-food and agri-based products sector through supporting the innovation and commercialization of new opportunities. The specific objectives are to: i) Accelerate the pace of innovation; ii) Increase the ability throughout industry to identify and develop new market opportunities; iii) Enhance industry’s ability to anticipate and capture opportunities; iv) Advance the commercialization of agri-based technologies; and v) Enhance linkages for those in the sector to acquire the expertise and assistance needed to capture new opportunities. This program supports unique, emerging opportunities that are timely and have a strong potential for innovation and/or commercialization that will be of substantial benefit to Nova Scotia’s agriculture, agri-food or agri-products based sector. This program provides support to projects demonstrating readiness to advance a technology that is approaching market readiness as well as for pre-research activities to investigate and develop potential new innovations, markets and business opportunities.</p>	http://www.gov.ns.ca/agri/prm/programs/newopps.shtml	X	X	

Name	Description	Web Address	TS	SPI	PGS
Technology Development	The Technology Development 2000 program supports the development and adaptation of new and leading agricultural technologies and knowledge that will enhance the competitive position of Nova Scotia's agriculture and agri-food industry. The objectives are to i) Support technological research opportunities identified by the agriculture and agri-food industry; ii) Increase industry awareness of the value of research; iii) Encourage the participation of industry in the support of research, iv) Develop research expertise in Atlantic Canada; and v) Optimize the relationship among research, education and industry, vi) Communicate research results and encourage industry adaptation of technology, and vii) Identify solutions to short and long term water and soil management issues. This program includes funding for research projects (2-year) and industry research chairs (5-year).	http://www.gov.ns.ca/agri/prm/programs/IF_CatA.pdf	X	X	
Business Development and Market Enhancement through Agri-Food Industry Development Fund (AFIDF) for agri-businesses and the Farm Investment Fund (FIF) for farmers	To enable the agriculture sector to become proactive in business development resulting in improved business management, knowledge and skills thus increasing the adoption of best management practices. This initiative will provide funding to assist in building the business management capacity within the business. Projects funded should assist business managers in improving management practices, identifying and developing new markets and opportunities and effectively managing risks and resources.	AFIDF: http://www.gov.ns.ca/agri/prm/programs/afidf.shtml ; FIF: http://www.gov.ns.ca/agri/prm/programs/fifguide.shtml	X		

Name	Description	Web Address	TS	SPI	PGS
Land Protection and Development -under AFIDF	Contributes to improving the management of land and water resources. Financial assistance is targeted to ensuring quality water and availability of adequate land area of suitable quality for the maintenance and growth of the farm's land production base.	http://www.gov.ns.ca/agri/prm/programs/fifguide.shtml	X		X
Nova Scotia Orchard and Vineyard Transition Program 2007-2011	The objective of the Orchard and Vineyard Transition Program (OVTP) is to assist producers in the removal of less desirable fruit trees or grapevines to aid in adaptation to industry pressures and changing markets.	http://www.gov.ns.ca/agri/prm/programs/ovtp.shtml	X		
New Entrants Initiative under Growing Forward	A committee has been established within the Department of Agriculture to develop and implement a strategy to attract and support new entrants to Nova Scotia's agriculture industry. This initiative includes assessing what is needed to attract new entrants. Programming will also target audiences outside the traditional agricultural sectors.		X	X	
Direct Marketing Community Development Trust Fund	Supports direct marketing initiatives and provides opportunities for enhanced competitiveness through innovation, diversification and collaboration.	http://www.gov.ns.ca/agri/prm/programs/afidf.shtml#F		X	
Traceability under AFIDE and FIF + Pilot Projects	Assists in the purchase and installation of traceability infrastructure and staff training to implement traceability systems for plants, animals and products.	AFIDE: http://www.gov.ns.ca/agri/prm/programs/afidf.shtml ; FIF: http://www.gov.ns.ca/agri/prm/prog		X	X

Name	Description	Web Address	TS	SPI	PGS
Specified Risk Materials (SRM) Handling Preparedness under AFIDF	Provides an economically sustainable waste management strategy for slaughterhouse operators and other livestock commodities.	http://www.gov.ns.ca/agri/prm/programs/afidf.shtml		X	X
Regulatory Compliance: Food Safety and Occupational health and Safety under AFIDF and FIF	Assists farmers (FIF) and agri-businesses (AFIDF) with direct costs of addressing food and safety compliance issues.	http://www.gov.ns.ca/agri/prm/programs/afidf.shtml			X
Food Safety and Quality Initiative: Provincially Inspected Slaughter Facilities and Meat Processing Facilities under AFIDF	This program provides assistance to provincially inspected on-farm and post-farm slaughter facilities and/or meat processing facilities to meet provincial inspection licensing requirements by supporting the implementation of food safety system components.	http://www.gov.ns.ca/agri/prm/programs/afidf.shtml		X	
Agroenvironmental Initiatives under FIF	The focus is on direct costs that farmers incur to address issues, concerns and practices that impact on the preservation of the natural environment (e.g., energy conservation initiatives).	http://www.gov.ns.ca/agri/prm/programs/fifguide.shtml		X	X
Biodiversity Initiatives under FIF	The focus is on assisting producers in developing or improving on-farm wildlife habitats (e.g., farm pond, beaver pond management, wetland restoration).	http://www.gov.ns.ca/agri/prm/programs/fifguide.shtml		X	X

