

HRM's Review and Renewal of the Economic Strategy 2011 - 2016

Insurance Consultation

Monday, June 14, 2010

1:30-4:30 p.m.

Location: Four Points by Sheraton, Compass Room

Champion: Bill Adams, Insurance Bureau of Canada

Facilitator: Joanne Akerboon, Dalhousie University

Participants

- Fred Morley, Greater Halifax Partnership
- Bruce Fisher, HRM
- Catherine Decarie, TD Insurance Meloche Monnex
- Eric Nobbe, Nova Scotia Business Inc.
- Bill Gullage, Flagstone
- Gordon Murray, Aviva Insurance Company of Canada
- Rick Piper, Medavie Blue Cross
- Jamie Reid, AP Reid
- Glen Bates, RSA
- Sarah Amirault, Fairway Insurance
- Ken Myers, Insurance Brokers of Nova Scotia
- Bill Adams, Insurance Bureau of Canada

Table Recorders

- Allan Cocksedge, Greater Halifax Partnership
- Wendy Donaldson, Greater Halifax Partnership
- Tom McDonell, Greater Halifax Partnership

Session Recorder

- Krista Hall, Greater Halifax Partnership

Observers

- Jim Donovan, HRM

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Opening Remarks – Bill Adams

1. Project Overview
2. Participant Introductions

Session Introduction – JoAnne Akerboon

1. Meeting Flow
2. Data Collection Overview
3. Ground Rules

Participant Feedback

Opportunities and Challenges

What is your overall reaction to the opportunities and challenges?

- Some of the challenges are really opportunities and vice versa.
- More challenges than opportunities
- Thought the list was overall complete.
- To some extent NS has been insulated from the recession. But those who work for global companies were affected.
- Lots of centralization and consolidation in our industry - insurers and brokers. The number of employers and corporate offices have decreased. The effect is up for debate.
- There has been lots of centralization
- Affected by global influences
- There has been lots of acquisitions

Is the list complete? If not, what is missing?

- A piece about lifestyle/quality of life should be more prominent
- Have not articulated the opportunity in green technology
- Incentives / tax burden

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From the point of view of your sector, which opportunities and challenges are the most important/least important and why? ** Note: There were three tables of participants. Each table ranked the opportunities and challenges. Each Table = x

From the Point of View of your sector, which opportunities and challenges are the most/least important and why?	Most Important				Least Important
	1	2	3	4	5
Hub City Strategy	XX	X			
High Value Jobs	XX	X			
Alignment	X	X			
High Education Level		XXX			
Concentration of Post-secondary institutions		XX	X		
Demographic Shift	X	XX			
Population Growth	X	X			
Taxation	XXX				
Regulation	XXX				
Inertia/resistance	XX				
Missing the Green Wave			X	X	
Productivity Growth		X			
Partnership and Alignment		X			
International Focus			XX		
Myths on Growth Drivers Need Correcting		X			
Overdue Public and Private Investment in the Downtown Core	XXX				
High Carbon Dependence			X		

Plenary Comments

- Opportunities met challenges and vice versa
- Most important to our sector:
 - Hub city strategy
 - High-value jobs
 - Alignment
 - Inertia
 - Talent
 - People in this industry have a high level of education. The industry pays for professional development.
 - Opportunity to attract and retain students
 - Demographic shift
 - Investing in the downtown core
 - Taxes – need to reduce personal and corporate taxes
 - Need for stronger leadership
 - Smarter regulation
 - Better taxation system

