



NORTHERN ECONOMIC AND LABOUR MARKET TRENDS REPORT

November 2016



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1.0 EXECUTIVE SUMMARY

The purpose of the Northern Economic and Labour Market Trends report is to provide an update to statistical information about the economy and workforce of Northern Saskatchewan. It has been created at the request of the Ministry of Economy and is intended to fill an information gap that has been present since the publication of the last Northern Training Needs Assessment in 2011-12.

This report looks at the population, education, employment, and economy of Northern Saskatchewan. It also provides some comparisons between our region and the three Canadian northern territories – areas with similar demographics and geography. Economic development initiatives in the three territories are examined in order to provide examples for consideration as we move forward.

The report makes observations about education and training as well as general observations about overall economic development. These observations are based on the statistics for occupational demand and economic growth provided.

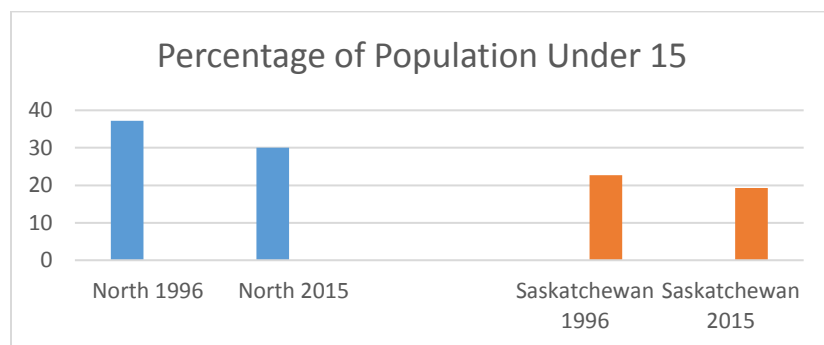
The hope is that this document will be useful for planning and discussion purposes by northern communities, educational institutions, industry, and government. Business owners and workers will also find the information useful as they plan strategies and career moves. This Executive Summary provides a snapshot of the content of the report.



Our population is still young and growing, but the demographics are changing. Between 2010 and 2015 we grew from 35,819 residents to 39,212 – a rate of 9.5%. During the same period, the Saskatchewan population grew 7.8%.

In the longer term, however, our percentage of youth population is decreasing while the percentage of elders is increasing. Figure ES 1 shows that the percentage of youth in our population has declined from 37.2% to 30%. We still have a higher percentage of youth than Saskatchewan at 19.3%.

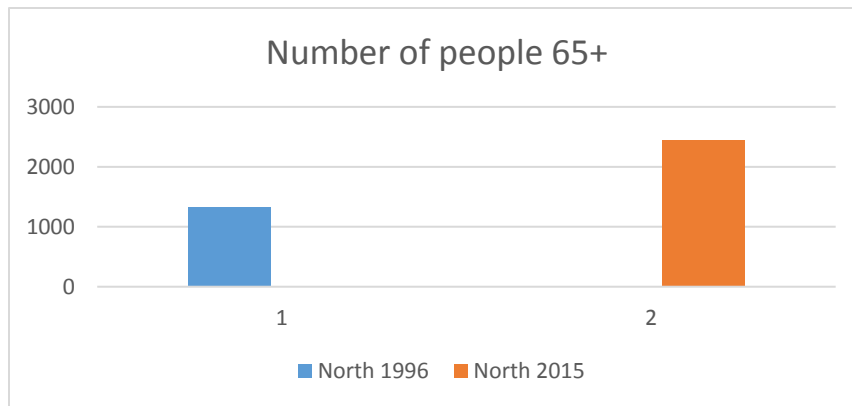
Figure ES 1



Source: Saskatchewan Covered Population 2015, Prepared by PHU, Jan 2016; prepared by KCDC 2016

At the same time as youth make up a large proportion of our population, the percentage and number of elders in our population is growing as well. Figure ES 2 shows we had 1,320 people 65 and over in 1996 and in 2015 had 2,448 - a growth of 1,128 – almost double the number of people 65 and over. In terms of percentage of population, the north's people 65 and over grew by 2 full percentage points, while Saskatchewan's grew by 0.1.

Figure ES 2



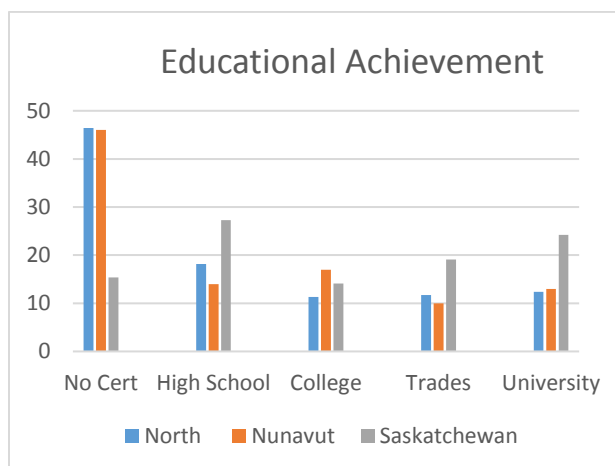
Source: Saskatchewan Covered Population 2015, Prepared by PHU, Jan 2016; prepared by KCDC 2016

The high proportion of youth in our population gives us challenges in terms of expanding education and training to meet the growing numbers, and creating economic growth that can keep up with the youth entering the workforce. The increasing number of seniors means that we must also be aware of the need for health services and living supports required for this group.

We have over 80% Indigenous population. Only 2 other regions in Canada have as high an indigenous population as N SK. These regions are Nunavut and Nunavik, QC. Indigenous people in our regions are primarily First Nation or Metis. Various services for First Nation, Metis, and non-Indigenous groups are offered through separate entities, which can complicate communication and jurisdictional responsibilities. These factors can make economic growth more difficult in numerous industrial sectors.

It is a relatively well known fact that our **education levels are lower than those in Saskatchewan.** A higher proportion of our population has no certificate, and we have a lower percentage of high school, college, and university grads. The N SK educational profile more closely resembles that of Nunavut than Saskatchewan as illustrated by figure ES 3 below.

Figure ES 3



Source: Statistics Canada 2011 NHS Health profile Catalogue no. 82-288-XWE, prepared by PHU, 2014; Conference Board of Canada – Education and Skills in the Territories, September, 2014. Prepared by KCDC, 2016

Lower educational levels are linked to lower employment and incomes. In N SK, this means that residents do not have the qualifications to fill some of the employment opportunities that come available. It also means that residents have less mobility in terms of seeking and finding employment outside the region.

However, education is not the sole reason northerners have less employment and income than residents of other Canadian regions. Figure ES 4 compares employment rates in Canada, Saskatchewan, and Nunavut. As expected, Saskatchewan and Canada have higher employment rates than N SK. However, Nunavut, with basically the same educational profile as our region, has a substantially higher employment rate at 55.8% of the workforce compared to N SK at 38.4%. Figure ES 5 compares incomes, and shows that Canada, Saskatchewan, and Nunavut all have higher median incomes than N SK. Nunavut's is \$28,580 while ours is \$16,860.

Figure ES 4

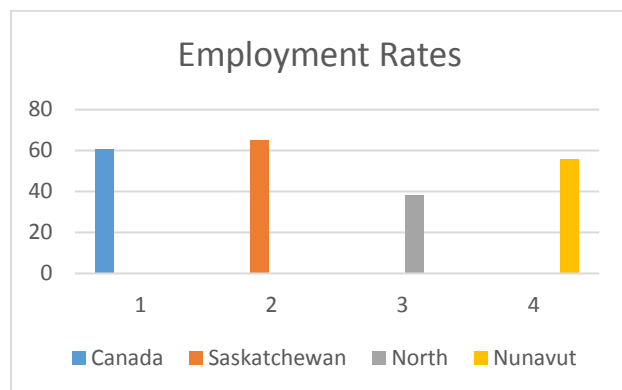
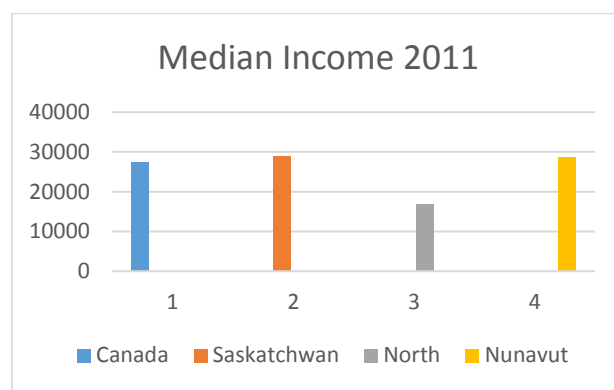


Figure ES 5

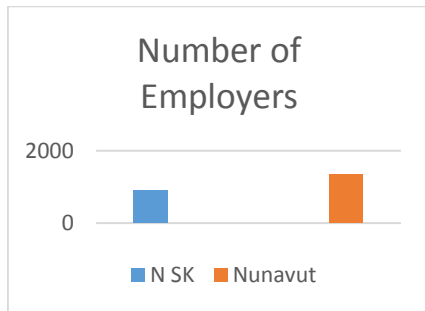


Source: Statistics Canada 2011 NHS Profile Catalogue no. 82-288-XW6, prepared by PHU, May 2014; Source: Statistics Canada, Income Statistics Division, Special Tabulations. Prepared by PHU, Dec 2015 Div 18 used as NorthSK; Nunavut Annual Labour Force StatsUpdate 2011, Nunavut Bureau of Statistics, Oct 15, 2015; Prepared by PHU, Dec 2015 Div 18 used as NorthSK; Nunavut Annual Labour Force StatsUpdate 2011, Nunavut Bureau of Statistics, Feb 2012, Prepared by KCDC 2016

Given that education rates are similar in Nunavut and N SK, yet employment rates and income are quite different, what other factors besides education effect northerners' ability to be employed? Answers can be found in analyzing the economy of our region and comparing it to others.

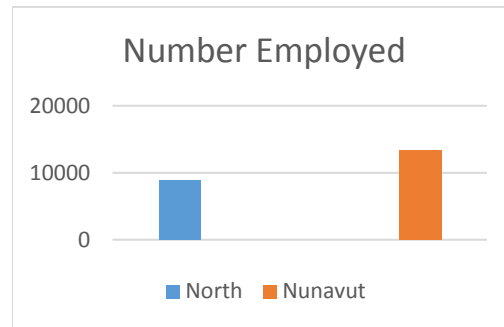
One way of looking at the economy is by comparing the number of establishments or potential employers in a region. Numbers of employers can translate roughly to job opportunities. When comparing N SK (population 39,212) to Nunavut (population 36,500), we see that we have a **lower number of employers** (902 in N SK and 1,351 in Nunavut) as shown in Figure ES 6.

