

**Directorate for Financial and Enterprise Affairs
COMPETITION COMMITTEE****Annual Report on Competition Policy Developments in Canada****-- 2019 --****10-12 June 2019**

This report is submitted by Canada to the Competition Committee FOR INFORMATION at its forthcoming meeting to be held on 10-12 June 2020.

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Canada

Executive Summary

Strong, vigorous competition benefits all Canadians. At the most basic level, competition is the force that drives us to do better. It leads to better choices, better prices, innovative products and services and creates consumer trust by ensuring accurate information in the marketplace. It leads to a stronger economy where businesses push each other to innovate while consumers are better off and more confident in their spending. The Competition Bureau (Bureau) works tirelessly to promote and protect competition through the administration and enforcement of Canada's competition and labelling laws so that Canadians have confidence and trust in the rapidly expanding and ever-evolving digital economy.

In 2018-19, the Bureau continued to bring the benefits of competition to Canadians through the actions as highlighted in this report.

1. Changes to competition laws and policies, proposed or adopted

1.1. Summary of new legal provisions of competition law and related legislation

1. No new legal provisions of competition law or related legislation were introduced in fiscal year 2018-2019.

1.2. Other relevant measures, including new guidelines

1.2.1. Guidelines

2. In September 2018, the Bureau launched a revised Immunity and Leniency Program, in collaboration with the Public Prosecution Service of Canada (PPSC). These programs encourage targets to cooperate with our investigations. Cooperating witnesses could receive immunity or leniency in return. The updates ensure that the programs keep pace with the evolving competition law environment and reflect a commitment by the Bureau and the PPSC to provide clarity, predictability and transparency for potential applicants.
3. In November 2018, the Bureau published a draft version of the revised Intellectual Property Enforcement Guidelines and invited interested parties to provide comments. A few months later, the Bureau released the final version with integrated feedback from stakeholders. The updated document clarifies the Bureau's approaches on investigations involving intellectual property. The goal is to make it easier for those with a stake in intellectual property matters to operate within the law, including legal communities and high-tech industries.
4. In March 2019, the Bureau released updated Abuse of Dominance Enforcement Guidelines, which provide an overview of the Bureau's approach to enforcing the abuse of dominance provisions of the Competition Act. The revised guidelines include various updates, such as:
 - Enhanced guidance on how the Bureau assesses certain types of anti-competitive conduct;

- The Bureau's approach to assessing non-price effects on competition, dynamic competition and innovation;
- How the Bureau considers potential remedies; and
- Examples that illustrate how Bureau analysis may be conducted.

1.2.2. Champion excellence

5. A healthy, diverse, and high-performing workforce is crucial to deliver effectively on the Bureau's mandate, driving results for Canadians. In the past year, the Bureau has continued to maintain organizational excellence by implementing the Bureau's Talent Management Strategy, and promoting a respectful, civil, diverse, healthy and inclusive work environment.

Maintain a high-performing workforce

6. To support skills development and career advancement, 56 training and information sessions were offered to employees. The focus was on improved training and greater access to learning opportunities, as well as promoting mobility to ensure a well-rounded workforce that can respond to current and emerging challenges.

Driving accountability through a performance measurement culture

7. Being accountable drives outcomes. It allows an organization to set concrete goals and measure progress. To remain accountable, in 2018-19, there were continued efforts to demonstrate progress on the Bureau's priorities and commitments by publishing the Performance Measurement & Statistics Report. The report aligns with the Bureau's 2018-19 Annual Plan and features an enhanced performance measurement dashboard, a narrative of key highlights, and performance data.

8. In May 2018, the Bureau released an impact report highlighting the key results achieved for Canadians by delivering on the Bureau's 2015-2018 Strategic Vision. Highlights include an estimated \$8.4 billion in consumer savings, more than \$19 million in customer restitution, and more than \$60 million in fines and penalties imposed by the courts for anti-competitive conduct and deceptive marketing practices.

