Canada's Top 50 Research Universities List 2010
Analysis

Research Income Growth Slows

Canada's Top 50 Research Universities reported a 3.0% increase in combined research income in Fiscal 2009, down from 6.0% the previous year. Total research income rose to $6.24 billion in Fiscal 2009, compared with $6.06 billion in Fiscal 2008. The pace of income growth has slowed markedly from the high single and double-digit rises that were typical in the early part of the past decade.

Part of the decline this year resulted from hiatus in activity at the Canada Foundation for Innovation, which did not hold a major competition in Fiscal 2009. Also dragging down research income growth in Fiscal 2009 was a -27.7% drop in funding from Individuals, which came on the heels of a -20.4% decline the year before. In addition, income from Endowments/Investments fell by -6.6% between Fiscal 2008 and Fiscal 2009. Reduced donations by Individuals and less income from Endowments/Investments likely reflect the uncertain economic climate. Disappointingly, Corporate contributions grew by only 0.3%, compared with 10.3% in Fiscal 2008. On a positive note, Foreign sources expanded by 17.1% in Fiscal 2009, following a -22.8% decline the year prior.

The $100 Million Club Holds Firm

Seventeen universities gained $100 Million Club status, each recording research income of $100 million or more, accounting for 85% of total Top 50 research income in Fiscal 2009. Most Club members have medical schools and affiliated research hospitals or health authorities, which attract considerable amounts of research support. However, 3 institutions (University of Waterloo, University of Guelph and University of Victoria) achieved Club status without the benefit of medical schools or research hospitals/health authorities. Overall, 13 Club members saw their research income grow, while 4 others saw a decline.

The $100 Million Club		
2009 Rank	**University**	**Research Income $000**
1	University of Toronto*	$858,182
2	University of British Columbia*	$524,569
3	University of Alberta*	$507,613
4	Université de Montréal*	$486,179
5	McGill University*	$432,118
6	McMaster University*	$377,732
7	Université Laval*	$282,657
8	University of Calgary*	$264,358
9	University of Western Ontario*	$241,700
10	University of Ottawa*	$236,977
11	Queen's University*	$178,180
12	University of Manitoba*	$172,067
13	University of Saskatchewan*	$169,450
14	University of Waterloo	$157,152
15	University of Guelph	$154,850
16	Dalhousie University*	$125,689
17	University of Victoria	$104,812

*Has a medical school

Mixed Provincial Performance

On a provincial basis, research income gains in Fiscal 2009 were strongest in New Brunswick, where the province's 2 universities expanded their combined income by 10.8%. The other provinces where reported research income growth exceeded the national average income increase of 3.0% were: Manitoba (7.3%), British Columbia (6.6%), Alberta (5.8%) and Newfoundland (5.2%).

Provincial shares of total research income were largely unchanged, but Alberta's 3 Top 50 institutions increased their portion in Fiscal 2009 to 13% of the total up from 12% in Fiscal 2008, as did British Columbia moving from 11% of total Top 50 research income in Fiscal 2008 to 12% of total income in Fiscal 2009.

Top 50 –Leading Provinces	
Province	**% of Total**
Ontario (19)	40
Quebec (12)	25
Alberta (3)	13
British Columbia (4)	12

Gainers and Losers

Twenty-eight of the Top 50 universities recorded increases in their research income in Fiscal 2009 that exceeded the national average of 3.0%. The top gainers were led by OCAD University (2,317.5%), University of Ontario Institute of Technology (57.0%) and University of Winnipeg (38.2%). Other universities that also made impressive gains in Fiscal 2009 included University of

Windsor (26.7%), Université du Québec à Rimouski (23.3%) and Université du Québec à Trois-Rivières (21.0%).

Top 10 Universities by Growth			
2009 Rank			
Income Growth	Overall	University	% Change 2008-2009
1	46	OCAD University+	2,317.5
2	48	University of Ontario Institute of Technology+	57.0
3	50	University of Winnipeg	38.2
4	27	University of Windsor	26.7
5	36	Université du Québec à Rimouski	23.3
6	34	Université du Québec à Trois-Rivières	21.0
7	14	University of Waterloo	16.3
8	44	Nova Scotia Agricultural College+	16.0
9	45	Université de Moncton	15.1
10	40	Université du Québec en Abitibi-Témiscamingue	13.4

+Not a full-service university

For a number of other universities, Fiscal 2009 research income growth results were disappointing.