Name	Description	Web Address	TS	SPI	PGS
Graduate Research Training Initiative Scholarship Program	<p>This program provides scholarships to high caliber students who are engaged in a research-based graduate program at the Nova Scotia Agricultural College and who are conducting research that will benefit Nova Scotia's agriculture, agri-food and agri-based products sector. Graduate thesis research projects must address one or more of the three Growing Forward priority outcomes (competitiveness and innovation, society's priorities, managing risks). This initiative will result in a reliable supply of highly qualified personnel to meet the future needs of the sector as well as research outcomes that will address key Growing Forward priorities.</p>	http://nsac.ca/gradstudies/GRTI%20GF%20Guidelines.pdf		X	
Environmental Farm Plan Program	<p>The Environmental Farm Plan (EFP) is a voluntary program that helps farmers identify and assess environmental risk on their property. It allows farmers to incorporate environmental considerations into their everyday business decisions, rather than addressing environmental issues in a reactive sense. Farmers work with the EFP Program Coordinator to develop a confidential environmental farm plan for their operation. The process includes an initial farm visit and an on-farm environmental review to identify and assess environmental risks. A final report and recommendations, including an action plan, is generated. The EFP Program Coordinator will be available for assistance in implementing the action plan. The complete cost of the EFP is covered for farmers under this program.</p>	http://www.nsfa-fa ne.ca/efp			X

Name	Description	Web Address	TS	SPI	PGS
Beneficial Management Practices under FIF	This program is comprised of a comprehensive set of incentives (Beneficial Management Practices) to assist farmers to mitigate on-farm environmental risk. The program provides an opportunity to address actions that result from their individual Environmental Farm Plan.	http://www.gov.ns.ca/agri/prm/programs/fifguide.shtml			X
Energy Conservation Program	The objective of this initiative is to protect the environment and reduce greenhouse gas emissions through research and the adoption of energy conservation and alternate energy systems. A farm energy specialist will help farmers in assessing energy usage (i.e. electricity and heating fuel) on their farm and identify measures that can make their farm more energy efficient. Education, awareness and pilot projects will also be undertaken. Particular emphasis will be placed on the adoption of technologies which reduce energy requirements of the farm, as well as those which utilize waste produced through the production process. To arrange for an energy assessment, farmers can contact the department's farm energy specialist at macdongo@gov.ns.ca .	http://www.gov.ns.ca/agri/growingforward/programming.shtml		X	X
<u>SERVICES</u>					
Food Safety Outreach Initiative under Growing Forward	Nova Scotia's outreach program will involve projects designed to promote the adoption of food safety systems by industry (including non-registered facilities), educate stakeholders on food safety systems, and facilitate the communication and collaboration among the food safety coordinator, primary products food safety inspectors, and food safety specialists (certified public health inspectors) within the department. It will provide tools and information to stakeholders on food safety systems.			X	X

Name	Description	Web Address	TS	SPI	PGS
Biosecurity Implementation Initiative under Growing Forward	An initiative to provide and enhance biosecurity systems and processes to support the early adoption of biosecurity systems. Funding will be used to i) Conduct pilot projects on farm to be used as a model/demonstration of the implementation of industry-developed and government-approved biosecurity systems; ii) Deliver biosecurity awareness seminars, workshops and training to industry; and iii) Disseminate biosecurity kits and signage to individual businesses/producers.			X	X
Nova Scotia Agricultural College and AgraPoint	Research, education and extension. NSAC has been providing high quality education in agriculture and its related disciplines since 1905. Over time, NSAC has evolved into a specialized university that provides a range of technical, undergraduate and graduate programs to meet the changing needs of our stakeholder communities in Atlantic Canada and around the world. As one of the region's leading research institutions, NSAC works in collaboration with industry partners to provide knowledge, innovative solutions and opportunities through both fundamental and applied research. Through AgraPoint, a team of experts provide production technology and consulting services to agribusinesses and associations on matters regarding livestock, horticulture and field crops, and integrated pest management.	nsac.ca		X	
Marketing Services	The Marketing Services Division delivers expert marketing advice and information to clients in the Nova Scotia agri-food industry. Their programs and services are designed to enhance the competitiveness and value of the sector through the identification, development and promotion of domestic and international market opportunities.	http://www.gov.ns.ca/agri/marketing/	X	X	

Name	Description	Web Address	TS	SPI	PGS
Business Development and Economics Division	The Business Development and Economics Division provides professional economical analysis and expert business development support to the Nova Scotia agri-food industry. Their programs are designed to support entrepreneurial development and industry competitiveness.	http://www.gov.ns.ca/agri/bde/	X	X	
Product and Quality Development Division	The Product and Quality Development Division was established in the year 2000 to provide a co-ordinated effort to assist in the expansion of the value-added component of the Nova Scotia Agriculture industry. The overall mission is to promote, encourage and support the development of Nova Scotia's rural areas. The direction and approach of the Division's activities focuses on initiating industry change and providing the leadership necessary to make those changes. Nova Scotia processors can also benefit from unique opportunities for new product development ventures, product diversification and technical support.	http://www.gov.ns.ca/agri/marketing/proddev/	X	X	
Agricultural Resource Coordinators (ARC's)	The Regional Services section of Resource Stewardship consists of five Agricultural Resource Coordinators (ARC's), and five support staff, situated in offices throughout the province. This group represents the primary front-line staff on the agricultural side of the Department. They work closely with agricultural organizations, municipal governments, regional development authorities, non-profit groups, and other government agencies to meet the Department's mandate in the regions.	http://www.gov.ns.ca/agri/contactus/eps/arcs.shtml		X	
Transitional Officers	New positions to work with the farming community toward competitive transition that will be located in various regions in Nova Scotia.			X	