1.3. Government proposals for new legislation

9. There were no government proposals for new legislation in fiscal year 2018-2019.

2. Enforcement of competition laws and policies

2.1. Action against anticompetitive practices, including agreements and abuses of dominant positions

2.1.1. Cartels and Bid-Rigging

10. Bid-rigging is a conspiracy among potential suppliers that occurs when there is a call for tenders to fulfill a contract. It increases costs and stifles free-market competition.

Car parts manufacturer pays a hefty fine for bid-rigging

11. In October 2018, the Ontario Superior Court of Justice rendered the thirteenth and final guilty plea in a series of international bid-rigging conspiracies among car parts suppliers. Japanese car parts manufacturer INOAC Corporation was ordered to pay \$1.3 million for its role in an international bid-rigging conspiracy. A Bureau investigation determined that INOAC entered into illegal agreements with a competing Japanese parts manufacturer. The companies conspired to determine who would win certain calls for bids issued by Toyota in 2004 for the supply of plastic interior car parts. The parts were used in Toyota Corollas manufactured and sold in Canada between 2008 and 2014.

12. The Bureau's investigation into the series of international bid-rigging conspiracies among car parts suppliers led to fines totaling more than \$86 million, including three of the largest bid-rigging fines ever imposed by the courts in Canada: \$30 million (Yazaki Corporation), \$13.4 million (Mitsubishi Electric) and \$13 million (Showa Corporation).

Safeguarding federal infrastructure investments

13. Criminal bid-rigging schemes lead to increased costs in infrastructure projects, which waiver Canadians' trust in government investments. It hurts Canadian taxpayers' pockets, making contracts more expensive than they should be.

14. The Bureau safeguarded government infrastructure spending through its large-scale investigation into municipal contracts in Quebec. The Bureau uncovered a bid-rigging scheme that targeted municipal infrastructure contracts awarded from 2002 to 2011 in the cities of Québec, Laval and Gatineau, as well as certain municipalities in the Montreal region, the period varying for each municipality and city. The Bureau and the PPSC reached a settlement with Genivar (now WSP Canada) and the firm was ordered to pay \$4 million. As part of another settlement, Dessau, a Quebec-based engineering firm, was ordered to pay a \$1.9 million settlement for its participation in the same scheme. In January 2019, Dessau's former Director and Assistant Vice-President, Outaouais, received a 12-month sentence, including 6 months of house arrest and 6 months under curfew, after pleading guilty for his involvement in the conspiracy. These outcomes shows that there is a significant price to pay for rigging bids.

Ensuring fair and transparent processes in the infrastructure sector

15. By building relationships with public procurement authorities, the Bureau can further strengthen mutual efforts to protect public contracts from bid-rigging and other criminal cartel activities. In December 2018, a memorandum of understanding (MOU) with Defence Construction Canada (DCC) was signed to enhance cooperation as both agencies work to ensure fair and competitive public procurement processes.

16. The Bureau conducted 12 promotional activities related to the Federal Contracting Fraud Tip Line to encourage those who witness or suspect unethical business practices in federal contracting to report it.

2.1.2. Deceptive Marketing Practices

17. The Bureau promotes truth in advertising by discouraging deceptive business practices and empowering consumers to make informed choices.

Building confidence in online pricing

18. Consumers should have confidence that the prices advertised online are the ones they will actually pay. Drip pricing is a practice where extra fees are added during the online buying process, causing the final price to be much higher than originally advertised.

19. In 2018-19, the Bureau continued to investigate drip pricing in the rental-car industry. The Bureau found that Discount Car & Truck Rentals Ltd. (Discount) advertised rental prices that were unattainable due to mandatory fees added later during the purchasing process, among other misleading representations. Discount agreed to pay a \$700,000 penalty and review its business practices to comply with the law. This was the fourth agreement in a series of investigations by the Bureau related to drip pricing practices by car rental companies. In total, these investigations have led to \$5.95 million in penalties and an online marketplace that Canadians can trust.