Figure ES 6



Source: Sask Trends Monitor from Statistics Canada data June 2016; prepared by KCDC 2016

Figure ES 7

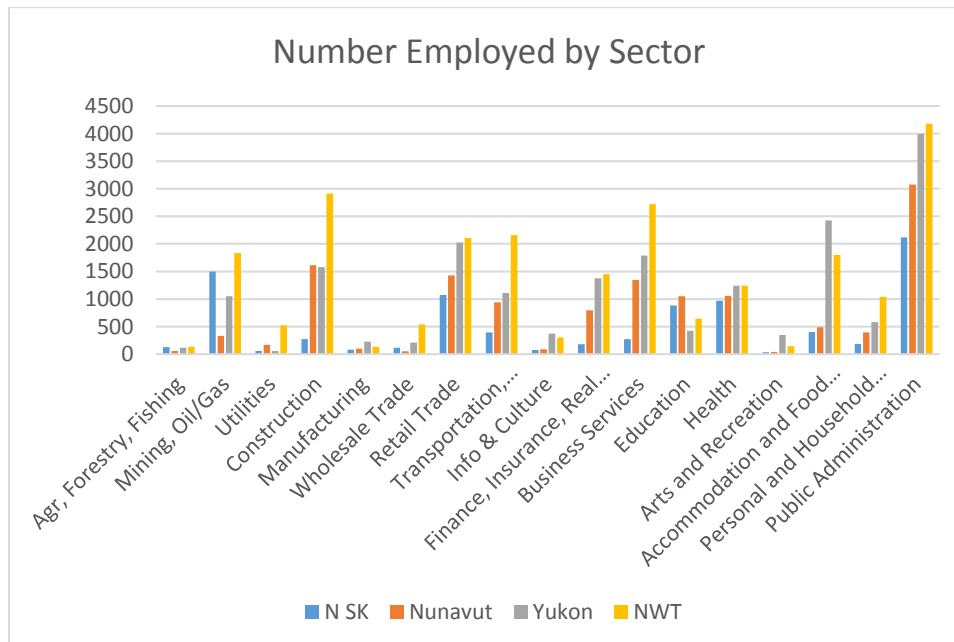


Source – Employment data - Sask Trends Monitor from Stats Canada Data, Population data – Sask Covered population, Prepared by PHU, Stats Canada, Note population data are for 2015, employment data are for June 2016, Prepared by KCDC 2016

The actual number of people working in Nunavut is greater than in N SK. Figure ES 7 show that Nunavut has an estimated 13,000 people working while N SK has an estimated 9,000. We have a **lower number of people employed**.

Why is the N SK economy smaller than that of other regions with similar populations? On comparing economic sectors, we find that N SK has sectors that are relatively underdeveloped compared with the three northern territories as shown in Figure ES 8.

Figure ES 8



Source – Sask Trends Monitor from Stats Canada Data June 2016, Prepared by KCDC 2016

While we have **greater employment in Mining than Nunavut and that similar to Yukon**, the only other sectors in which we have comparable employment are in the government funded sectors of Education

and Health. **All other sectors are lower**, most notably Construction; Finance, Insurance, and Real Estate; Business Services; Accommodation and Food Services; and Public Administration.

In comparing economies of N SK to the three northern Territories, it is important to note that each Territory is a Federal jurisdiction, with associated funding from the Federal government. The enhanced levels of funding are most likely reflected by the larger numbers of employees in Public Administration. In addition to more activity in the Public Sector in the territories, distance is a factor. Employees in the sector can service N SK from outside the region while territorial government residency policies and distance make this practice more difficult in the territories. In the Yukon, NWT, and Nunavut wages paid to Public Sector employees would then be spent in other sectors raising the levels of activity in Retail Trade; Business Services; and Finance, Insurance, and Real Estate.

Although not captured in Figure ES 8 which only indicates the occupations of people living in N SK, **our economy overall is affected negatively by the drain of money to other regions**. We lose the value of the jobs in mining that are held by people who live outside our region. We also lose the value of money spent on goods and services obtained from other regions by northern individuals or companies. In addition we lose the value of the wages and business purchases of northern companies forced by necessity to locate offices and personnel outside the region for efficiency and proximity to decision makers and markets.

Capital investment in N SK was at a low level in June 2016 when the data were gathered. There has been **little recent capital investment in the region**, which means **construction projects are few**. This can be seen in the low number of construction employees. To a large extent, **the current low capital expenditure is reflective of the low price of N SK's primary commodity: uranium**. The small number of workers in construction during a slow period for mining also indicates a low activity level in other sectors which could attract investment and drive construction.

To a large extent, **the N SK economy is reflective of the efforts made in economic development over the last 35+ years**. Since the discovery of the high grade uranium deposits the **primary focus has been on building human resource and business capacity to meet the needs of the Mining sector**. This focus has been correct and effective: northern workers have been successful in securing positions at the northern sites, and northern owned businesses provide a large portion of the services to the operations. Inadvertently, **this success also enabled the slow erosion of development efforts** and supports in other sectors. Consequently, relatively little was done to support growth in small sectors such as wild rice and value added forestry. **Our current economic profile with relatively strong activity in only Mining, Education, and Health reflects this history**.

The occupations at which we are employed in N SK reflect the active sectors. **Jobs related to Education, Health, and Mining dominate our workforce**. Professions that require residency in the community in which one works are well represented while those that can work in the north but reside elsewhere are not. Following is the list of the top 10 occupations in N SK with numbers employed in 2011.

Figure ES 9

Occupation	# Working	Rank
Elementary and Secondary Teachers, College Instructors, Early Childhood Educators, Other Instructors	1215	1
Light Duty Cleaners and Janitors	590	2
Underground Miners and Drillers and Mine and Drill Labourers	445	3
Accounting Technicians, General Office Support, Reception, Data Entry, Accounting Clerks, Payroll Clerks, Library, Shipper/Receiver, Dispatcher	430	4
Retail Sales	410	5
Teacher Assistants	260	6
Heavy Equipment Operators	220	7
Construction Trades Helpers and Labourers, Public Works Labourers	210	8
Registered Nurses	205	9
Process Operators, Power Engineers, Processing Labourers	200	10

Source - Sask Trends Monitor from NHS Table 99-012-X2011051; Prepared by KCDC, 2016

Note – actual numbers employed today will be affected by hiring and layoffs since 2011.

Projections can be made for future vacancies in occupations based on the number of people employed by multiplying that number by the Replacement Rate (number of people who retire). In Saskatchewan, the average rate is 2.4% per year. In addition, labour required by major projects can be added. Using that formula, and considering that no major projects are projecting a need for teachers, we can estimate that approximately 145 new Teachers will be required over the next 5 years in N SK. **Section 2.4 of this report provides vacancy projections for the major occupations in our region, and Section 2.41 provides observations related to training.**

It should be noted that some activities related to the N SK economy are not recognized by the standard statistic capture practices. **Sustenance activities such as hunting and fishing to put food on the table are not tracked**, and work for cash payment such as mushroom picking may not be included either. There is a value to these practices that needs to be considered as we recognize that any contribution to our economy is a benefit.

Notwithstanding these activities however, lower education levels and our underdeveloped economy give N SK a double challenge: training residents to access jobs, and developing the economy to create new jobs.

Our high youth population makes overall growth challenging. Calculating youth entering the workforce at 600 per year against retirement at 240 per year, we will have to create 360 new jobs or export that many workers just to keep at our current rate of employment. If we want to achieve the same employment rate as the rest of Saskatchewan over 10 years, we would need to add an additional 700 jobs per year. In total **we need to add around 1000 jobs per year, export that many workers, or a combination of the two.**

It would make sense to **strengthen and grow the regional economy** while at the same time providing **training that will qualify northerners for work both inside and outside the region.** To ensure the best

chance of success, a **strategic approach** is warranted. Two linked strategies may work best: one for economic development, and one for human resource development.

Examples of **approaches to strategic economic development** in similar regions can be found in the 3 northern territories. Common elements in strategy development include:

- using an approach that identifies sectors targeted for growth and initiatives within
- efforts to attract private sector investment as a major driver of economic growth
- government interventions and support for targeted sectors through programs or tax incentives
- territorial plans refined at the community level by local input
- outcomes and indicators defined

It is harder to find examples of **strategic human resource development** that focus on preparation for employment both within and outside a region. In addition, issues of northern residents' mobility and willingness to relocate must be taken into consideration. More research is needed, but initially it appears that elements of strategic human resource development could be:

- analysis of numbers entering workforce
- analysis of northern, provincial, and national labour requirements
- targeting promotion of careers in demand occupations
- development of marketing strategies for northern workers
- northern plan refined at local level by local input
- outcomes and indicators defined

Government assistance at the federal or provincial level does not need to be extensive to develop strategies and take action. It would not benefit the region for residents to wait for these levels of government to initiate the development, although their involvement would be welcome.

The Northern Labour Market Committee (NLMC) may have the reach necessary for strategy development. The structure of the NLMC with its sector sub committees could work very well for the creation of economic and human resource development strategies. The NLMC open membership structure could involve the necessary groups such as local government, business, industry, education, and service agencies.

Today, although our major economic sector, Mining, is in slowdown there are many examples of initiatives that are benefitting our economy. These examples are present both in the development of the northern economy and in the export of northern workers. Three of the initiatives are: development of the Ile a la Crosse and Wollaston fishing industries and reintroduction of local processing; and Kitsaki Projects Ltd. contracting to do powerline work outside N SK and using northern workers.

Development of human resource and economic strategies could encourage more such projects. The overall goal of the strategies would be to create enough cumulative activity to positively affect the employment rate and income of northern residents. As we **build strategic sectors and give residents the skills they need to be successful**, we should be able to see over time a growing economy and more opportunity for northern residents.