Name	Description	Web Address	TS	SPI	PGS
Agricultural Awareness and 4H	<p>The 4-H and Rural Organizations Section consists of a Provincial Agricultural Awareness and Education Coordinator, a Provincial Senior 4-H Program Coordinator, a Communications and Resource Coordinator, 6 Regional 4-H Specialist positions, and support staff located strategically across the Province. This Section provides youth and volunteer leadership and educational awareness about the Nova Scotia Agricultural Industry. The Section provides leadership and/or resources in support of rural organizations including: the Nova Scotia 4-H Council; the Nova Scotia Agricultural Awareness Committee; the Nova Scotia Farm Health and Safety Committee; the Women’s Institute of Nova Scotia; and the Nova Scotia Young Farmers Forum.</p>	http://www.gov.ns.ca/agri/rs/		X	
Pest Management Services	<p>This section consists of a Chief Inspector, Weed Control Act, a Pest Management, Environment & Regulatory Coordinator, and a Bee Health, Advisor/Inspector. This group adapts and develops regulatory programs and related methods to prevent or minimize introduction and spread of designated diseases and pests of concern to agriculture; delivers enforcement of related regulations; and conducts regular assessments to determine risk invasion of agricultural pests.</p>	http://www.gov.ns.ca/agri/rir/		X	X

Name	Description	Web Address	TS	SPI	PGS
Quality Evaluation Services (e.g., soil, water, manure, etc.)	<p>Quality Evaluation is a division of the Nova Scotia Department of Agriculture that provides the following services i) Analytical Services: the business of providing chemical, microbiological and physical analysis of agricultural materials; ii) Education: the business of providing interpretation of analyses and educational support services for nutrient management, animal health and food product quality and iii) Promotion of Services: the business of encouraging the use of services as management tools for improved production efficiency and quality products for the consumer while generating revenue.</p>	http://www.gov.ns.ca/agri/qe/home.shtml		X	
Veterinary Services	<p>Pathologists provide necropsy service on the various animal species in the province. The veterinary services laboratory also provides services including milk cultures for mastitis, parasitology, Aleutian Disease testing (new entrants), and viral serology tests for poultry. Information generated from the necropsies can provide direction to the client on disease or parasite management and control, mineral profile status of the animal and herd, and potential zoonotic disease information (ie- salmonellosis, coxiella (Q-fever), chlamydia, toxoplasmosis or rabies). Foreign animal disease diagnosis is one of the mandates of the laboratory. Veterinarians with NSDA work to provide i) Leadership in animal welfare and animal management issues; ii) Consultative service to food-animal veterinarians in the private sector, to the livestock industry and to other divisions of the Department; iii) Consultative service to food-animal veterinarians in the private sector and their livestock clientele, to the livestock industry and to other divisions of the Department; vi) Interaction with commodity groups to identify industry needs; etc.</p>			X	X

Name	Description	Web Address	TS	SPI	PGS
Lending Services through the Nova Scotia Farm Loan Board	The Nova Scotia Farm Loan Board is an agricultural development agency serving the needs of agriculture and forestry through the provision of long-term credit at fixed interest rates. The Board provides its lending services to rural Nova Scotia, Canada. By investing in Nova Scotians and creating opportunities within Nova Scotia, the Board helps to build stronger futures for rural Nova Scotians.	http://www.gov.ns.ca/agri/farmlb/	X	X	
Land Protection Services	Land Protection Section has the responsibilities to carry out maintenance work on system of tidal dykes in Nova Scotia. This Section also provides advice to dyke landowners on improving drainage systems on the dykeland.	http://www.gov.ns.ca/agri/rs/marsh/		X	X
Food Safety, Communicable Disease Prevention and Control	To conduct regulatory-based education, inspections, and investigations related to facilities, events, or incidents which are principally for public health protection of Nova Scotians.				X
<i>OTHER</i>					
Dairy and Meat Inspection	Administration of the department's regulatory commitments with respect to dairy and meat inspection for the purposes of public health protection				
Regulated Production and Marketing	Natural Products Marketing Council: To ensure the orderly development of agriculture/agri-food industries.	http://www.gov.ns.ca/agri/npmc/overview.shtml			