20. The Bureau continued its ongoing litigation against Ticketmaster, Live Nation and affiliated companies. This case targets potential deceptive claims made by the companies about the price of sports and entertainment tickets.

Natural health products: weight loss claims

21. In February 2019, the Bureau called on all sellers and marketers of natural health products in Canada to review their practices and ensure that weight loss claims are not false, misleading or unsubstantiated. This warning was issued to ensure businesses are compliant with the *Competition Act* when marketing these products. In collaboration with Health Canada, the Bureau will continue to work to help protect Canadians against deceptive marketing related to health products. The Bureau will also continue to monitor the marketplace carefully.

Providing advice to influencers

22. In the June 2018 edition of the Deceptive Marketing Practices Digest, the Bureau provided advertisers with advice to help ensure that the representations they make to the public are truthful and presented in a way that consumers can understand. Three marketing practices were explored: influencer marketing, "Made in Canada" claims, and savings claims.

23. Each of these can have an influence on consumers and the decisions they make. Consumers rely on the opinions and reviews shared online by influencers and believe they are genuine and impartial. They believe that Made in Canada claims signify something important about the level of Canadian manufacture that goes into a product, and when retailers make savings claims, consumers believe they are legitimate.

Bringing clarity to streaming services

24. In September 2018, the Bureau spearheaded the annual International Consumer Protection and Enforcement Network (ICPEN) internet sweep, with a focus on terms and conditions in the digital economy. Following the sweep, the Bureau issued letters to operators of online video-streaming services in Canada, advising them to review their marketing practices and related terms and conditions, to follow best practices, and comply with the law. Under the *Competition Act*, terms and conditions cannot be used to hide the real meaning of a marketing message or to bury important information, such as the true cost of a service.

2.1.3. Monopolistic Practices

Increasing access to innovative real estate services

25. Buying or selling a house is one of the most financially significant decisions for many Canadians, who generally use a real estate agent or broker to help. Having access to real estate data is critical, which usually includes current property listings and historical sales data, such as sold prices. In a big win for competition and innovation, the Supreme Court of Canada dismissed the Toronto Real Estate Board's (TREB) application in August 2018, which sought to appeal earlier decisions that required TREB to remove anti-competitive restrictions that prevented its members' from accessing and using real estate data in innovative ways. The decision gives home buyers and sellers in Canada's largest real estate market access to a greater range of innovative service options, delivered through greater competition among TREB's members.

Putting health and biosciences in the spotlight

26. The health and biosciences sector is a significant contributor to Canada's economy. It contributed \$7.8 billion to Canada's annual Gross Domestic Product (GDP) in 2016, as part of the broader health care ecosystem that represented 11% of Canada's annual GDP¹. Fostering innovation and competition in the health and biosciences sector is crucial. Competition drives innovators to produce advanced health care solutions and technologies. It also provides Canadians with lower prices and increased choices for products related to their well-being.

Monitoring the biologic and biosimilar industry

27. In February 2019, the Bureau completed the investigation into allegations of abuse of dominance by Janssen Inc., a pharmaceutical company owned by Johnson & Johnson. The Bureau's investigation considered whether Janssen was engaging in conduct that shielded its biologic drug, Remicade, from competition from biosimilar drugs such as Inflectra and Renflexis. This included allegations of predatory pricing, as well as other conduct that could exclude or disadvantage biosimilar competitors.

28. While the Bureau concluded that there was no evidence to demonstrate Janssen's conduct had substantially lessened or prevented competition, it will continue to monitor the Canadian biologic and biosimilar industry closely to respond to developments that have the potential to disrupt competition in this critical sector of the economy. Although biosimilar drugs are relatively new in Canada, they are likely to play an important role in keeping health costs down in the future. Biosimilar drugs provide patients with safe and effective treatment options at prices often far lower than that of an original biologic. The Bureau will not hesitate to take appropriate action to maintain and promote competition in the pharmaceutical industry.