2.0 DEMOGRAPHICS

2.1 Population

Figure 1 – N SK Population 2010

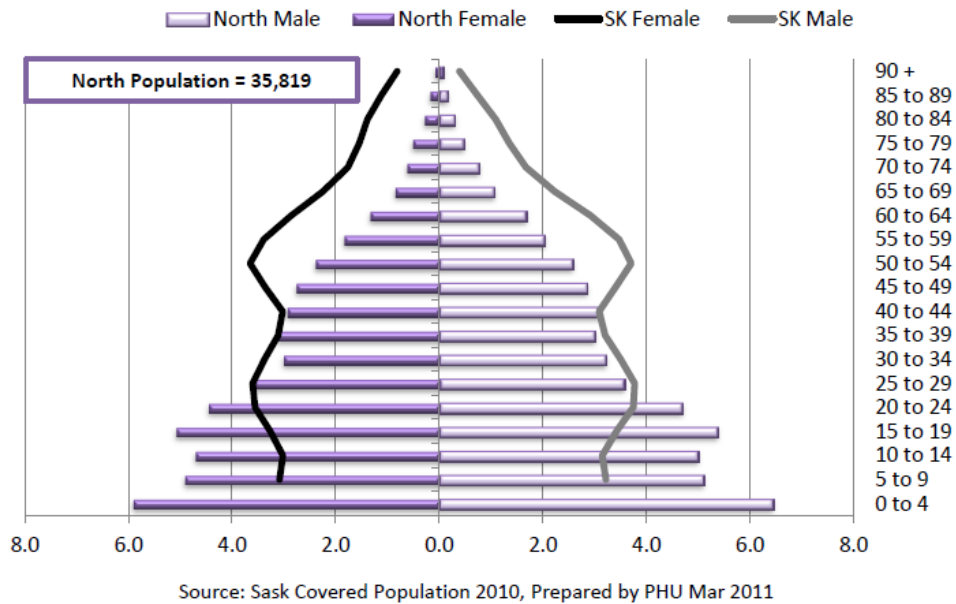
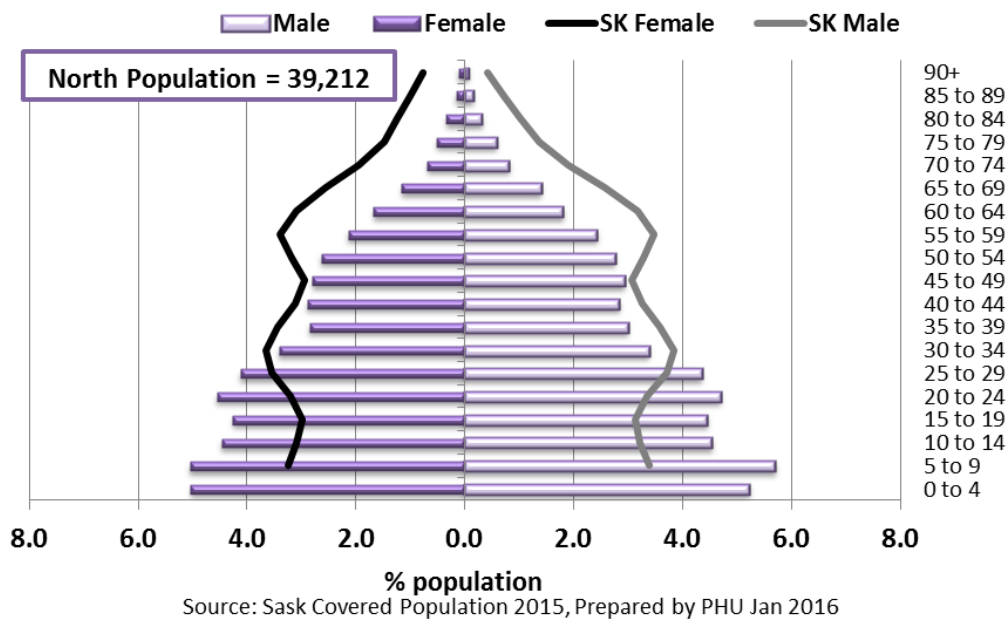


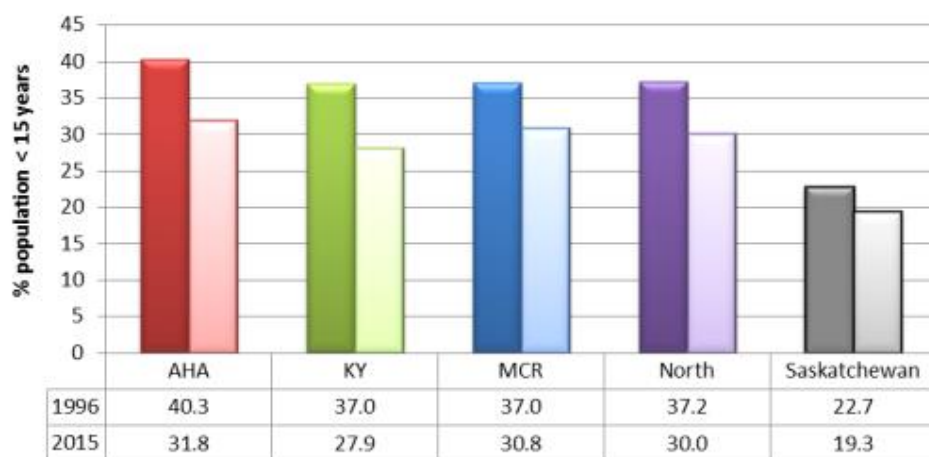
Figure 2 – N SK Population, 2015



The charts show a N SK population growth rate of 9.5% over 5 years. In same period, SK population grew 7.8%. The north's population growth is still primarily through new births rather than migration, although the birth rate is slowing.

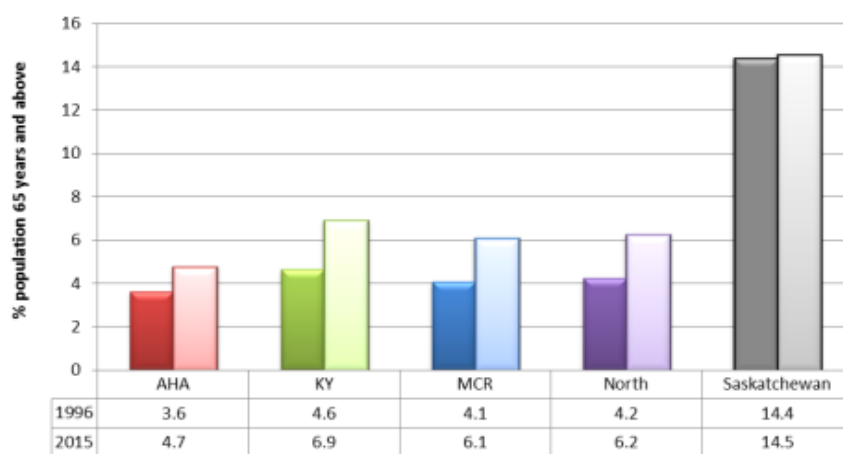
The the N. SK population is getting older. The “population pyramid” in figure 2 is somewhat taller with a narrower base than in figure 1, although overall, the population is still much younger than that of SK as a whole. The percentage of youth in our population has declined from 37.2% to 30%. We still have a higher percentage of youth than Saskatchewan which is at 19.3%.

Figure 3 - % of Population under 15 – N SK



Source: SK covered Population 2015, Prepared by PHU Jan 2016

Figure 4 - % of Population 65 and over – N SK



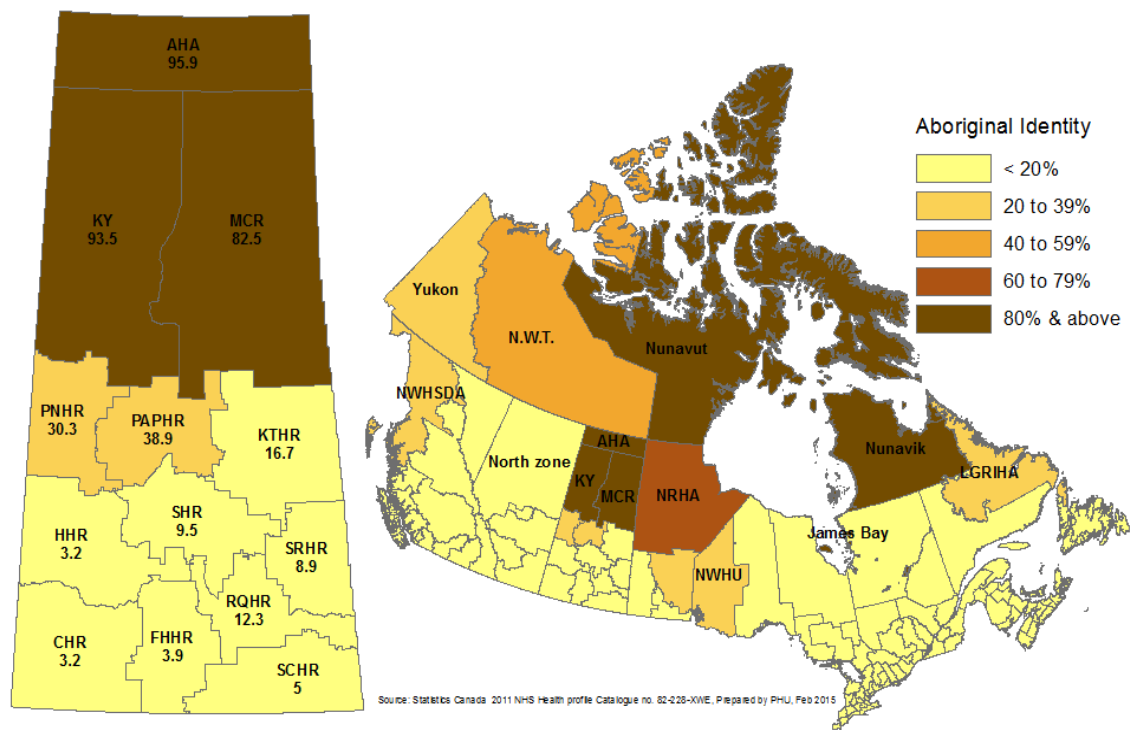
Source: SK covered Population 2015, Prepared by PHU Jan 2016

Figures 3 and 4 show the decline in the percentage of population under 15 and the increase of the population 65 and over. The proportion over 65 has grown by 2 percentage points since 1996 in N. SK compared to a 0.1 percentage point increase in SK.

The high proportion of youth in the N SK population provides challenges in education and employment. Educationally, we need a system that is larger in proportion to our population than that in the rest of the province. In terms of employment, the economy needs to grow at a very fast rate in order to provide enough jobs for the youth as they enter the workforce.

The growing senior population means that services for this age group, in particular Health Services, need to be expanded.