NSDA Programs and Services Outside of the Competitive Transition Framework					
Name	Description	Web Address	TS	SPI	PGS
Business Risk Management Programs	<p>1. AgriInvest: AgriInvest accounts help producers protect their margin from small declines of less than 15%. Each year, producers will make a deposit into an AgriInvest account, and receive a matching contribution from federal and provincial governments. Producers will have the flexibility to use the funds to cover small margin declines or for risk mitigation and other investments.</p> <p>2. AgriStability: The producer receives an AgriStability payment when his/her current year program margin falls below 85% of his/her reference margin.</p> <p>3. AgriRecovery: AgriRecovery allows federal and provincial governments to jointly respond to natural disasters (e.g., disease, weather) with quick, targeted assistance. The purpose of the program is to help affected producers resume business operations and/or take actions to mitigate the impacts of a disaster as quickly as possible.</p> <p>4. AgriInsurance: The program includes existing production insurance, and provides coverage for production and asset losses caused by natural perils. Coverage is expanding to include livestock and additional horticultural crops.</p>				
Harness Horse Administration	To help make the harness horse industry in Nova Scotia more competitive and self-sufficient.				
School Milk	To provide white milk to school children in Nova Scotia at a reduced price.				
Farm Registration	To register farms in Nova Scotia.				

Appendix B:

Catalogue of Programs and Services in Other Departments and Agencies in Support of Competitive Transition

SPI: Strategic Public Investment

TS: Transition support

PGS: Public Goods and Services

Nova Scotia Economic and Rural Development

Program Name	Description	Web Address	SPI	TS	PGS
Community Economic Development Funds	To enable Nova Scotians to keep investment dollars working in their communities by pooling their money in local investment funds to provide capital to local businesses and support economic growth. CEDIF's are pools of capital which are available for investment into businesses in their communities. These funds are controlled by a local board of directors, which are chosen by the funds' investors at an annual general meeting. There is no existing government program to cover administration or operating costs. A community must rely on its own energies and potential, and the drive, and commitment of its residents to develop effective Community Economic Development Corporations. Potential sources for start-up capital include local corporations that may be users of the fund, municipalities that would have a vested interest in seeing such funds development, local entrepreneurs, community or business leaders, as well cultural groups or unions.	http://gov.ns.ca/econ/cedif/	X	X	

Program Name	Description	Web Address	SPI	TS	PGS
Small Business Loans Program	A joint initiative of the Nova Scotia Co-operative Council, Credit Union Central of Nova Scotia, local credit unions, and the Nova Scotia Office of Economic Development. Applicants must be residents of Nova Scotia who wish to start a business, or companies or co-operatives in the province who intend to grow their businesses.	http://www.nscouncil.ca/serve_loanprogram.php		X	
Productivity and Innovation Voucher Program	To stimulate additional productivity and innovation projects among SME's and enhance linkages between SME's and public institutions that provide needed expertise and assistance. (Closed at present)	http://gov.ns.ca/econ/pnivouchers/faq.asp		X	
Nova Scotia Business Development Program	To help small businesses get started and existing business expand. This program will encourage business start-ups and provide help through qualified consultants for business operators to review and assess their practices and develop new approaches to ensure success. Government assistance for eligible business activity includes: training and recruitment; market research and business plan development; advertising and promotional plans; visual merchandising techniques; and fiscal management tools. Approval is based on merit and made upon the recommendation of the Regional Manager of the ERD.	http://www.gov.ns.ca/econ/nsbdp/		X	

Program Name	Description	Web Address	SPI	TS	PGS
Industrial Expansion Fund	The IEF supports industries involved with innovation and technology. It is frequently used to assist the development initiatives of other departments and agencies, or to find a solution when a potential opportunity falls outside the programs available.	http://www.gov.ns.ca/econ/IEFreport/	X		
Canada / Atlantic Provinces Agreement on International Business Development	Strives to increase exporting in Atlantic Canada by funding projects designed to help small and medium-sized companies to explore, enter and succeed in international markets.	http://www.acoa-apeca.gc.ca/English/ibda/Pages/HomePage.aspx		X	
Short-Term Equity Fund	No details available.	http://www.nscouncil.ca/services/shorttermequityfund.php		X	
Immigrant Small Business Loans Program	To help establish new businesses, grow existing businesses and empower entrepreneurs with the support they need to create employment for themselves and others. This program targets recent immigrants who have lived in Nova Scotia no more than five years who cannot access other small business loans and wish to start a small business, acquire an existing business and/or grow an existing business. This program is available across Nova Scotia through credit unions.	http://www.nscouncil.ca/services/microcredit.php		X	

Program Name	Description	Web Address	SPI	TS	PGS
Strategic Opportunities Fund	Participation in this federal Immigrant Investor Program means that the provincial government can provide loans of at least \$1 million for projects that contribute to the government's economic development plan - opportunities for Sustainable Prosperity. Qualified foreign investors make an investment of \$400,000 in return for the ability to immigrate. The federal government loans the money to the province for investment, then the province returns the \$400,000 to the federal government in five years. They in turn return it to the immigrant investor. Nova Scotia companies and organizations can submit proposals in areas such as job creation, export development, information technology, environmentally sustainable infrastructure, manufacturing and production.	http://www.gov.ns.ca/econ/nssofi/	X	X	

Nova Scotia Environment

Program Name	Description	Web Address	SPI	TS	PGS
ecoNova Scotia Environmental Technology Program	To support Nova Scotia organizations involved in environmental technologies and innovations that reduce greenhouse gases and other air pollutants. To build capacity in Nova Scotia for further emissions reductions. All projects must be identified by March 31, 2010, and completed by March 31, 2011. Categories include: technology development and commercialization; and technology adoption and deployment, pilot and demonstration projects.	http://gov.ns.ca/nse/climate.change/	X		