Investigating abuse of dominance in the pharmaceutical industry

29. When businesses set up roadblocks to prevent competitors from getting their products to market, the Bureau takes notice. In the pharmaceutical industry, this is critical because competition ultimately leads to more affordable drugs for Canadians.

¹ Canada's Economic Strategy Tables. (February 2018) "Health and Biosciences: The sector today and opportunities for tomorrow."

30. In December 2018, the Bureau closed the investigation into allegations of abuse of dominance by certain brand name drug manufacturers, including Celgene Inc., Pfizer Canada Inc. and Sanofi-Aventis Canada Inc. Policies and practices that were alleged to restrict generic drug manufacturers from accessing samples of brand name drugs were investigated. After a careful review of the facts, there were findings that there was insufficient evidence to demonstrate that competition had been substantially lessened or prevented. While the Bureau concluded this investigation, this type of alleged conduct may warrant further enforcement or advocacy action in the future.

2.1.4. Summary of activities of competition authority

Competition and innovation in the digital economy

2018-2019 key achievements	
Digital economy cases commenced	36
Digital economy cases ongoing	30
Digital economy cases concluded	24
Capacity-building initiatives related to digital economy	10

Compliance Promotion

2018-2019 key achievements	
Compliance presentations to public procurement agencies (federal, provincial, and municipal)	22
Compliance presentations to small and medium businesses	15
Compliance presentations to in-house counsel	1
Compliance presentations to trade associations	1

Health and Biosciences

2018-2019 key achievements	
Meetings with domestic and international agencies or regulators	19
Guidance documents posted	2

Transparency in Enforcement and Advocacy

2018-2019 key achievements	
Abuse of Dominance Guidelines published	Published the revised <i>Abuse of Dominance Guidelines</i> in March 2019.
Draft Market Studies Information Bulletin published	Published the final <i>Market Study Information Bulletin</i> in September 2018.
New volume of Deceptive Marketing Practices Digest published	Published Volume 4 of the <i>Deceptive Marketing Practices Digest</i> .
Revised IPEGs published	Published the revised <i>Intellectual Property Enforcement Guidelines</i> in March 2019.
Guidelines on merger efficiencies published	Published the <i>draft Merger Efficiencies Guide</i> .
Increase in of social media followings	Recorded a 15% increase for the 2018-19 fiscal year.

Forward-looking Advocacy

2018-2019 key achievements	
Market study notice published	The market study notice on Competition in Broadband Services was published in in May 2018.
Representations before regulatory bodies	Eight representations were made to regulatory bodies during 2018-19, including submissions to the Canadian Radio-Television and Communications Commission , the Broadcasting and Telecommunications Legislative Review Panel , and the British Columbia Legislative Assembly
Advocacy interventions	9
FinTech-focused interventions	17

Dialogue and Partnerships

2018-2019 key achievements	
Bilateral meetings with other government agencies	53
Meetings with new stakeholders	35

International Collaboration

2018-2019 key achievements	
Capacity-building initiatives	8
Staff exchanges	1
Seminars or workshops organized	27

Organizational excellence

2018-2019 key achievements	
Training or information sessions offered	56
Activities related to workplace wellness, Official Languages, and diversity and inclusiveness	40

2.1.5. Summary of activities of courts

31. In addition to the earlier referenced TREB ruling by the Supreme Court of Canada, the Bureau investigations led to \$1.3 million in fines and 5.9 million total settlements imposed in cartel cases.

2.1.6. Collaboration with partners

Strengthening domestic relationships

32. Fostering strong and collaborative relationships with the Bureau's domestic partners is essential to ensuring that Canadian businesses and consumers prosper in a competitive and innovative marketplace. Last year, the Bureau developed and strengthened partnerships with key domestic stakeholders. In total, 127 meetings with agencies and regulators, including Transport Canada, the Canadian Transportation Agency and Public Services and Procurement Canada, among others were held. Seven formal domestic partnerships were also signed, with the goal of raising awareness on competition issues and driving important conversations forward.