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- Reduce council - Councilors should take on a more urban or holistic perspective
- Least important to our sector:
 - International Focus
 - Missing the Green wave
 - High Carbon dependence
- Taxation
 - Talked about taxation in terms of connection to high-value jobs. Not great incentives to attract and retain people.
 - Ok with paying taxes, but there is a disconnect between what we pay for and the services we get. We're not expecting taxes to go down but we need improvement here.
 - Personal tax is too high
 - Absolutely need to have it to create high-value jobs
- Demographic Shift
 - This is a big issue for insurance brokers. Who are going to be our future customers?
 - Provide opportunities for students to stay and work in Halifax
- High-value jobs
 - Agree with the statement on high-value jobs
 - If we are moving towards high-value jobs we need to be able to recruit
 - What is a high-value job? It takes time to get the high-value job. You don't get these right out of university.
 - Nova Scotia does not offer a course (training) in insurance
- Regulation
 - Disagree that it's a challenge. There is an opportunity to change regulation in the area of captive insurance. BC has done it. We should look at the cost benefit analysis.
 - Our industry is a self-regulated industry. Less regulation is good but we're really looking for smarter regulation to promote growth. Government spends too much time trying to regulate our industry instead of working with us develop regulation that will help us grow.
 - Over-regulation – lack of appreciation of economic impact of insurance industry
 - No consistency between provinces. Need cross-border agreements / harmonization
- Green Wave
 - Need to pay attention to this if we want to attract young and emerging professionals
 - Not missing anything / not a challenge
 - Emphasis on green tech – some of the challenges in this area could be opportunities

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- Hub City
 - Halifax as a hub city should be recognized and the federal government should be making investments.
 - We shouldn't compete with other cities in Atlantic Canada
 - What is the hub city? It's a very large area we're talking about and the reach is significant.
 - Halifax as representative hub for Atlantic Canada
 - Agree that hub has spokes – build development outward. We need a vibrant Halifax to benefit development in the region.
 - Is "hub" the right terminology – too transportation oriented
- Concentration of post-secondary institutions
 - Gives us an opportunity to attract and retain lots of talented people
 - Opportunity to promote Halifax as a great city to live and work
 - 25% of graduating students want to stay in Halifax. Presents an opportunity to grow our population.
 - NSCC is doing a great job
 - Universities do a good job of attracting students
 - Population's high-education levels is a strength
- Growth Sector focus
 - There really needs to be a better understanding that the way the economy was structured in the 1900s isn't the same as it is today. Governments tend to be focused around the resource based sectors. They tend to be better aligned with the priorities of the province. We shouldn't collapse these but there needs to be more alignment and focus on the new economic drivers of the economy – like the finance and sector industries.
- Overdue investment in the downtown core
 - Investment in our downtown core is long overdue
- Partnership / Alignment
 - How do you realign priorities with "same skill set" of employees (education, training, forecasting needs)
 - Government works in silos – perhaps antiquated model
 - Government should focus on the needs of the business community
 - Better recognition of new drivers of development – where to invest.
 - Need the four Atlantic provinces to work together
 - Lack of leadership
 - It's politically correct to spread seeds evenly throughout the province
 - Remove bureaucracy / reduce council
 - Councilors need to think more globally

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- Productivity and Growth
 - Agree that we have the worst productivity
- International Focus
 - Natural resources are declining
 - Move to urban, service-based industry

Vision Statements

What is your first reaction?

- The vision statements may be too globally focused
- Want to create a positive image when we talk about Halifax
- Seem aspirational rather than practical
- Missed a bit of emphasis on growth.
- The quantifiable measures, from the perspective of a business considering moving here or a politician, are probably more important than the “hub city” concept.
- The shift between the traditional municipal focus on that municipal unit recognizing that if you are going to be the hub there is a responsibility that comes with that. Need to recognize that the spokes are important and need to be nurtured for this structure to work. We need “to be” not just say we are the hub.
- Liked the Vision #1 with some of the bullets from #2
- Like the internationally oriented piece in both statements
- Like “hub city” and “quality of life that is the envy of the world”
- Vision #1
 - Vision #1 is “warm and fuzzy”. It’s something you can attach a brand too. We need to start selling Halifax as a brand. We need to define our brand.
 - This statement is more visionary
 - Like #1, but there needs to be some quantifiable measures in that statement
 - Like the use of “diversity”
 - Diversity is an important aspect in Vision #1
 - Liked Vision #1 better. Identified with it more. Should bring in some aspects from #2 like “youth” and “smart”. Recognized the industry in #1 in general
 - Halifax NS, Atlantic Region...add the rest of Canada (as the big picture)
 - Missing “retain” in the attract talent bullet.
 - Rallied around the last bullet about quality of life
 - Weren’t sure about “more than” statements. More than what?
 - It says “Halifax” rather than HRM.
 - Thought the industry is represented in that statement and probably more aligned to the hub city concept than most sectors. Regional concentration of skills in Halifax. This is an industry centered in Halifax which the rest of the region benefits from.
 - Each sector could interpret “global” as particular to their global market
 - Competitive city – we need to set the bar higher than Atlantic Canada. Where are we going to play up our international business? Look at what percentage of our GDP is internationally focused and play on that.