Program Name	Description	Web Address	SPI	TS	PGS
Young Entrepreneur Development Program	Offers financial support to non-profit business organizations for business skills training for entrepreneurs under 35 years of age.	http://www.acoa-apeca.gc.ca/English/ImLookingFor/ProgramInformation/Pages/ProgramDetails.aspx?ProgramID=7	X		
Innovative Communities Fund	Invests in strategic partnerships that build the economies of Atlantic Canada's communities. ICF focuses on investments that lead to long-term employment and economic capacity building in rural communities. The purpose of ICF is to diversify and enhance the economies of Atlantic communities. ICF capitalizes on the opportunities and strengths that exist in these communities to: develop competitive, productive, strategic industry sectors; strengthen community infrastructure; and invest in projects that enhance communities' capacity to overcome economic development challenges and take advantage of their strengths, assets and opportunities presented. Eligible recipients include not-for profit organizations, industry/sector associations, local co-operatives, etc.	http://www.acoa-apeca.gc.ca/English/ImLookingFor/ProgramInformation/Pages/ProgramDetails.aspx?ProgramID=6	X		

Program Name	Description	Web Address	SPI	TS	PGS
Women In Business Initiative	ACOA provides financial support to non-for-profit business organizations in Atlantic Canada to offer women business owners the resources they need to grow their businesses and compete.	http://www.acoa.ca/English/ImLookingFor/ProgramInformation/Pages/ProgramDetails.aspx?ProgramID=4	X		
Atlantic Innovation Fund	Helps Atlantic Canadians compete in a global knowledge-based economy through the development of new ideas, products, businesses and markets. (Funding no longer available?)	http://www.acoa-apeca.gc.ca/English/ImLookingFor/ProgramInformation/AtlanticInnovationFund/Pages/AIFProgramOverview.aspx		X	
Community Adjustment Fund	To support activities such as science and technology initiatives, community transition plans that foster economic develop and other measures that promote economic diversification. (Fully invested at the moment?)	http://www.acoa-apeca.gc.ca/English/ImLookingFor/ProgramInformation/CAF/Pages/Home.aspx	X	X	

Program Name	Description	Web Address	SPI	TS	PGS
Business Development Program - Developing Your Innovative Ideas	ACOA aims to support Atlantic Canadian small and medium sized enterprises with unsecured, interest-free provisionally repayable contributions to help cover up to 75% of the eligible costs of developing new or improved products, services and processes.	http://www.canadabusiness.ca/server/ContentServer?cid=1081944213439&lang=en&pagename=CBSC_FE%2Fdisplay&c=Finance		X	

Agriculture Canada

Program Name	Description	Web Address	SPI	TS	PGS
Slaughter Improvement Program	To strengthen the competitiveness of the red meat industry by providing interest-free, conditionally repayable contributions aimed at supporting investments to make operational improvements and modernize and will support investments to enhance slaughter capacity in regions that have a demonstrated regional gap that is constraining sector growth.	http://www4.agr.gc.ca/AFC-AAC/display-afficher.do?id=1245952132941&lang=eng	X		
ecoAgriculture Biofuels Capital initiative	Will provide repayable contributions of up to \$25 million per project to help farmers overcome the challenges of raising the capital necessary for the construction or expansion of biofuel production facilities.	http://www.ecoaction.gc.ca/ecoagriculture/biofuels-biocarburants-eng.cfm	X		

Program Name	Description	Web Address	SPI	TS	PGS
Agri-Opportunities Program	Provides funds to accelerate the commercialization of new agricultural products, processes or services.	http://www.canadabusiness.ca/servlet/ContentServer?cid=1170045091209&lang=en&pagename=CBSC_FE%2Fdisplay&c=Finance		X	
Developing Innovative Agri-Products	Supports industry-led science and technology projects that bridge the gap between ideas and discoveries and products in the marketplace. These investments will pay off as innovation creates new economic opportunities for farmers, businesses and communities. This program involves two streams: innovation strategy development; and implementation of applied science, technology development and pilot projects.	http://www4.agr.gc.ca/AFC-AAC/display-afficher.do?id=1240409661030&lang=eng	X	X	

Program Name	Description	Web Address	SPI	TS	PGS
Agri-Flex	A five year (2009-2014) \$500 million fund to help implement new initiatives, both federally and in partnership with provinces, territories, and industry. To improve the sector's competitiveness and help the sector reduce costs of production, improve environmental sustainability, promote innovation and respond to market challenges. Provinces and industry associations can apply, universities and colleges eligible.	http://www4.agr.gc.ca/AFC-AAC/display-afficher.do?id=1247082294164&lang=eng	X	X	
Canadian Agri-Science Clusters	Funding will help industry-led agricultural organizations pull together national scientific and technical resources to establish Canadian Agri-Science Clusters. Clusters will support the implementation of applied science activities and pre-commercialization strategies that address national sector priorities, activities and market opportunities and support innovation for enhanced profitability and competitiveness. Funding between 25% and 75% of eligible expenditures, to a maximum of \$16 million per cluster. Applicants must contribute to expenses incurred by or for the cluster with a minimum 25% cash contribution. Applicants are encouraged to submit their Canadian Agri-Science Cluster Proposals for review no later than January 31, 2010.	http://www4.agr.gc.ca/resources/prod/doc/prog/gf/1240337706422_e.pdf	X		

Nova Scotia Labour and Workforce Development

Program Name	Description	Web Address	SPI	TS	PGS
Youth Apprenticeship	To help youth (16-19 years old) explore careers in the skilled trades and to begin working towards their apprenticeship.	http://www.nsapprenticeship.ca/	X		

Nova Scotia Business Inc.