33. In April 2018, for instance, the Bureau signed an MOU with the Spectrum and Telecommunications Sector of Innovation, Science, and Economic Development Canada (ISED) to create a framework for cooperation so that both organizations can gain from each other's expertise. An Administrative Note on Communication with the Investment Review Division of ISED was also signed to increase transparency on the nature and scope of communications between the two groups.

Strengthening international relationships

34. Modern markets move quickly across borders, making it integral for us to work with the international counterparts to deliver on the Bureau's mandate. Strong, mutually beneficial partnerships allow us to advance shared competition goals and build awareness on key issues while also taking action against unlawful practices. This past year, the Bureau continued to participate actively in international workshops through international fora, strengthening global partnerships.

35. The Bureau co-organized a Competition Economics Workshop with the Organisation for Economic Co-operation and Development (OECD) and the International Competition Network (ICN). The workshop brought together Chief and Senior Economists from around the world to discuss emerging issues and share best practices. When working together with partners, the Bureau can share and collaborate on ways to achieve the best results.

36. In 2018-19, the Bureau actively participated in international workshops, strengthening the Bureau's global partnerships. This included the ICPEN, the Association of Southeast Asian Nations Sub-Regional Workshop on Big Data and Competition Law, the ICN Cartel Workshop, and the International Mass Marketing Fraud Working Group (IMMFWG). Formal meetings were held with our counterparts, such as the agencies of New Zealand, the United Kingdom (UK), and the European Union (EU), to work towards shared competition goals that cross borders. The Bureau had bilateral meetings with key stakeholders in Brazil, EU, New Zealand, UK, Mexico, US, Hong Kong, and Singapore. In October 2018, the Commissioner met with international counterparts in Mexico and the United States, discussing shared competition priorities, like big data and best practices in the digital economy.

Competition and gender

37. Over the past few years, the Government of Canada announced a broad priority for gender equality, and has taken many steps to examine issues through a gender lens. For example, Gender Based Analysis Plus (GBA+) is now mandatory for government policies and legislation in Canada. In 2018-19, the Bureau further researched competition and gender, to see if there were opportunities to promote gender equality with competition enforcement and policy.

38. In November 2018, the Bureau worked with the OECD to advance research on gender and competition, including a series of panels and forums. At the OECD's "March on Gender" event in recognition of International Women's Day, the Bureau facilitated a panel on Gender and Competition at the Conference on Gender Equality in Business. The Bureau will continue to create and support opportunities for further research in this area.

2.2. Mergers and acquisitions

39. Mergers can be a positive way to increase competitiveness throughout the Canadian economy. In those rare instances where transactions give rise to serious competition concerns, the Commissioner will take appropriate action to ensure that competition is preserved.

2.2.1. Statistics on number, size, and type of mergers notified and/or controlled under competition laws

40. In 2018-19, the Bureau completed 209 merger reviews, including 142 non-complex mergers and 67 complex mergers. The Bureau also reached 5 Consent Agreements registered with the Competition Tribunal.

2.2.2. Summary of significant cases

Protecting competition in the agriculture industry

41. In November 2018, the Bureau helped maintain competitive prices and product choice for farmers in Ontario, by reaching an agreement with La Coop fédérée (LCF), the largest agri-food enterprise in Quebec, with respect to its acquisition of Cargill Limited's Ontario grain business. The review concluded that within certain local areas of southwestern and central Ontario, the proposed transaction would likely substantially lessen competition in the retailing of crop inputs, and specifically fertilizers and crop protection products. As part of the agreement, LCF agreed to sell their retail stores in Alliston, Harrow, Tilbury, and Waterford.