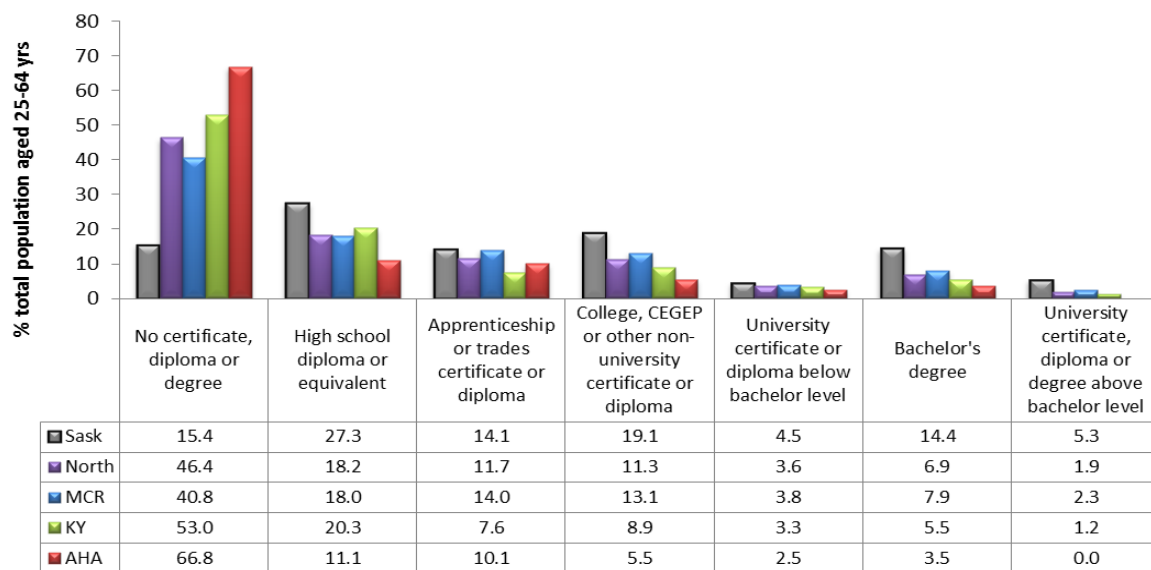
Figure 5 – Indigenous Population



N SK is among the regions in Canada with the highest proportion of Indigenous residents. Only the Territory of Nunavut and the Nunavik region in Quebec have equally high proportions. In our region, the Indigenous population is primarily First Nation and Metis. Various services for First Nation, Metis, and non-Indigenous groups are offered through separate entities, which can complicate communication and jurisdictional responsibilities. These factors can make economic growth more difficult in numerous industrial sectors.

2.2 Education

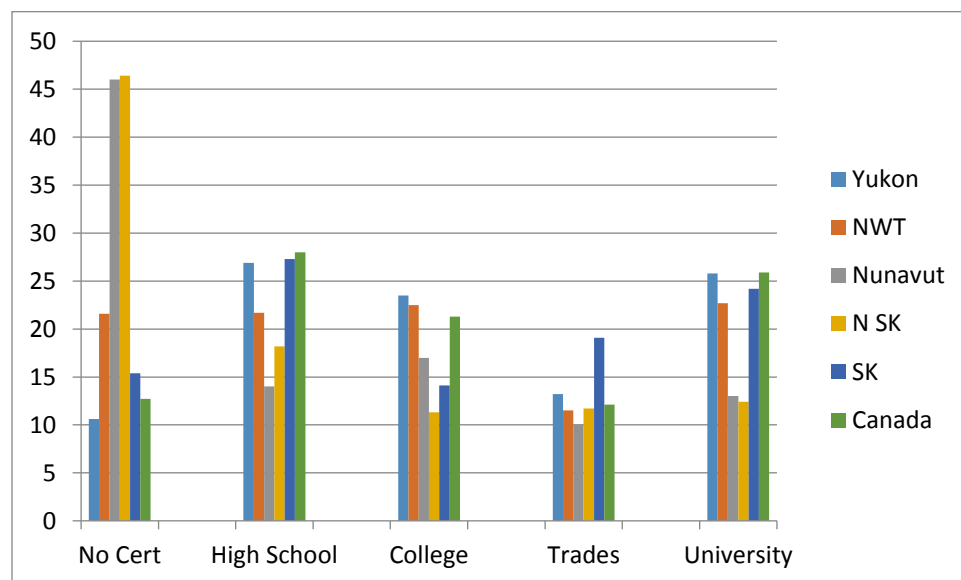
Figure 6 - Education Levels of Population aged 25 – 64, 2011 – N SK



Source: Statistics Canada 2011 NHS Health profile Catalogue no. 82-228-XWE, Prepared by PHU, May 2014

N SK lags behind the general population of Saskatchewan in educational attainment as shown in Figure 7.

Figure 7 – Education Levels of Population aged 25 – 64, 2011 – Select Regions



Sources: Statistics Canada 2011 NHS Health profile Catalogue no. 82-228-XWE, prepared by PHU, 2014; Conference Board of Canada – Education and Skills in the Territories, September, 2014. Prepared by KCDC, 2016

Education levels in N SK are roughly comparable to those in Nunavut. Both regions have about 46% of the adult population 25 to 64 years of age with no diploma, certificate, or degree. Our region has a higher percentage of high school completers (18.2%) compared to Nunavut (14%), has roughly the same

percentage of apprenticeship completers (11.7% N SK, 10% Nunavut), and a similar percentage of university educated population (12.4% N SK, 13% Nunavut). We have a lower percentage of people with College diplomas at 11.3% compared to Nunavut at 17%.

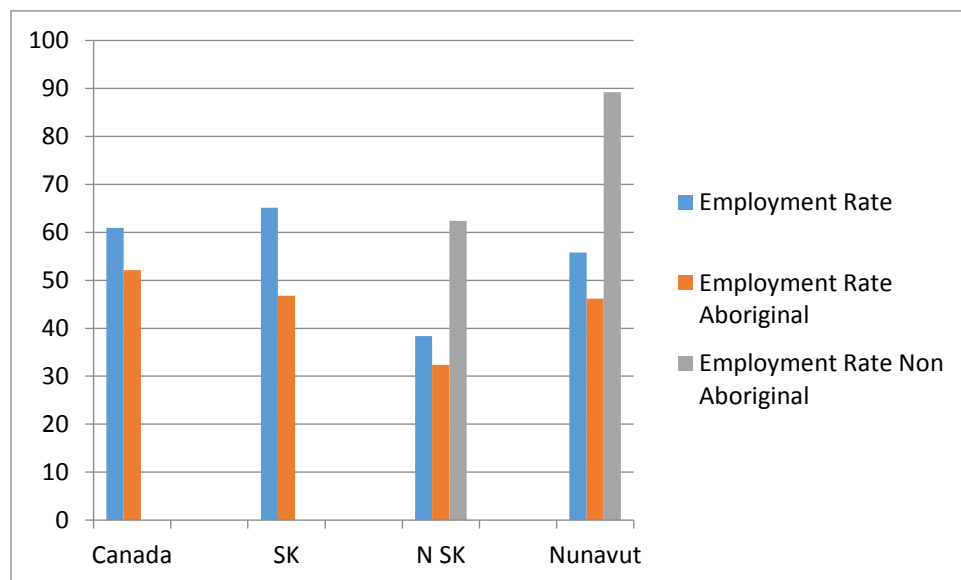
When compared with the Yukon, NWT, SK, and Canada as a whole; N SK and Nunavut have significantly lower educational achievement. Implications for people with lower education are that they are qualified for fewer jobs. This limits their choices at home as well as their ability to move and find employment elsewhere.

2.3 Employment

The employment rate in N SK at 38.4% is substantially lower than that in the rest of the province (65.1%) and Canada (60.9%). It is also lower than Nunavut which is at 55.8%. The N SK Aboriginal employment rate at 32.4 % is also lower than other that of other regions (SK – 46.8%, Canada 52.1%, and Nunavut 46.2%). Non Aboriginal employment rates in N SK and Nunavut are substantially higher at 62.4% and 89.2% respectively. Figure 8 shows illustrates these employment rates.

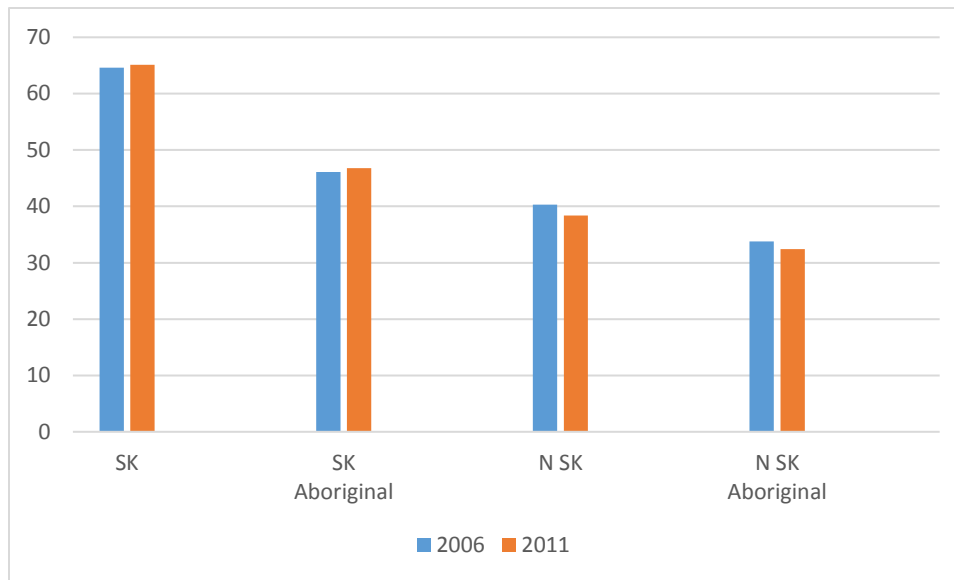
The higher employment rate in Nunavut, which has a similar educational profile to N SK indicates that while low education is a factor in N SK employment, it is not the sole reason for low employment in our region.