Program Name	Description	Web Address	SPI	TS	PGS
NSBI Business Financing	<p>NSBI provides a variety of financing options.</p> <p>1) Loans and Loan Guarantees: To support businesses of any size: to purchase land or improvements to lands; to purchase or construct buildings and other structures, expansions or renovations to existing buildings and other structures where these structures are used in businesses; constructions or purchase of equipment, furnishings, and other fixed assets; provision of working capital-based financing in certain limited and well-defined circumstances.</p> <p>2) Payroll Rebates: To help companies improve their competitiveness in export markets through productivity improvements or investments in product development, as well as companies locating or expanding in the province.</p>	http://www.novascotiabusiness.com/en/home/Grow/financialservices/default.aspx		X	

Program Name	Description	Web Address	SPI	TS	PGS
ExportAbility Program	Designed to provide funding to ensure that Nova Scotia small and medium-sized enterprises are equipped with the skills they need to become export savvy. The program supports continuing professional development in the practice of international trade.	http://www.novascotiabusiness.com/en/home/Grow/exportandtrade/ExportAbility.aspx		X	
GAP Go-Ahead Program	Helps small and medium-sized enterprises realize their export and revenue growth potential by supporting firms to pursue export opportunities. GAP provides support to SME's in Nova Scotia to develop export sales outside the Maritime provinces. The program will help cover the costs of follow-up market visits to prospects identified or pursued during a previous provincial government or export agency initiative, including trade missions, shows or conferences.	http://www.novascotiabusiness.com/en/home/Grow/exportandtrade/GoAheadProgram.aspx		X	

Program Name	Description	Web Address	SPI	TS	PGS
Service Export Program	Designed to provide funding to Nova Scotia companies, with a focus on small and medium sized enterprises seeking to seize export opportunities in the service sector. The program helps cover the costs for in-market meetings with prospective partners and clients that have a high potential for significant business benefits to the company. SEP also supports the development of proposals, presentations, or collateral materials specific to this export application.	http://www.novascotiabusiness.com/en/home/Grow/exportandtrade/ServiceExportProgram.aspx		X	
NSBI Venture Capital	Invests in mid to late stage Nova Scotia businesses to: help build value in Nova Scotia businesses, provide growth capital to build market traction, generate superior long-term financial returns, harvest acquisition opportunities with an interest in retaining business operations in Nova Scotia, prepare clients for a successful and rewarding exit.	http://www.novascotiabusiness.com/en/home/Grow/VentureCapital/default.aspx		X	
Export Prospector Program	Offers the opportunity to participate in a trade mission designed specifically for your schedule, your market interests and your products and services.	http://www.novascotiabusiness.com/en/home/Grow/exportandtrade/exportprospectorprogram.aspx	X	X	

Regional Development

Program Name	Description	Web Address	SPI	TS	PGS
Community Development Partnership, Building Rural and Northern Communities (Canada's Rural Partnership)	Offers a limited amount of funding to assist rural and northern regions to obtain information and access/develop the expertise, tools and processes to respond to challenges and opportunities, and to become competitive.	http://www.rural.gc.ca/RURAL/display-afficher.do?id=1242239600032&lang=eng	X	X	
Cape Breton Growth Fund	Makes investments to foster sustainable economic growth and job creation on Cape Breton Island.		X	X	
Technology Development Fund	To support small and medium-sized businesses in Atlantic Canada. Provides an opportunity to enhance, expand or start a business using various technologies. The fund also encourages the development and commercialization of technologies from basic computerization to uncharted concepts and beyond.	http://cumberland-cbdc.ca/tdf.htm	X	X	
Community Business Development Corporations: Self-employment Benefit Program	The SEB program allows participants to continue to receive their Employment Insurance Benefits while they are getting their business up and running.	http://www.cbdc.ca/programs.php?id=3		X	

Conserve Nova Scotia

Program Name	Description	Web Address	SPI	TS	PGS
Energy Efficiency Programs	<p>Solar Hot Water Heating Rebate: Conserve Nova Scotia provides a 15% rebate of the installed cost of a solar water heating system for institutional, industrial or commercial use. This program expires on March 31, 2010.</p> <p>Solar Air Heating Rebate: Conserve Nova Scotia provides a 15% rebate of the installed cost of a solar air heating system for institutional, industrial or commercial use. This program expires on March 31, 2010.</p>	http://www.conservens.ca/for-your-business/programs.asp			
Eco-Efficiency Program for Manufacturers	Provides financial incentives for NS manufacturing companies to take a critical look at their businesses and make changes that mean more efficient operations.	http://www.conservens.ca/for-your-business/tools.asp#CIP			