Providing input on competition in the airline industry

42. Many communities in Northern Canada rely on air services due to the large geographic areas and limited road infrastructure in certain areas. These services play an important role in economic development, interconnectedness among communities, and the supply of food, healthcare and other goods and services. In February 2019, the Bureau issued a report to the Minister of Transport that outlined competition concerns regarding a merger between two Northern Canadian airlines: First Air and Canada North. The Bureau noted in the report that the effects of the transaction were likely to include reductions in passenger and cargo capacity, increases in price, and reductions in flight schedules. This was the first time that the Minister of Transport directed a public interest review of a proposed transaction involving a transportation undertaking. It also marked the first time that the Commissioner was required to provide such a report and subsequently an assessment of proposed undertakings to address his concerns.

Maintaining drugstore competition

43. In April 2018, the Bureau reached an agreement with METRO Inc. in regards to its acquisition of The Jean Coutu Group Inc. The agreement addressed competition concerns focused on pharmacy distribution and franchising services in certain local markets in Quebec. The Bureau's review found that the merger would have likely led to substantially higher prices or decreases in services for consumers related to the purchase of medications and other pharmacy products in eight regions in Quebec. As part of the agreement, Metro agreed to sell certain properties or lease to alternative distributors to preserve competition in the identified regions.

3. The role of competition authorities in the formation and implementation of other policies, e.g. regulatory reform, trade and industrial policies

44. Competition drives innovation, in turn enhancing productivity, increasing choice, and advancing cutting-edge technology. Unnecessary regulation can stifle innovation and slow Canada's economic growth. As Canada's competition experts, the Bureau's role is to provide forward-thinking advice to regulators and policy-makers to give innovation the fuel it needs to thrive.

3.1. Examining broadband internet services in Canada

45. Every day, Canadians rely on broadband services to connect with their peers, make purchases, or run their business. To foster competition in the telecommunications sector, the Bureau launched a market study to investigate consumer habits in purchasing internet services. The study focuses on the current state of competition in the Canadian broadband sector. In support of the market study, the Bureau launched a public consultation survey in October 2018 to learn about consumer habits in purchasing internet services, which received over 42,000 responses from Canadians. This feedback helps the Bureau detect certain trends and focus in on what matters most to Canadians.

46. Last spring, the Government of Canada expressed concerns on mobile phone service affordability. In response to these concerns, the Canadian Radio-television and Telecommunications Commission (CRTC) launched public consultations. The Bureau provided advice by writing five formal submissions to the CRTC, to support competition in telecommunications services for Canadians.

3.2. Shining a light on progress in the FinTech sector

47. In 2017, after an extensive 18-month study of the industry, the Bureau published its FinTech Market Study Report in which it made 30 recommendations to Canada's regulators and policy-makers. In September 2018, a progress report was released, which highlighted how regulators and policy-makers put some of the recommendations into practice.

48. In an effort to promote tech-led innovation in the financial service sector, the Bureau made submissions to other Canadian federal and provincial regulators, including the Department of Finance's consultation Reviewing Canada's Anti-Money Laundering and Anti-Terrorist Financing Regime, their consultation on the Merits of Open Banking, and to the British Columbia Securities Commission's Securities Law Framework for FinTech Regulation. The Bureau also appeared before the Senate Standing Committee on Banking, Trade and Commerce on the potential benefits and challenges of open banking for Canadian financial services consumers. It is clear that a real transformation is taking place, and the Bureau looks forward to seeing the evolution and growth of the FinTech sector.

3.3. Bringing competition into focus

49. In July 2018, the Bureau released "Bringing Competition into Focus", an advocacy piece examining regulations governing Canada's prescription eyewear industry and their impact on consumers' ability to get prescription eyewear online. In this edition, governments and regulators were called upon to ensure regulations are based on evidence and strictly necessary to address legitimate public policy concerns. Competition in the eyewear industry should not be harmed by overly restrictive rules.