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- Would like to see education included in this statement – something around retaining students in Halifax
- Vision #2
 - Perhaps use the first line from Vision #2 as a tagline. Include the words “smart, international and competitive city.”
 - Like second sub-bullet of Vision 2

Questions 2, 3 and 4 - ** Note: There were three tables of participants. Each table ranked the opportunities and challenges. Each Table = x

Vision			
	Yes	No	Notes
Do the statements describe what we want to be in HRM?	x		<ul style="list-style-type: none"> ● The visions describe what we want to be when we grow up. <p>Like the following:</p> <ul style="list-style-type: none"> ● Hub city ● Regional offices ● Quality of life ● High-value, sustainable jobs ● More aligned to hub city concept <p>Missing</p> <ul style="list-style-type: none"> ● Youth ● Education
Are the statements valid?	xx		<ul style="list-style-type: none"> ● Agree trickle effect does happen ● Yes, with some tweaking
Do you see your sector's future represented in the statements?	xx		<ul style="list-style-type: none"> ● “quality of life that is the envy of the world” is key ● 1st vision is better

If not, what changes would you propose?

- Hub needs to recognize the responsibility of a hub city. Don't just say you are a leader, be a leader.

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- Insurance recognized in specific global markets
- Add youth
- Add "retain" to high-value jobs statement
- Remove "more"
- Change "jobs" to "growth"
- Education piece is missing
- Change "envy of the world"
- Change "HRM" to "Halifax"
- Need to define our brand to the rest of the world or at least the rest of Canada
- Vision #1, bullets
 - "Increased economic and social well-being."
 - Delete "more" from second bullet point
- Vision #2, bullets
 - Delete bullet #3

Priority Areas and Strategic Goals

1. Do you agree with the areas and goals? If not, what do we need to add, revise or remove?

**** Note:** There were three tables of participants. Each table ranked the opportunities and challenges.
Each Table = x

Priority Areas & Strategic Goals: Do you agree with the areas and goals? If not, what do we need to add, revise or remove?						
	Agree	Disagree	Add	Revise	Remove	Comments
More and better qualified people for high wage and more productive jobs	xxx			x		• Add "retain"
Development of a vibrant and attractive urban core as the primary economic driver	xxx					
Development of an "ecosystem" of entrepreneurship to reduce commercial risk and improve productivity	xx	x		x		
Market and enhance assets of Halifax as a "Global City"	xx			x		

Qualitative Comments

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- Generally agreed with the four priority areas.
- Need to make adjustments to the strategic goals
- Some debate about the order of 1 and 2.
- Need to be open to change. Those who favour change need to make their voices louder. Often the minority, negative, voices are the ones that are heard.
- Lots of connections between the four goals. For example, if we develop the downtown we will attract more people.
- Too much focus on quantity versus quality

- Priority #1
 - Put the focus on “more”. The quality has to remain but we are satisfied with this. We need more people. Retention is missing.
 - Need to focus on people – developing better immigration plans. Need a retention plan for immigrants. Are we really welcoming to immigrants? We talk the talk but we need to walk the walk. Bringing back people who are from here. Keeping people here by keeping them engaged in the community
 - Should have something about retention. It's not just about more people and jobs we need to retain those we have
 - Create a business environment that encourages young and emerging professionals to stay

- Priority #2
 - Agree with this priority area

- Priority #3
 - Agreed with the goals but weren't sure about the statement. There is a disconnect between the statement and the goals. Needs clarification.
 - Make changes to the pieces that impede growth. Determine our brand. Get our message out there. Need to develop a regulatory system that supports growth.
 - Development of an eco-system of entrepreneurship is a top priority. Taxation and regulatory reform needs to be emphasized and worked on first.
 - Talked about tax incentives. What are we going to give a new entrepreneur to stay and grow a business, keeping in mind that we don't want to compete with existing business
 - Change tax system so new entrepreneurs don't have to pay tax on the first \$100,000 they earn

- Priority #4
 - Revise. The hub piece was missing here.
 - What about “services capital”
 - We so much need to market and enhance assets of Halifax as a Global City. If we do the first three things then we won't have to do as much of this
 - A good city will market itself
 - It's not clear who the players are, but we definitely agree that we need to market Halifax to the world.