Nova Scotia Tourism, Culture and Heritage

Program Name	Description	Web Address	SPI	TS	PGS
Tourism Marketing Opportunities Program	Provides co-operative marketing support to initiatives to help strengthen our tourism brand, showcase our province, and grow tourism revenues. (Closed for 2009)	http://www.gov.ns.ca/tch/tourism_marketing_assistance.asp		X	

Program Name	Description	Web Address	SPI	TS	PGS
Tourism Development Investment	To enhance the growth, competitiveness and sustainability of tourism in NS.	http://www.gov.ns.ca/tch/tourism_development_investment.asp	X	X	

Nova Scotia Fisheries and Aquaculture

Program Name	Description	Web Address	SPI	TS	PGS
Adopt-A-Stream	Provides funding for stream and fish habitat rehabilitation.	http://gov.ns.ca/fish/sportfishing/extension/adopt.shtml			X

Natural Resources Canada

Program Name	Description	Web Address	SPI	TS	PGS
ecoENERGY for Renewable Power	To help Canadians use energy more efficiently, boost renewable energy supplies and develop cleaner energy technologies.	http://www.canadabusiness.ca/servlet/ContentServer?cid=1178681680972&lang=en&pagename=CBSC_FE%2Fdisplay&c=Finance	X		X

Environment Canada

Program Name	Description	Web Address	SPI	TS	PGS
Ecological Gifts Program	Enables donors of certified ecologically sensitive land, or partial interests in such land, to obtain enhanced tax benefits.	http://www.canadabusiness.ca/servelet/ContentServer?cid=1081944219084&lang=en&pagename=CBSC_FE%2Fdisplay&c=Finance			X
Habitat Stewardship Program for Species at Risk	To contribute to the recovery of endangered, threatened, and other species at risk, and to prevent other species from becoming a conservation concern, by engaging Canadians from all walks of life in conservation actions to benefit wildlife. The HSP provides funding to 'stewards' for implementing activities that protect or conserve habitats for species designated at risk.	http://www.cws-scf.ec.gc.ca/hsp-pih/default.asp?lang=En&n=59BF488F-1			X
EcoAction Community Fund	Provides financial support to community groups for funding that have measureable, positive impacts on the environment. Projects require matching funds or in-kind support from other sponsors.	http://www.ec.gc.ca/ecoaction/what_is_e.html			X

InNOVAcorp

Program Name	Description	Web Address	SPI	TS	PGS
Early Stage Commercialization Fund	Helps move Nova Scotia university and community college research to markets. Funds can be used to validate market potential, develop business plans, perform proof of concept research or market studies, assist with intellectual property protection strategies, build prototypes, and leverage other funds.	http://innovacorp.ca/about-us/early-stage-commercialization-fund		X	
Nova Scotia First Fund	Targets emerging venture-grade technology companies with high growth potential and attractive risk-return prospects. Key industries include: clean technology, information and communications technology, and life sciences.	http://innovacorp.ca/what-we-do/investment		X	

Industry Canada

Program Name	Description	Web Address	SPI	TS	PGS
Small Business Financing Program	Under this program, the Government of Canada makes it easier for small businesses to get loans from financial institutions by sharing the risk with lenders.	http://www.ic.gc.ca/eic/site/csbfp-pfpec.nsf/eng/h_la02855.html	X	X	

Business Development Bank of Canada

Program Name	Description	Web Address	SPI	TS	PGS
Innovation Financing	Provides loans that established business can use as working capital to explore new markets and develop new products and new technologies.	http://www.canadabusiness.ca/servlet/ContentServlet?cid=1081944213805&lang=en&pagename=CBSC_FE%2Fdisplay&c=Finance		X	
Market Expansion Financing Program	Provides up to \$50,000 in long-term financing to entrepreneurs who want to grow their businesses locally or expand into foreign markets.	http://www.canadabusiness.ca/servlet/ContentServlet?cid=1184872537997&lang=en&pagename=CBSC_FE%2Fdisplay&c=Finance		X	

Program Name	Description	Web Address	SPI	TS	PGS
Buy Equipment	Business Development Bank of Canada offers financing and consulting solutions to help entrepreneurs finance the cost of new or used equipment.	http://www.canadabusiness.ca/servlet/ContentServer?cid=1081944214349&lang=en&pagename=CBSC_FE%2Fdisplay&c=Finance		X	

Farm Credit Canada

Program Name	Description	Web Address	SPI	TS	PGS
Farm Credit Canada (Producer Financing)		http://www.fcc-fac.ca/en/Products/Lending/lending_e.asp		X	
Farm Credit Canada (Agribusiness and Agri-food financing):		http://www.fcc-fac.ca/en/Products/AgribusinessFinancing/index.asp		X	

Program Name	Description	Web Address	SPI	TS	PGS
Farm Credit Canada (FCC Alliances Financing)		http://www.fcc-fac.ca/en/Products/AlliancesFinancing/index.asp		X	

Commercial Lending

Program Name	Description	Web Address	SPI	TS	PGS
TD Bank	Offers Farm Improvement Loan, Agriculture Term Loan, Farm Mortgage, Rural Property Mortgage, Dairy Term Loan, etc.	http://www.tdcanadatrust.com/agriculture/agloan.jsp		X	
CIBC	Day to day banking, loans, lines of credit, investment solutions, protection, and agriculture banking specialists.	http://www.cibc.com/ca/small-business/agriculture-serv.html		X	
Royal Bank of Canada	A range of services for farm businesses including mutual funds, investments etc.	http://www.rbcroyalbank.com/RBC:SIIF7I71JsUABhBKLA Y/agriculture/investments.html		X	