Figure 8 – Employment Rates, 2011



Source: Statistics Canada 2011 NHS Catalogue np 99-014-X2011016 and 99-011-X20111007. Prepared by PHU, Dec 2015 Div 18 used as NorthSK; Nunavut Annual Labour Force StatsUpdate 2011, Nunavut Bureau of Statistics, Feb 2012, Prepared by KCDC 2016

Figure 9 – Employment Rates 2006 and 2011

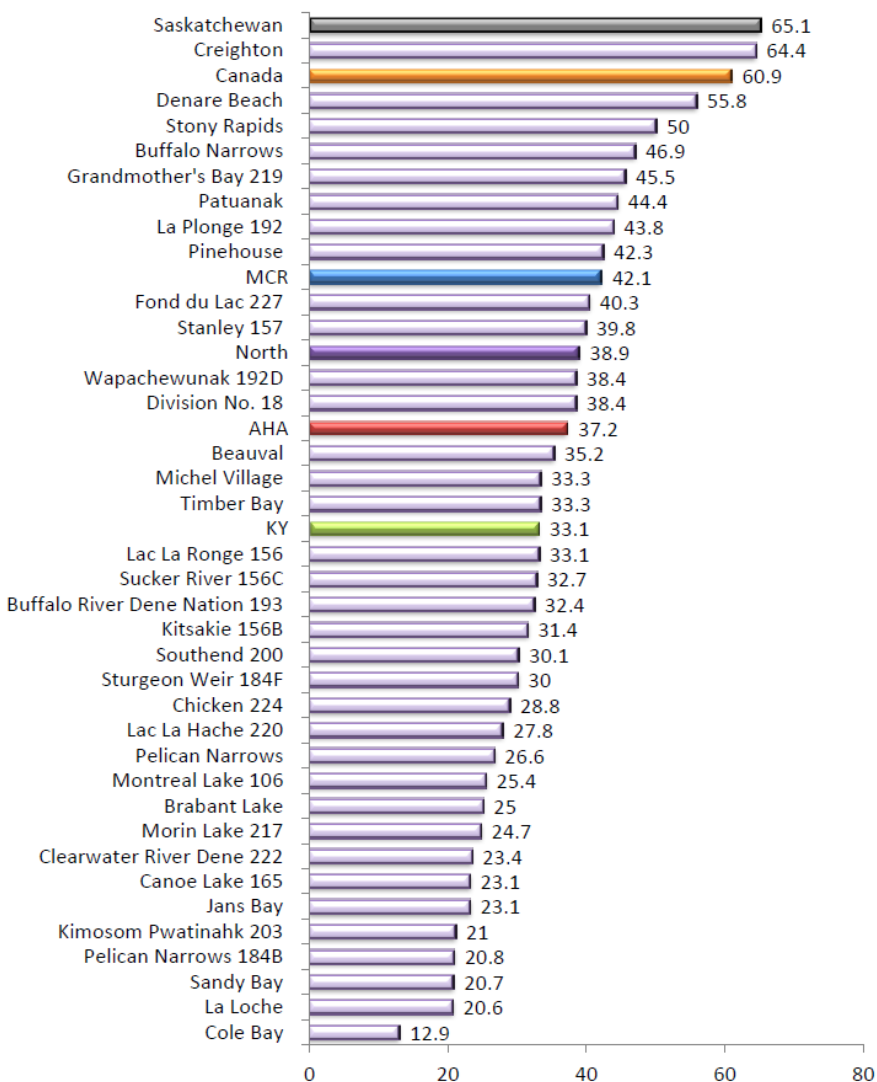


Sources – 2006 Census, prepared by PHU, Statistics Canada NHS Health profile Catalogue no. 82-228-XWE, prepared by PHU, Prepared by KCDC 2016

The employment rates in N SK declined between 2006 and 2011. The rate for the general N SK workforce declined from 40.3% in 2006 to 38.4% in 2011, while the rate for N SK Aboriginal employment declined from 33.8% to 32.4%. During the same period, the employment rate for all of SK rose from 64.6% to 65.1% and the rate for SK Aboriginal employment rose from 46.1% to 46.8%.

The decline in employment rate does not mean that the number of jobs declined in N SK. It is quite likely that the number of jobs increased, but that the numbers of people entering the workforce increased even faster. Due to our young population profile, N SK has high a number of young people entering the workforce each year relative to our overall population.

Figure 10- Employment Rate, Population aged 15 and over, by Community, 2011



Source – Statistics Canada 2011 NHS Health Profile no 82-228-XWE & 2011 NHS Profile 99-014-X2011016, Prepared by PHU, Dec 2014

Figure 11 shows that the employment rate varies widely between communities in N SK. Creighton at 64.4% is close to that of SK as a whole, while other communities are at or below 25% employment. More research is needed to identify the reasons for these differences in employment rate at the community level.

2.4 Occupations

Figure 11 – People Employed in N SK by Occupational Group, 2011

All Occupational Groups	Total
0 Management occupations	740
1 Business, finance and administration occupations	1,050
2 Natural and applied sciences and related occupations	420
3 Health occupations	575

4 Occupations in education, law and social, community and government services	2,270
5 Occupations in art, culture, recreation and sport	165
6 Sales and service occupations	1,875
7 Trades, transport and equipment operators and related occupations	1,520
8 Natural resources, agriculture and related production occupations	715
9 Occupations in manufacturing and utilities	190
Total	9,520

Source - Sask Trends Monitor from NHS Table 99-012-X2011051; Prepared by KCDC, 2016

Figure 11 shows the number of people working in the various occupational groups in 2011. The occupational groups are defined by the National Occupations Classification system (NOC). Most people in N SK work in Education and Government Services followed by Sales and Service and Trades and Equipment Operators.

When major occupations are broken out (Figure 12), the main skill sets of our workforce and the occupations with most employed can be seen. Teachers and Instructors are by far the largest occupation in the north with over 1200 people employed. This number is more than double the next largest occupation which is Cleaners and Janitors at 590. In 2011 Underground Miners, Drillers, and Mine Labourers were the next largest occupations followed by Finance and Administration and then Clerical.

A fact to note when reviewing these numbers is that the survey captures occupations of people living in N SK. So people that work at northern mines and live in Saskatoon are not counted while someone that lives in Montreal Lake and works in Prince Albert will be counted.

Analysis can help one to understand the reasons for numbers working in various occupations. First, as subsequent sections of this report show, N SK has an underdeveloped economy that is primarily driven by mining, government services, education, and health. Secondly, N SK has lower education rates that are lower than other regions of Canada. Thirdly, we have a very young population with proportionally high numbers of children and youth in the education system. Considering these factors, it is quite evident why Teachers and Instructors are our largest occupations. The factors of lower education levels and fly in mine sites which require large camp facilities lead to the high number of Cleaners and Janitors. The importance of mining is also shown by the number of Underground Miners, Drillers, and Mine Labourers. Our lower average education level leads to good representation in these occupations because of the shorter required training path, but note that representation in the professional and technical occupations in Natural Sciences (which are employed in the Mining sector) which require significant post-secondary education is low. Although these positions are employed at northern mine sites, they reside elsewhere, so are not counted in the survey.

The differences in living location choices available to people working in the professional and technical occupations are evident from the numbers as well. Professions like teachers and nurses have to live where they work, and this fact is reflected in the high numbers of those professions working in those occupations in the north. Other professions, like Natural Science professionals, when working in the mining industry, have a choice as to locating in a northern community or outside the north. Given that these positions are generally filled by non-northern residents who have the requisite education, these individuals usually choose not to live in northern communities. Professionals and technicians from many

fields service the north, but are located in non-northern communities, although in some cases their entire workload is related to northern projects.

Rough estimates of future vacancies can be made based on knowing the number of individuals working in an occupation, and anticipating turnover in an occupation. For the 5 Year Projection shown in Figure 12, we have used a Replacement Rate of 2.4% per year. This is the average Replacement Rate for Saskatchewan as determined by Statistics Canada based on 2011 data updated to 2016.

Other factors that should be taken into consideration when forecasting vacancies are major projects, expansions, retirements, reductions, and layoffs. The estimate shown in Figure 12 takes into consideration two major projects: the Gunnar clean-up, and the Tazi-Twe power project. Labour estimates for these projects are added to the turnover rate to make the projection for the occupations indicated. The occupations affected are shown in **bold**. Caution should be used when planning around numbers in occupations related to major projects as some occupations may only be recruited from specific communities or regions, or the project may not get the approvals necessary to go ahead. The other major factor affecting projected vacancies is the Rabbit Lake Mine reduction. We are waiting on occupation numbers and projections from the mining industry that consider vacancy estimates from remaining operations along with the estimates on time necessary to absorb the laid off workers from Rabbit Lake elsewhere in the mining industry. For that reason, we have not given projections for occupations that are primarily within the mining industry. These occupations are in *italics*. Occupations that are both significant in mining and in major projects are in ***bold and italics***.

Bold = Major Projects

Italics = Mining

Bold + Italics = Major Projects and Mining

Figure 12 – Vacancy Projections for Major Occupations

Major Occupations (Similar Skill Sets)	Cuurrently Employed	5 Year Projection (Turnover @ 2.4% per year + Major Projects)
0 Management occupations	740	
1 Business, finance and administration occupations		
Admin Officers, Executive Assistants, HR, Property Admin, Admin Assistants	440	53
Accounting Technicians, General Office Support, Reception, Data Entry, Accounting Clerks, Payroll Clerks, Library, Shipper/Receiver, Dispatcher	430	56
2 Natural and applied sciences and related occupations		

<i>Geoscientists</i>	10	
Civil Engineers	10	3
Land Use Planners	40	5
<i>Chemical Technicians and Geological Technicians</i>	55	
Forestry Technicians and Conservation Officers	90	11
Pilots	50	6
3 Health occupations		
Public Health, Environment, and Occupational Health and Safety Inspectors	60	7
Registered Nurses	205	25
Medical Technologists	95	11
Licensed Practical Nurses	55	7
Nurses Aides	105	13
4 Occupations in education, law and social, community and government services		
College Instructors, Elementary, and Secondary Teachers, Early Childhood Educators, Other Instructors	1215	146
Social Workers and Other Counsellors	75	9
Police Officers	120	14
Firefighters	190	23
Teacher Assistants	260	31
Home Support Workers	145	17
6 Sales and service occupations		
Chefs and Cooks	200	29
Butchers and Meatcutters	80	10
Security Guards	195	23
Retail Sales	415	49
Light Duty Cleaners and Janitors	590	81
7 Trades, transport and equipment operators and related occupations		
Ironworkers	25	23
Welders	10	11
<i>Electricians and Industrial Electricians</i>	50	
Power Linepersons	25	3
Plumbers, Pipefitters	55	16
Carpenters	275	57
<i>Millwrights and Industrial Mechanics</i>	35	
<i>Heavy Duty Mechanics</i>	40	

Aircraft Mechanics	40	5
Transport Truck Drivers	160	19
Heavy Equipment Operators	220	105
Construction Trades Helpers and Labourers, Public Works Labourers	210	94
8 Natural resources, agriculture and related production occupations		
Mine Supervisors	70	
Underground Miners and Drillers and Mine and Drill Labourers	445	
Logging and Forestry Workers and Labourers	120	14
9 Occupations in manufacturing and utilities		
Process Operators, Power Engineers, Processing Labourers	190	
Total	7100	1027

Source - Sask Trends Monitor from NHS Table 99-012-X2011051; Prepared by KCDC, 2016

2.41 Education and Training Observations

The value of making projections is that they are useful in setting priorities for training. So, from the projections made in Figure 12, the following education and training observations can be made:

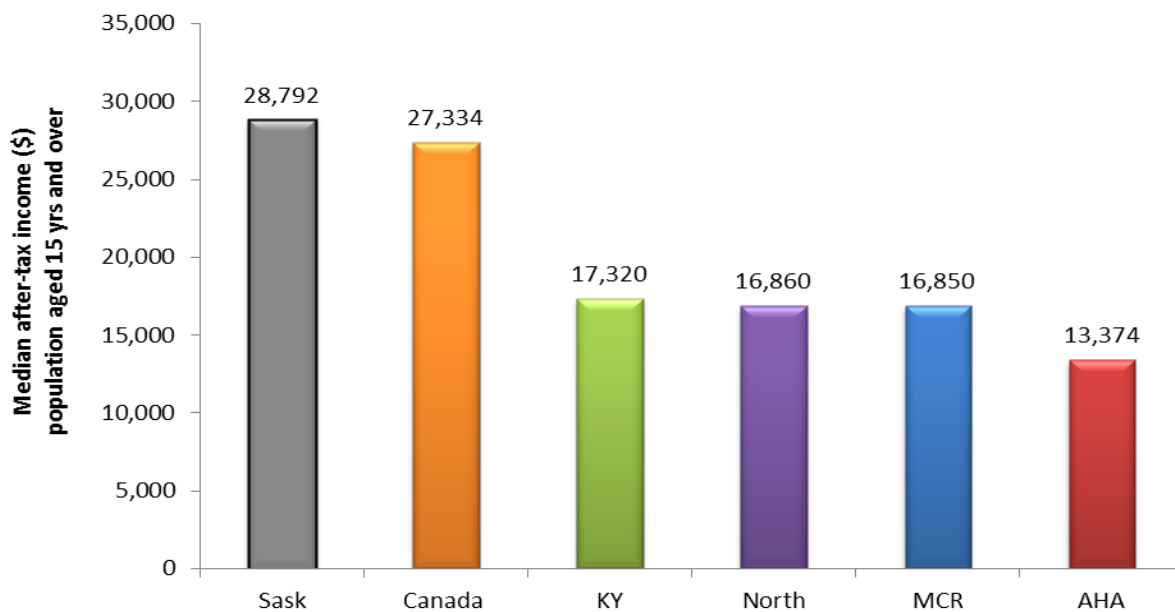
- Lower education and skill levels of the N SK workforce directly impact the types of occupations at which we work, and we are underrepresented in professional, technical, and trade occupations relative to number of positions employed, particularly in the mining industry.¹ Although we are still waiting on data from the mining industry that reflects the impact and revised demand after the shift of Rabbit Lake from operational to care and maintenance, it can be assumed that there will be continued opportunity for northerners in these occupations. So although Figure 12 does not show large projected demand in these occupations from turnover of northern workers, there will be vacancies available to northerners.
- Based on labour estimates from the Gunnar clean up and Tazi Twe projects, there will be additional employment opportunities in the occupations indicated in **bold** in Figure 12. Training institutions should work closely with contractors to mount appropriate training in the right location at the right time.
- Because of the numbers of Teachers and Instructors employed in the northern labour force, these occupations offer the best chance of employment in our region. The Bachelor of Education Degree is a credential that provides an excellent chance of employment in N SK.
- Administration, Clerical, and Accounting related occupations are very well represented in the N SK workforce. These occupations are employed by all industries and numbers of vacancies should be strong.
- There are strong opportunities in the Health sector with anticipated vacancies for Registered Nurses and LPNs. There should also be demand for Nurses' Aides and Medical Technologists.

¹ In June 2016, the N SK mining industry had at least 400 people working in trades, and roughly 70 of them living in N SK; 200 people working in Technical Occupations and roughly 55 living in N SK; and 155 people working as Natural Science Professionals with roughly 10 living in N SK

- Sales and Service occupations will provide significant employment opportunities.
- Although some occupations may not show large numbers of people employed, consideration should be given to training that supports economic growth in strategic sectors. For example, although the projected vacancies for Forestry Technicians and Conservation Officers may be modest, the technical skills and knowledge of ecosystems in training related to these positions is important to the expansion of Eco-Tourism and Non Timber Forest Products.
- More research is needed to identify occupations that have demand in the province and nationally. These occupations could be training targets even if demand is moderate in N SK with the intention of enabling mobility of N SK workers.

2.5 Income

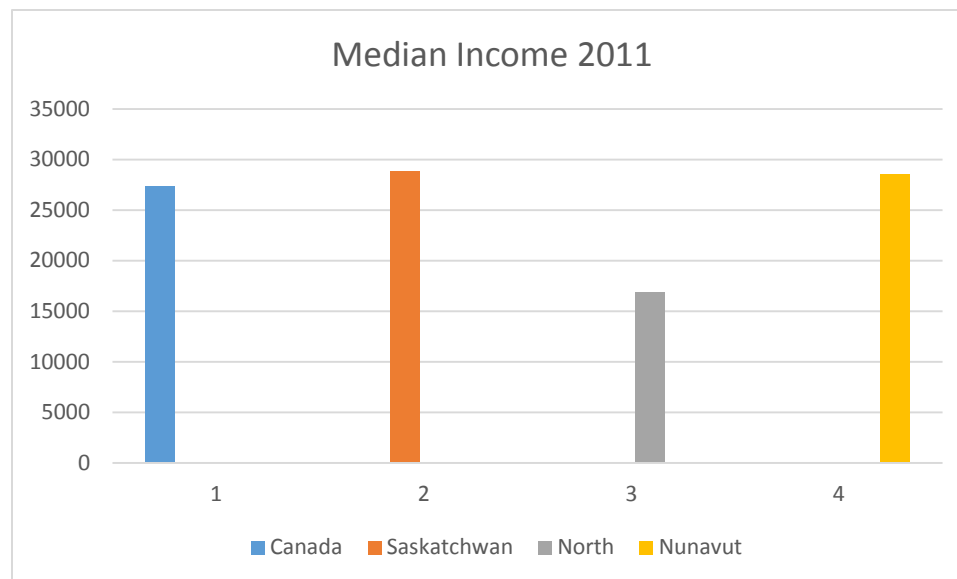
Figure 13 – Median After-Tax Income, Northern Health Regions



Source: Statistics Canada 2011 NHS Health profile Catalogue no. 82-228-XWE, Prepared by PHU, May 2014

N SK median after tax income for adults 15 years of age and older is significantly below that of Canadian or Saskatchewan residents.

Figure 14 – Median After-Tax Income



Source: Statistics Canada 2011 NHS Profile Catalogue no. 82-288-XWE, prepared by PHU, May 2014; Source: Statistics Canada, Income Statistics Division, Special Tabulations. Prepared by: Nunavut Bureau of Statistics, October 15, 2015; Compiled and prepared by KCDC, 2016

N SK lags behind other regions significantly in income. As shown in Figure 13, in 2011 the Median income for N SK was \$16,860 compared to \$28,792 for SK, \$27,334 for Canada, and \$28,580 for Nunavut. The Low Income Cut Off – LICO (known as the poverty line) was \$14,454 for people living in small communities in Canada². There is not enough information to determine the number of N SK individuals and families living below the LICO in N SK, but it is likely to be significant given that the median income for individuals is so close to the LICO. Also note that Figure 13 shows that the Athabasca Region’s median income is \$13,374. This is below the Canadian LICO, meaning that at least 50% of the population over 15 in the Athabasca Region had incomes below the poverty line in 2011.

2.6 Subsistence Practices and Food Security

In 1983 and 84, the Village of Pinehouse engaged Terry N. Tobias and James J. Kay to undertake a study that would calculate the value of the subsistence practices of hunting, fishing, gathering, using fuelwood and building with local logs. The study was published in 1994 by the Arctic Institute of North America and is available online at:

<http://arctic.journalhosting.ucalgary.ca/arctic/index.php/arctic/article/view/1291/1316>

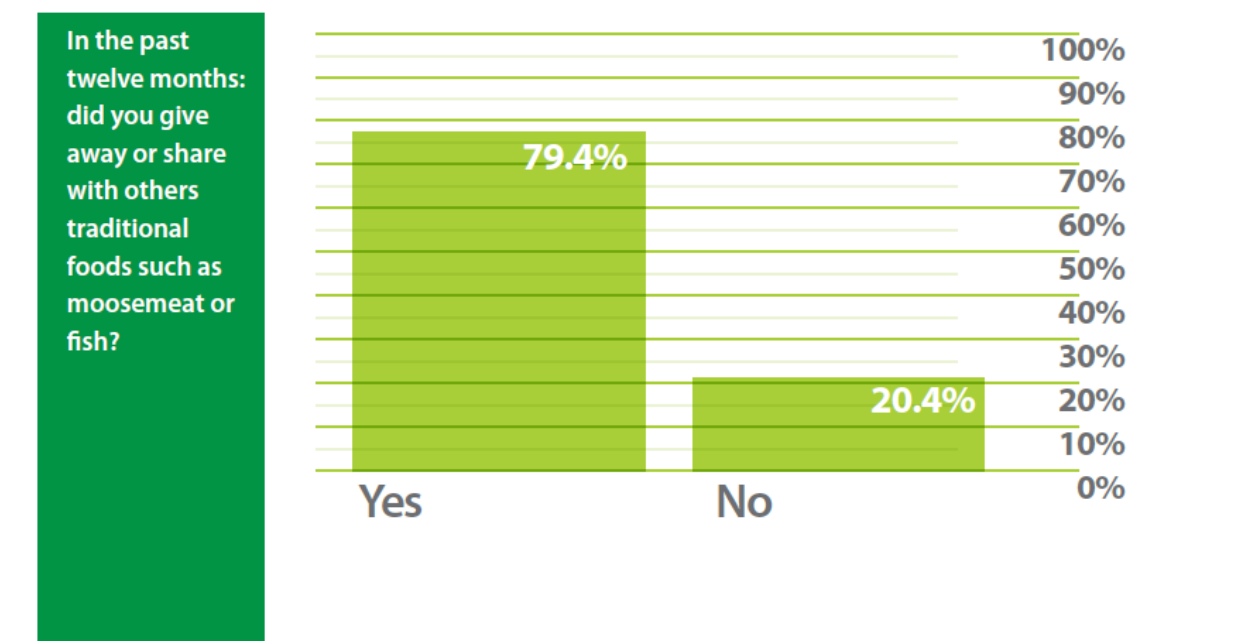
The study found that the value of bush meats, fuel wood, berries, garden produce, and construction materials harvested by the people of Pinehouse to be worth approximately \$560,000 in 1984 dollars, which is about \$1.3M today. At the time, the value of the bush harvest accounted for about 17% of the total income of Pinehouse which had a population of 676. When the value of commercial fishing, wild rice, trapping and handicrafts was added, the total contribution of these pursuits was approximately \$1.14M (\$2.65M today), or about one third of the village’s income.