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- Discussed the relationship between the core and the hub city. Economic strategy needs to outline and promote how the hub grows the rest of the region.
- Attitude – promoting a positive attitude outward to the rest of the world. Too often Halifax is featured negatively in the media. There is a lack of big positive stories on us in the national scene.

2. Which areas and goals are the most/or least important to the future of your sector and why?

**** Note:** There were three tables of participants. Each table ranked the opportunities and challenges.

Each Table = x

Priority Areas & Strategic Goals: Which areas and goals are the most/lest important to the future of your sector and why?	Most Important					Least Important	Notes
	1	2	3	4	5		
More and better qualified people for high wage and more productive jobs	x	x					
Development of a vibrant and attractive urban core as the primary economic driver	x	x					
Development of an "ecosystem" of entrepreneurship to reduce commercial risk and improve productivity			x	x			
Market and enhance assets of Halifax as a "Global City"		x		x			

Qualitative Comments

- Most important
 - Urban core
 - More and better qualified people and retention
 - Eco-system of entrepreneurship
 - Market Halifax
- All about people - more people for high-wage and more productive jobs
- #2 & #3 are tied. Talked about the hub. About the brand.

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3. Which areas and goals should we focus on right away in order to give momentum to the implementation stage?

**** Note:** There were three tables of participants. Each table ranked the opportunities and challenges. Each Table = x

Priority Areas & Strategic Goals: Which areas and goals should we focus on right away in order to give momentum to the implementation stage?			
	Focus on Right Away	Comments	Notes
More and better qualified people for high wage and more productive jobs	#2, #2, #1		
Development of a vibrant and attractive urban core as the primary economic driver	#1		
Development of an "ecosystem" of entrepreneurship to reduce commercial risk and improve productivity	#3, #1		
Market and enhance assets of Halifax as a "Global City"	#4		

4. Do you have any thoughts on how we organize to achieve these goals?

- Do #3 first then #1
- Determine our brand and message and be aggressive in getting it out. We need to promote our culture / quality of life
- We need to be willing to accept change
- Immigration
- Make changes to pieces that impede growth
- Promote positive attitude

Additional Comments / Questions

1. What does success look like to your sector?

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- Need to get senior management in financial services and the insurance industry speaking to each other. We are all in this industry together.
- A collective voice on common issues (co-opetition). The sector wants the general public, the rest of the business community, and political leaders, to know that we are in this together. An indicator of success is all of these parties understanding and valuing financial services sector.
- Some insurance professionals are concerned about the banks becoming involved in their business. "We must keep pressure on the federal government to keep banks out of our business"
- Others don't think competitiveness should impede exploring common issues within the larger financial services sector
- Need a collective voice within the insurance industry – life & health, P&C, health insurers and brokers / consultants
- Want to create an umbrella organization to represent the financial services industry (e.g. Toronto Financial Services)
 - In aggregate, insurance is a smaller, significant, piece of the financial services sector. Greater Halifax Partnership and NSBI could work to create this organization to bring a collective voice to the larger financial sector so we can move beyond the status quo and develop the sector further. There needs to be something connecting the larger financial services sector. Too often we focus on silos, including in this industry. We don't talk to one and other about strategic issues. We need compelling leadership in order to change the things we've talked about.
- Success for the insurance industry includes:
 - Higher immigration
 - Promoting growth
 - Diversity
 - Keeping and retaining people
 - Developing a strong brand
 - Overall quality of life (housing, cultural, recreation)

Wrap-up – JoAnne Akerboon

- Promotion is very important. We have this belief that if we do something right the word will spread and people will know but that's not always true. We need to promote the vibrancy of our strong insurance sector.
- The Partnership will provide everyone who attended with a summary document from the meeting.
- As sector champion, Bill Adams will be taking the feedback from this session to the Mayor's Economic Advisory Committee

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APPENDIX – Descriptions & Questions

SECTION 1: OPPORTUNITIES AND CHALLENGES

Thinking about the opportunities and challenges below:

- What is your overall reaction to the opportunities and challenges?
- Is the list complete? If not, what is missing?
- Is the list accurate? If not, what revisions would you propose and why?
- From the point of view of your sector, which opportunities and challenges are the most important/least important and why?