Program Name	Description	Web Address	SPI	TS	PGS
Bank of Montreal	Services including farm equipment line of credit, farm mortgages, agri-readiline, loans, and a dairy program.	http://www4.bmo.com/business/0,2273,35490_36079,00.html		X	
Scotiabank	Services including ScotiaFlex for agriculture, Scotiaone Account Plan for agriculture, Credit line for agriculture, Farm Improvement Loan, Scotia Farm Mortgage Loan, Scotia Farm Legacy Services.	http://www.scotiabank.com/cda/content/0,1608,CID8967_LIDen,00.html		X	
Small Business Finance Centre	Provides a range of programs and services, including: loans (low-interest or no-interest, and government guaranteed loans), grants and subsidies (one time and renewable, equity financing, and conditionally repayable contribution), tax breaks (tax refunds or tax credits), and business advantages (government insurance against business risks, government relocation incentives, government information and services, and access to resources).	http://www.grants-loans.org/programs.php	X	X	

Program Name	Description	Web Address	SPI	TS	PGS
Microcredit Program	A joint initiative of the Nova Scotia Co-operative Council, the Rural Secretariat, St. Francis Xavier University, Credit Union Central of Nova Scotia, and Nova Scotia credit unions. Three Nova Scotia credit unions are piloting the microcredit financing project aimed at providing those most in need of credit for small business development with access to existing community financial services. The program specifically targets groups facing the greatest difficulty in securing traditional loans - immigrants, women, people with disabilities, youth and rural communities - to foster growth of new and existing businesses within Nova Scotia. Some exceptions apply in terms of who can apply. Program is available through credit unions in Antigonish, Amherst and Halifax.	http://www.ns-credit-unions.com/default.asp?mn=1.19.33.98		X	

Miscellaneous Environment Programs

Program Name	Description	Web Address	SPI	TS	PGS
Sage Environmental Program	A grants program focused on protected areas, compromised areas, and emerging issues / urban growth and development.	http://www.sagegreen.ca/grants.html			X

Program Name	Description	Web Address	SPI	TS	PGS
Imperial Oil Community Investment	Imperial Oil/Esso Canada provides grants and funding to math, science, technical education and land, air, water and energy programs.	http://www.imperialoil.ca/Canada-English/ThisIs/Community/TI_C_FundingApplying.asp	X		X
ecoENERGY Retrofit Incentives for Buildings	For existing homes, buildings and industrial processes.	http://www.ecoaction.gc.ca/ECOENERGY-ECOENERGIE/buildingshouses-batimentshabitations-eng.cfm			X
ecoENERGY for Biofuels	Provide operating incentives to producers of renewable alternatives to gasoline and diesel based on production levels and other factors.	http://www.ecoaction.gc.ca/ECOENERGY-ECOENERGIE/biofuelsincentive-incidentifsbiocarburants-eng.cfm	X		X

Additional Miscellaneous Programs

Program Name	Description	Web Address	SPI	TS	PGS
Cooperative Development Initiative	The program has three interrelated components, one of which is ‘The Innovative Co-operative Projects’ component, which provides funding to innovative projects that respond to public policy priority areas and generate best practices and learning.	http://www.coop.gc.ca/COOP/display-afficher.do?id=1232543849777&lang=eng	X	X	

References

- 1 Nova Scotia Department of Finance. NSDA file DA09015. 
- 2 Statistics Canada, Census of Agriculture, 2006 (<http://www.statcan.gc.ca/ca-ra2006/index-eng.htm>)
- 3 Nova Scotia Agricultural Statistics 2008, Table 2 (<http://www.gov.ns.ca/agri/marketing/statistics/agriculture/table2-2008.pdf>)
- 4 Nova Scotia Agricultural Statistics 2008, Table 5 (<http://www.gov.ns.ca/agri/marketing/statistics/agriculture/table5-2008.pdf>)
- 5 Nova Scotia Agricultural Statistics 2008, Table 15 (<http://www.gov.ns.ca/agri/marketing/statistics/agriculture/table15-2008.pdf>)
- 6 Nova Scotia Agricultural Statistics 2008, Table 23 (<http://www.gov.ns.ca/agri/marketing/statistics/agriculture/table23-2008.pdf>)
- 7 Nova Scotia Agricultural Statistics 2008, Table 21 (<http://www.gov.ns.ca/agri/marketing/statistics/agriculture/table21-2008.pdf>)
- 8 Nova Scotia Agricultural Statistics 2008, Table 22 (<http://www.gov.ns.ca/agri/marketing/statistics/agriculture/table22-2008.pdf>)
- 9 The GPI Soils and Agriculture Accounts: Economic Viability of Farms and Farm Communities in Nova Scotia and Prince Edward Island-An Update, GPI Atlantic, August 2008.
- 10 Feedback from 17 Competitive Transition Analysis Group Workshops with commodity boards and county Federation of Agriculture held across Nova Scotia between July – October 2009.