² Source – Statistics Canada <http://www.statcan.gc.ca/pub/75f0002m/2012002/tbl/tbl01-eng.htm>

Although the prevalence of subsistence practices may have waned somewhat since 1984, more recent studies suggest the tradition is still widely practiced. In 2010, the U of S International Center for Northern Governance (ICNDG) did a study on the prevalence of subsistence pursuits in the northern economy as part of their Northern Aboriginal Political Culture study, Northern Voices, A Look Inside Political Attitudes and Behaviors in Northern Saskatchewan. The study found that almost 80% of northerners share traditional foods such as moose meat or fish. Given this information, it is reasonable to assume that subsistence activities make a significant contribution to the northern economy. This contribution is not captured in the numbers shown in Figures 13 and 14. Put in financial terms, if subsistence activities add another 5% to the incomes of northerners over 15, the total contribution to northern income would be close to \$20M.

The contribution of subsistence practices is not considered in the estimates of income and employment generated by Stats Canada. It is also likely that some of the financial contribution of other agricultural and gathering income such as cash paid to mushroom pickers or wild rice baggers is not captured as well. The significance of sustenance practices and potential contribution to the N SK economy needs to be better researched. Particularly intriguing are the linkages between traditional indigenous bush lifestyle and sectors such as non-timber forest products and cultural tourism.

Figure 15 – Sharing of Traditional Foods



Source - University of Saskatchewan, International Center for Northern Governance and Development

3.0 Economy

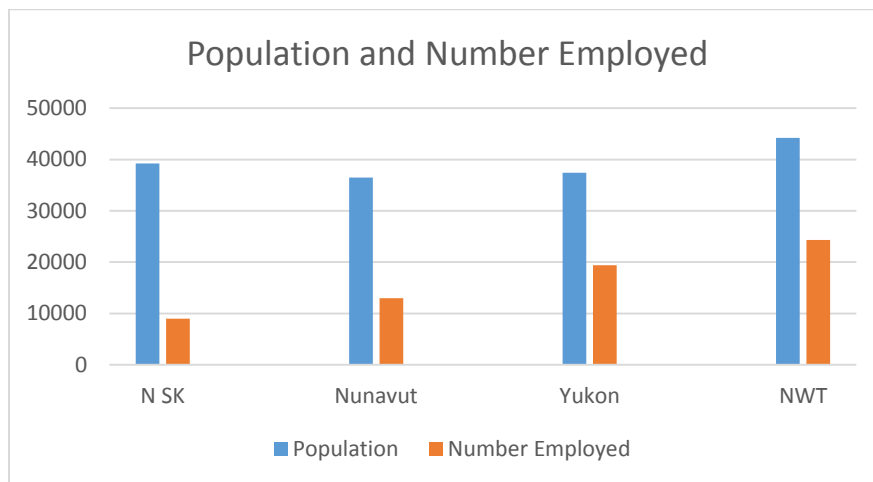
3.1 N SK Economy Compared with Northern Territories

Based on the information provided above that shows N SK's employment rate and income relative to other regions, it would logically follow that our economy is not developed to the point at which we can generate the numbers of jobs that would give us employment rates similar to SK, Canada, or Nunavut. In order to analyze the N SK economy in depth and compare it to the economies of other regions, an ideal process would be to compare the Gross Domestic Product (GDP) of the regions. However, there is not enough data available at this time to calculate a GDP for the N SK region.

Given GDP data are not available, a picture of the economy can still be derived by analyzing and comparing numbers of businesses and employees in industrial sectors by region.

Figure 16 compares the overall populations and numbers of employed in N SK, Nunavut, Yukon, and NWT. Although all regions have similar populations (N SK 39,212, Nunavut 37,400, Yukon 37,400, NWT 44,200), N SK with an estimated 9,000³ employed has fewer people working than Nunavut (13,000⁴), Yukon (19,400⁵), and NWT 24,300⁶). N SK also has fewer businesses in total than the other regions with 902 compared to Nunavut (1351), Yukon (4539), and NWT (3557) as shown in Figure 17.

Figure 16 – Population and Number Employed



Source – Employment data - Sask Trends Monitor from Stats Canada Data, Population data – Sask Covered population, Prepared by PHU, Stats Canada CANSIM table 051-001. Note population data are for 2015, employment data are for June 2016, Prepared by KCDC 2016

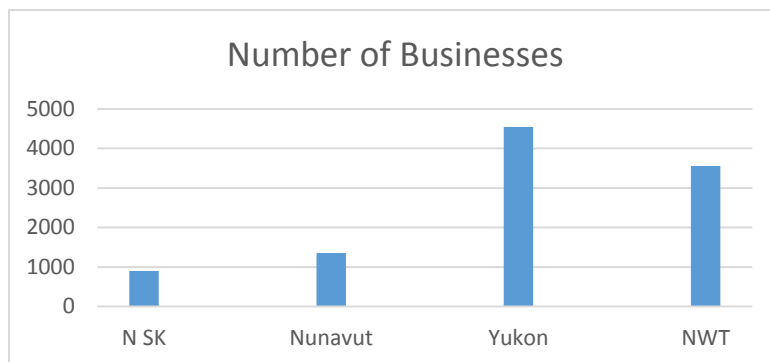
³ This workforce number is an estimate as of June 2016, Source - Sask Trends Monitor from Stats Canada Data. It differs from the total workforce number shown in Figure 11 and from the total workforce number used to calculate employment rates in Figures 8 and 9. Notes on calculation method in Appendix 1.

⁴ This workforce number is an estimate as of June 2016, Source Sask Trends Monitor from Stats Canada Data. It differs from the total workforce number used to calculate employment rates in Figures 8 and 9. Notes on calculation method in Appendix 1.

⁵ This workforce number is an estimate as of June 2016, Source Sask Trends Monitor from Stats Canada Data. Notes on calculation method in Appendix 1.

⁶ Ibid

Figure 17 – Number of Businesses



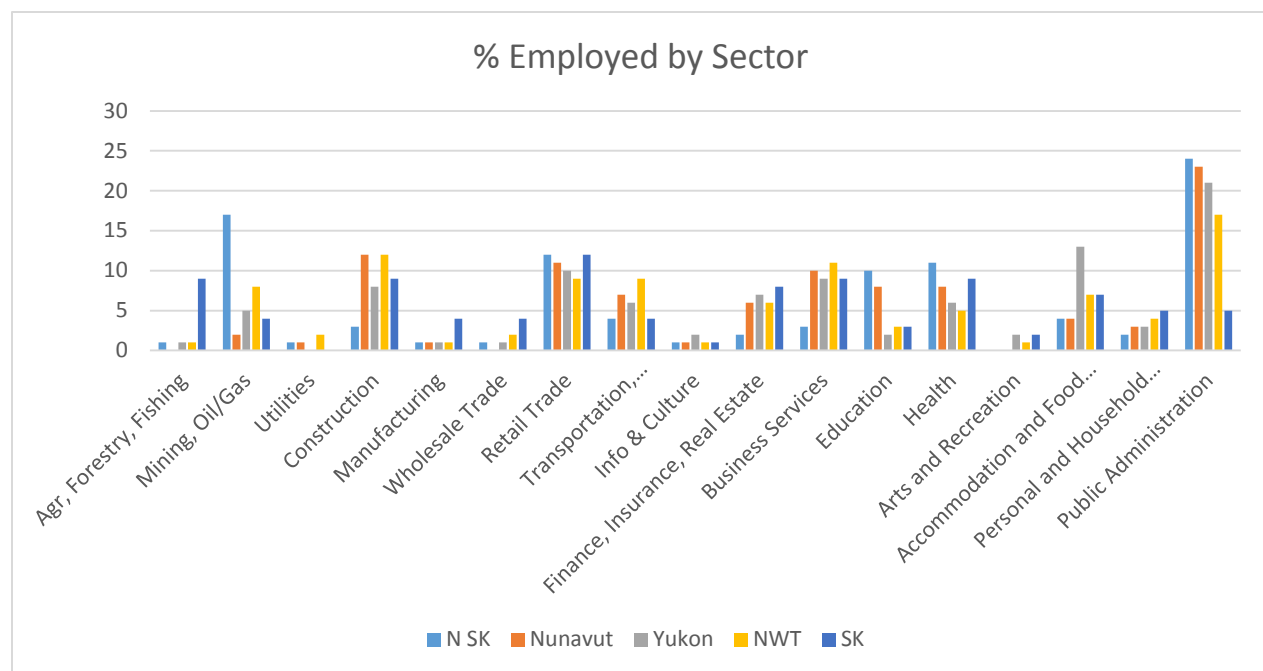
Source – Sask Trends Monitor from Stats Canada Data June 2016, Prepared by KCDC 2016

Figure 18 shows estimated⁷ percentages of workforce employed by industrial sector in June 2016. In comparison to the other regions, N SK's economy is seen to be primarily based in Mining and Public Administration with respectively 17% and 24% of the workforce employed in those sectors. Our next largest sectors are Retail (12%), Health (11%), and Education (10%). In terms of percentage of workforce employed, our economy does not differ greatly from those of the northern territories in having these sectors with the majority of employment. Notable exceptions are Construction; Finance, Insurance and Real Estate; and Business Services. Only 3% of N SK's workforce was in Construction while Nunavut and NWT had 12% and Yukon had 8%. 2% of N SK's workforce was in Finance, Insurance and Real Estate while Nunavut and NWT had 6%, and Yukon 7%. In Business Services, N SK's percentage was 3% while Nunavut, Yukon, and NWT percentages were 10, 9, and 11 respectively.

N SK has the highest percentage of people working in Mining, Oil/Gas of all the economies. This means that our economy is less diversified than the other regions. The Saskatchewan provincial economy is the most diversified of all compared with employment spread more evenly across the sectors.

⁷ The workforce estimates are based on June 2016 data. Notes on calculation method in Appendix 1.