OPPORTUNITIES

Hub City

- Conference Board identifies Halifax as one of 9 Canadian Hub Cities
- Halifax is Atlantic Canada's economic hub.
- Economic growth in Halifax drives an even faster rate of growth in the province and region
- Overall, the region benefits from growth in Halifax

High Value Jobs

- Halifax has critical mass in high-value sectors like Finance, Insurance and Real-estate, Digital Industries, Oceans, Life Sciences, Aerospace and others

Alignment

- Fiscal and economic challenges provide a motivation to realign priorities and spending....to focus on growth in high wage jobs and high value sectors

High Education Levels

- Halifax has among the highest post-secondary education levels of any city in Canada
- Education levels drive economic growth -Research by the US based CEOs for Cities shows that education levels in cities accounts for almost 60% of economic growth

Concentration of Post Secondary Institutions

- Halifax has among the highest concentration of post secondary education institutions and students in Canada
- The sector's value relates to its high wage direct jobs, its ability to act as a hub of research and innovation, and its role as a talent magnet

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- As enrolment of Nova Scotia-born students declines because of demographics and high costs, the ability of these institutions to attract and retain international students has significant potential

CHALLENGES

Demographic Shift

- A demographic profile close to the Canadian average within a province that has the oldest population in Canada
- Over 45,000 Nova Scotians will retire from the labour force and another 9,500 new jobs, all within the broader Halifax area, will be created by 2014
- Thus, 55,000 job openings between 2009 to 2014
- With population growth stagnant it is likely that wage pressure and the need for productivity investments will increase dramatically

Population Growth

- Up until the recent recession Nova Scotia had been battered by outflows of young professionals and skilled workers headed to areas of better economic growth and higher wages
- The population growth rate of Halifax dropped below the pace of major cities in neighboring provinces
- Immigration has been limited, slower than past trends and slower than in neighboring provinces

Taxation

- Personal taxation is higher in Nova Scotia than every Canadian province, with the largest differential at the high wage –high skill end of the spectrum
- Corporate taxation is the highest in Canada. Nova Scotia remains one of the last provinces to remove investment inhibiting capital tax
- Nova Scotia needs new investment to boost productivity and retain key companies (If a company is not investing it is dis-investing)

Regulation

- Major regulatory reform usually takes place without full consideration of the economic and business costs
- Regulatory costs affect business climate and ultimately the fiscal health of governments

Inertia/Resistance

- Sectors and groups benefiting from existing programming and current sector focus tend to resist change
- Some members of our elected leadership, the public sector, and implementing organizations may resist necessary change

Missing the Green Wave

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- Nova Scotia is among Canada's most carbon dependent provinces
- Tidal energy is an area where Nova Scotia seems to have a competitive advantage

Productivity Growth

- Nova Scotia has one of the worst productivity performances in Canada and Canada is among the worst in the G20
- A policy focus that put jobs growth ahead of quality jobs and a fiscal regulatory climate hostile to productivity improvement has hurt productivity growth

Partnership and Alignment

- There is little strategic alignment of economic development resources among federal, provincial and municipal governments and between agencies and departments of individual governments
- Lack of consensus in areas like gateway, infrastructure priorities, labour force policies and other areas has stalled progress

International Focus

- Nova Scotia has among the worst export growth of any province in Canada over the last decade
- Most business activity is focused on delivery of goods and services in local markets
- The value of externally oriented business and organizations as the key economic generators in our economy is not well understood by policy makers or business organizations