Bottom 10 Universities by Growth			
2009 Rank			
Income Growth	Overall	University	% Change 2008-2009
1	41	Trent University	-22.1
2	49	Saint Mary's University	-19.0
3	43	St. Francis Xavier University	-16.8
4	13	University of Saskatchewan*	-16.8
5	20	Carleton University	-13.4
6	23	Université du Québec à Montréal	-9.3
7	11	Queen's University*	-7.4
8	17	University of Victoria	-6.8
9	42	Brock University	-4.9
10	37	University of Lethbridge	-4.4

*Has a medical school
Apparent ties due to rounding

Small Increase in Research Intensity

Slowing overall research income growth (3.0%), combined with a slight rise in full-time faculty numbers produced a tepid 1.4% increase in research intensity (research income per full-time faculty position) in Fiscal 2009. On average, each university attracted $167,200 of research income per full-time faculty position, compared with $164,800 the year before. While University of Toronto maintained its leadership position attracting $351,000 per full-time faculty position, McMaster University ($309,400) and University of Alberta ($308,800) had solid claims on second and third place respectively.

Top 10 Research Intensive Universities+			
2009 Rank			Research Intensity ($ per full-time faculty) $000
Research Intensity	Overall	University	
1	1	University of Toronto*	$351.0
2	6	McMaster University*	$309.4
3	3	University of Alberta*	$308.8
4	5	McGill University*	$269.2
5	4	Université de Montréal*	$257.2
6	2	University of British Columbia*	$236.9
7	11	Queen's University*	$218.4
8	7	Université Laval*	$211.7
9	10	University of Ottawa*	$194.1
10	15	University of Guelph	$192.6

+Includes full-service institutions only
*Has a medical school

Tier Shares Unchanged

Sixteen Medical/Doctoral universities accounted for 81% of total research income in Fiscal 2009, the same share as in Fiscal 2008. Also unchanged were the shares of the 12 Comprehensive institutions (14% of total research income) and the 22 Undergraduate universities (5% of the total). Interestingly, the Undergraduate institutions posted an impressive 7.8% gain in research income between Fiscal 2008 and Fiscal 2009, compared with a 2.7% increase by Medical/Doctoral universities and 2.6% by Comprehensive institutions.

Research Universities of the Year

RE$EARCH Infosource once again shines the spotlight on 3 *Research Universities of the Year* – the leading institutions that excel on a balanced scorecard of research input and output/impact indicators.

This year's winners were: University of Toronto in the Medical/Doctoral category, University of Waterloo in the Comprehensive category and University of Northern British Columbia in the Undergraduate category.

Spotlight - Decade in Review

RE$EARCH Infosource presents a special feature, *Decade in Review* that shines the spotlight on three key metrics over the past decade.

Kudos for first place winners for *Research Income Growth (1999-2009)* went to McMaster University (339.7%) in the Medical/Doctoral category, University of Victoria (364.6%) in the Comprehensive category and University of Prince Edward Island (432.0%) in the Undergraduate

category. The first place winners for *Research Intensity Growth (1999-2009)* were Université Laval (219.6%) in the Medical/Doctoral category, University of Victoria (287.9%) in the Comprehensive category and University of Prince Edward Island (324.2%) in the Undergraduate category. Finally, the first place winners for *Research Publication Growth (1999-2008)* were University of Calgary (90.6%) in the Medical/Doctoral category, Simon Fraser University (104.9%) in the Comprehensive category and Ryerson University (379.4%) in the Undergraduate category.

This Year and Next

The "golden age" of university research funding is coming to an end. The spectacular gains in research income from Fiscal 1999 to Fiscal 2009 (see *Decade in Review, page 6*) are no longer in the cards as all funders come to grips with a perilous economy. Research income growth slowed to 3.0% in Fiscal 2009 from 6.0% the previous year. In a best case scenario the "new normal" will be research income growth that keeps pace with inflation.

Government sources accounted for 68% of all Top 50 research income received by Canadian universities in Fiscal 2009, down slightly from 69% the previous year. Government income increased by 2.6%, compared with a 3.0% overall research income growth. Part of this softening reflects the absence of a major funding competition from the Canada Foundation for Innovation (which attracts matching contributions from provincial governments and others). But another part reflects the fiscal realities facing the federal and provincial governments. Even with the best of intentions governments will be severely constrained in their ability to further expand the country's academic research base. As time goes on many of the infrastructure investments made in the 2000s will reach the end of their useful life and available resources will need to be directed to replacement rather than expansion.

Whereas Government investments in research can be somewhat isolated from the annual vicissitudes of the economy (through borrowing), that is not the case for the important Non-Government funding sector. These sources – including Corporate, Not-for-Profit, Individual and Endowments/investment - had been growing rapidly until recently, buoyed by a rising economic tide. Now that the tide is receding, many components of Non-Government income are falling.

It is hard to avoid the conclusion that the years to come will see some belt-tightening in the research community. But at the same time the need has never been greater for the academic research community to drive economic growth.

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