3.4. Encouraging pro-competitive regulation

50. As part of British Columbia's liquor policy review, the Commissioner sent an open letter to regulators in British Columbia asking them to consider the principles of competition while reviewing their liquor policy. British Columbia's liquor policy is restrictive on hospitality retailers, which means private liquor distributors cannot sell their products to restaurants, bars and hotels. Hospitality retailers can only buy their alcohol products from government-owned stores at retail prices. This policy restricts competition: it raises prices and limits the selection of products. Allowing hospitality retailers to buy alcohol products from private distributors could help reduce their costs and lead to lower prices and more choices for consumers.

51. On another matter, the Bureau urged policy-makers in British Columbia to rethink and improve provincial taxi regulations by applying the principles of competition. In line with its report on Modernizing Regulation in the Canadian Taxi Industry, the Bureau encouraged B.C.'s Select Standing Committee on Crown Corporations to level the playing field for taxis and ride-sharing providers.

3.5. Compliance

52. Robust and healthy competition benefits everyone: consumers, businesses, and the economy as a whole. By increasing compliance with Canada's competition laws, the Bureau works to help prevent and address anti-competitive activity such as abuse of dominance, price-fixing, bid-rigging, mergers that stand to substantially lessen or prevent competition, and deceptive marketing practices.

53. Through outreach activities, the Bureau promotes competitive markets that work well for Canadians by providing businesses with valuable information to help them comply with Canada's competition laws.

54. By providing small- and medium-sized businesses with knowledge and tools to develop or strengthen their compliance programs, the Bureau helps prevent anti-competitive practices from taking place. In 2018-2019, there were 26 compliance outreach events.

3.5.1. Putting the digital economy in the spotlight

55. The Bureau's work increases trust in the digital marketplace by strengthening compliance with Canada's competition laws. A strong, competitive digital marketplace is essential to the well-being of Canadians and the affordability of products and services.

4. Resources of competition authorities

4.1. Resources overall (current numbers and change over previous year):

56. The Bureau's budget for 2018-2019 was \$52.6 million, including approximately \$15 million from user fees, compared to a budget of \$49.6 million, including approximately \$10 million from user fees in 2017-2018. Expenditures were \$52.7 million, consisting of \$35.5 million in salaries for 370 full-time equivalents (FTEs) and \$17.2 million in non-salary expenses. In comparison, expenditures for 2017-2018 were \$48.6 million, consisting of \$36.6 million in salaries for 361 FTEs and \$14 million in non-salary expenses.

4.1.1. Annual budget (in your currency and USD):

57. The Bureau's budget for 2018–19 was \$52.6 million (\$37.8 million USD).²

4.1.2. Number of employees (person-years):

58. In 2018-2019, approximately 370 full-time employees worked at the Bureau. In addition, approximately 30 employees from the Department of Justice and PPSC are dedicated to providing legal services to the Bureau. Most Bureau staff generally fill investigative and advocacy roles rather than economists and lawyer roles. The Bureau hires employees with a diversity of backgrounds, including individuals who have studied in economics and law. Specific information related to employees' university degrees is no longer tracked.

4.2. Human resources (person-years) applied to:

59. Approximately 234 employees are dedicated to competition enforcement. Approximately 50 employees work in the Mergers Directorate, 68 are in the Cartels Directorate, 31 in the Monopolistic Practices Directorate and the remaining competition enforcement employees fill other roles such as deceptive marketing, advocacy, international, electronic evidence gathering and analysis, etc.

4.3. Period covered by the above information:

60. The above information covers fiscal year 2018-2019.

4.4. Conclusion

61. The Bureau will continue to vigorously enforce and promote competition in sectors that have the greatest impact on the everyday lives of consumers and businesses. The Bureau's work over the last year addressed concerns in sectors that are important to Canadians – including the digital economy, infrastructure, telecommunications, agriculture, and airlines.

62. Hand-in-hand, competition and innovation are the keys to maintaining a dynamic and healthy economy that allows Canadians to enjoy increased choice, innovative products, and improved services.

² Based on the Bank of Canada CAD-USD exchange rate as of March 13, 2020.