Myths on Growth Drivers Need Correcting

- "Last mile" efforts at a fully "wired" province will have limited economic benefits
- Political and economic policies that emphasize geographic balance over economic opportunity constrain growth
- Traditional areas of government policy attention often focuses on low wage, low growth, seasonal, low skill, low productivity, but vocal industries
- Nova Scotia has missed most of the early stage green-tech opportunities. Most government efforts have been on the regulatory side which often have economic costs. Government investment in Green-tech industry has been limited
- Old style politics, which features urban rural divisions hurt economic growth
- It is likely that net new growth in Nova Scotia will be in the region surrounding and including Halifax

Overdue Public and Private Investment in the Downtown Core

- About 20% of land in the downtown core is vacant land
- Beyond basic maintenance, HRM has not invested in the Core since amalgamation in the mid-90s

High Carbon Dependence

- Adds cost burden to both individuals and companies
- Contributes to greenhouse gas problems

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SECTION 2: VISION

Thinking about the vision statements below:

- What is your first reaction?
- Do the statements describe what we want to be in HRM?
- Are the statements valid?
- Do you see your future reflected in the statements?
- If not, what changes would you propose?

Vision – Alternative 1

Halifax is recognized by the rest of the world as a more creative, innovative, internationally competitive, and globally-oriented hub city providing:

- Increased economic and social well-being not only to people in the HRM but also to Nova Scotia and the Atlantic region;
- More high value and sustainable jobs that will attract highly qualified people of diverse backgrounds and;
- A quality of life that is the “envy of the world”.

Vision –Alternative 2

Halifax is recognized around the world as a smart, international and competitive city where:

- X% of the 25-45 year-old population has completed post-secondary education;
- X% of the city's GDP is driven by international business;
- Is found the most competitive business environment in Eastern Canada and;
- X number of high-value jobs have been created.

SECTION 2: PRIORITY AREAS AND STRATEGIC GOALS

Thinking about the list of priority areas and strategic goals below:

- Do you agree with the areas and goals? If not, what do we need to add, revise or remove?
- Which areas and goals are the most/or least important to the future of your sector and why?
- Which areas and goals should we focus on right away in order to give momentum to the implementation stage?
- Do you have any thoughts on how we organize to achieve these goals?

Priority Area #1: More and better qualified people for high wage and more productive jobs.

Strategic Goals:

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1. Development and implementation of a comprehensive learning strategy to re-skill workers to a level that allows them to compete for high wage and more productive jobs.
2. Development and implementation of an enhanced external recruitment and retention strategy to attract and retain high skilled workers from the rest of Canada and internationally.
3. Design and implement an engagement strategy with the young professional community to ensure their active involvement with the design and implementation of economic development initiatives
4. Design and implement a "talent" strategy to ensure that all elements of the population participate actively in the labor market.

Priority Area #2: Development of a vibrant and attractive urban core as the primary economic driver.

Strategic Goals:

1. Develop and implement an aggressive strategy to attract significant private investment to the urban core to address the issue of downtown office and residential stock
2. Implement a 5 year public infrastructure improvement program including targeted service and maintenance improvements.
3. Develop a plan for the building of renowned cultural institutions.

Priority Area #3: Development of an "ecosystem" of entrepreneurship to reduce commercial risk and improve productivity.

Strategic Goals:

1. Undertake a regulatory and tax review to identify and advocate the changes to the policies and regulations at all levels of government that impede economic growth in HRM.
2. Design an engagement strategy between the economic development organizations and the college, university and technical school community to identify and act in partnership on initiatives to support economic development, improve productivity and promote entrepreneurialism.
3. Develop and deliver a strategy for business attraction and retention that targets the creation of highly skilled jobs and limiting the exit of skilled and educated young people.

Priority Area #4: Market and enhance assets of Halifax as a "Global City"

Strategic Goals:

1. Develop and implement an enhanced trade and investment strategy that builds on the current international market development activities underway.
2. Continue the development of an internationally competitive transportation system covering all modes that supports the efficient movement of goods and people.

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3. Design and deliver a wide-reaching public relations and communications program designed to change the awareness and perception of the players in the HRM regarding the growth potential and opportunities in the international marketplace.
-