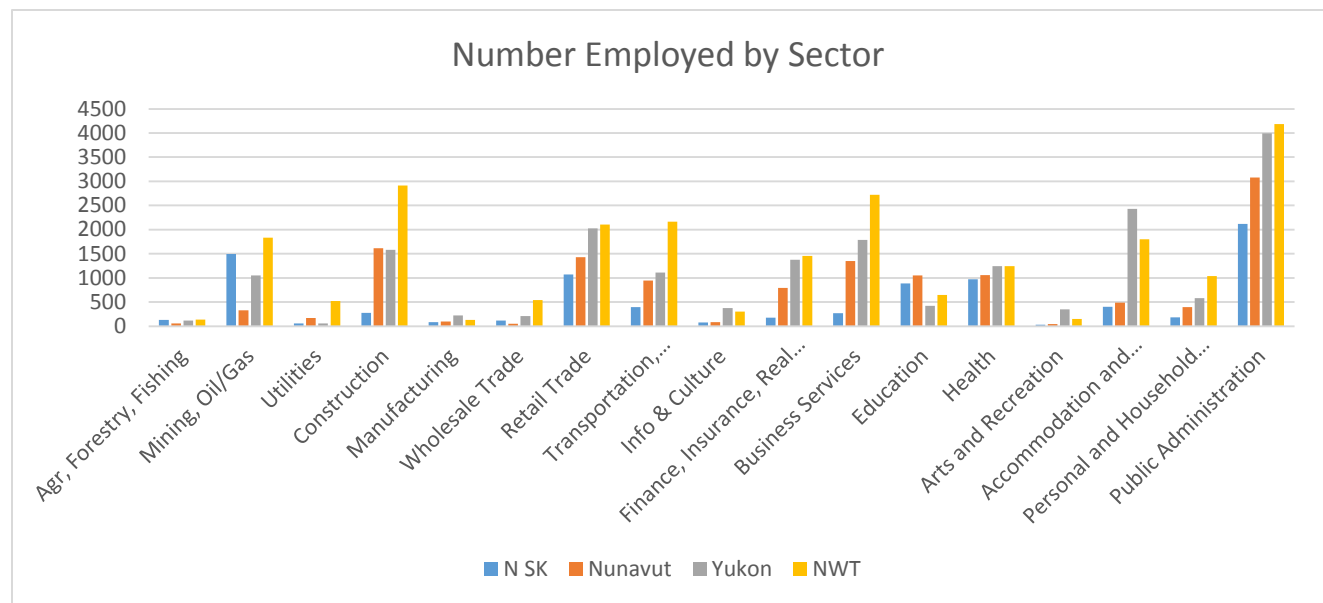
Figure 18 - % Employed by Sector



Source – Sask Trends Monitor from Stats Canada Data June 2016, Prepared by KCDC 2016

When numbers of employees per sector are considered, the size and lack of diversification of the N SK economy becomes more apparent. Our small economy, based on the primary sector of Mining, Oil/Gas and the government funded sectors of Health, Education and Public Administration does not generate enough activity to give us comparable numbers of businesses and workers in the sectors of Construction; Retail Trade; Transportation; Finance, Insurance, and Real Estate; Business Services; Accommodation and Food Service; and Public Administration. More sector specific research is required to understand why the N SK economy does not generate employment similar to the territories in sectors such as Construction; Finance, Insurance, and Real Estate; Business Services; and Accommodation and Food Services. Section 3.2 provides some preliminary discussion on Factors affecting our economy.

Figure 19 – Number Employed by Sector



Source – Sask Trends Monitor from Stats Canada Data June 2016, Prepared by KCDC 2016

3.2 Factors Affecting the N SK Economy

The comparison between N SK and other regions leads to the question of why the N SK economy is smaller than those regions. The reasons are matters of speculation and the data are in short supply, but there are a number of potential factors.

First, in comparing economies of N SK to the Territories, it is important to note that each Territory is a Federal jurisdiction, with associated funding from the Federal government. The enhanced levels of funding are most likely reflected by the larger numbers of employees in Public Administration. N SK has 2116⁸ people working in that sector while Nunavut has 3078⁹, Yukon has 3996¹⁰, and NWT has 4182¹¹. In addition to more activity in the Public Sector in the territories, distance is a factor. Employees in the sector can service N SK from outside the region while territorial government residency policies and distance make this practice more difficult in the territories. In the Yukon, NWT, and Nunavut wages paid to Public Sector employees would then be spent in other sectors raising the levels of activity in Retail Trade; Business Services; and Finance, Insurance, and Real Estate. Additional funding may enter the Territorial economies through incentive programs and defense spending.

Another factor that affects the N SK economy is the drain of value of goods produced to other regions. The drain occurs in a number of ways: through workers at northern operations and projects who do not live in the region and spend their pay cheques here; through industry, business, and residents purchasing goods and services from outside the region; and by raw resources being taken outside of the region for value added processing. It is further accentuated when northern owned businesses and

⁸ Ibid

⁹ Ibid

¹⁰ Ibid

¹¹ Ibid

organizations are forced by necessity to locate offices and personnel in southern locations for efficiency and proximity to decision makers and markets outside the region. The northern economy then loses the wages of the workers located outside the region.

Capital investment in N SK was at a low level in June 2016 when the data were gathered. There has been little recent capital investment in the region, which means construction projects are few. This can be seen in the low number of construction employees. To a large extent, the current low capital expenditure is reflective of the low price of N SK's primary commodity: uranium. The low number of workers in construction during a slow period for mining also indicates a low activity level in other sectors which could attract investment and drive construction.

To a large extent, the N SK economy is reflective of the efforts made in economic development over the last 35+ years. Since the discovery of the high grade uranium deposits the primary focus has been on building human resource and business capacity to meet the needs of the Mining sector. This focus has been correct and effective: northern workers have been successful in securing positions at the northern sites, and northern owned businesses provide a large portion of the services to the operations. Inadvertently, this success also enabled the slow erosion of development efforts and supports in other sectors. Consequently, relatively little was done to support growth in small sectors such as wild rice and value added forestry. Our current economic profile with relatively strong activity in only Mining, Education, and Health reflects this history.

3.3 Economic Development Approaches

The Territories each have an active economic development process. Brief overviews of these practices are provided below for consideration in the development of measures to encourage economic development in N SK.

3.31 Yukon – The Yukon has a Department of Economic Development strategic plan for the period 2012 – 2017. It can be found at: http://www.economicdevelopment.gov.yk.ca/pdf/EcDev_Strat_Plan_2012-2017.pdf . The plan consists of three high level Strategic Goals: Attract Investment; Grow Yukon's Economy; and Build Yukon's Competitive Advantage. Within these goals a number of objectives and actions are identified. These include: activities to attract investment in diverse sectors; recognizing the importance of and supporting small business; marketing; workforce development; encouraging research and innovation; physical infrastructure; and modern policies and regulations. The plan also lists performance measures which can be used to gauge the effectiveness of the various objectives and strategies.

Specifics on the enactment of the Strategic Plan can be found on the InvestYukon web site (<http://www.investyukon.com/>). The site provides information that anyone interested in investing in the Yukon or starting a business there would need to know. Selected information categories are below:

- Priority Sectors (Identified as investment-ready and expanding)
 - Film and Sound
 - Forestry
 - Innovation and Technology
 - Mining and Exploration
 - Oil and Gas

- Tourism and Culture
- Doing Business
 - Competitive Tax Schedule: includes tax incentive programs such as personal investment in small business – tax credit for investment; Research and Development tax credit for scientific research and experimental development in general, plus additional credit for expenditures with Yukon College; Yukon Manufacturing and Processing Tax Credit – tax break for corporations engaged in manufacturing and processing
 - Financial Incentive Program: (Strategic Industries Development Fund - identify and facilitate the development of strategic industries; Enterprise Trade Fund – open and develop markets; and Regional Economic Development Fund – economic planning at the regional level)
 - Labour Force: information on Yukon Labour Force
 - Market Access: Routes of Access to Markets
 - Starting a Business in Yukon: Information on registering and starting a business
 - Success Stories: Examples of successful businesses

3.32 Nunavut – Nunavut had articulated a 10 year Economic Development Strategy in 2003. It can be found at: <http://nni.gov.nu.ca/sites/nni.gov.nu.ca/files/09nedsE.pdf> . It was developed following discussion and consultations among a broad coalition of government, Inuit organizations, non-governmental, and private sector groups called the Sivummut Economic Development Group. It incorporated the guiding principles of: Cultural Integrity; Determination and Realism; Community Control; and Co-operation and Co-ordination. It focused on Strategic Priorities of: The Land; People; Community Economies; and the Territorial Economy.

The Strategy discussed the following sectors as important to the economy:

- Harvesting: Hunting for household consumption and traditional food distribution
- Sealing: Connected to Harvesting through the consumption of seal meat, in making clothing, and through using skins as a resource for arts and crafts industry. Commercial viability based on market demand for sealskin.
- Arts Economy: From soapstone carving to making feature films
- Public Sector: Recognized as Nunavut's main economic driver.
- Small and Inuit Business: Priority was placed on the growth of small business to take on a prominent role in economy as government spending slowed down.
- Tourism: Plans to increase income by attracting vacationers looking for experience based holidays. Focus on ecotourism.
- Commercial Fisheries and Fish Processing: Plans to increase economic returns by expanding processing facilities.
- Mining: At the time, 2 mines had just closed and new projects were not on stream yet. Mining had contributed over \$185M to Nunavut's GDP. Encouraging prospects for diamonds, gold, and base metals. Recognition that future of industry depended on development of infrastructure.
- Oil and Gas: Nunavut holds 5% of Canada's known oil reserves and 15% of gas reserves. Expectations of revival of the industry.

Development of a second Nunavut Economic Development Strategy (NEDS II) is underway. The Government of Nunavut, department of Economic Development and Transportation web site (<http://gov.nu.ca/edt>) has sector specific strategies for: Transportation; Energy; Mining; Tourism; and Arts and Crafts. The site provides information on programs that are available to support economic development.

3.33 Northwest Territories – The NWT Department of Industry, Tourism, and Investment has recently released an Economic Opportunities Strategy. The Strategy is a comprehensive review and plan to guide economic development. It is available online at: http://www.iti.gov.nt.ca/sites/www.iti.gov.nt.ca/files/0004-704_econ_opp_strat_low-res.pdf. Strategy consultations and development was overseen by a committee consisting of members of associations representing communities, business, federal, and provincial governments. It provides an overview of economic sectors and discusses potential of each. Recommendations and targets for growth are provided in the following areas:

- Stimulating Investment
- Encouraging Residency
- Expanding Potential (mainly focused on mineral sector)
- Enhancing Infrastructure
- Building Regional Strengths (focusing on tourism, arts, manufacturing, commercial fishing, forestry, agriculture, and traditional economy as well as growing domestic markets for NWT products)
- Establishing a Positive Entrepreneurial Environment
- Prepare NWT Residents for Employment

The Department of Industry, Tourism, and Investment web site (<http://www.iti.gov.nt.ca/en>) lists economic sectors and gives a description of activity and potential in economic sectors along with support programs. The Department also has developed an information portal called InvestNWT (<http://investnwt.com/>) which provides information on making investment and doing business in the NWT. It provides an overview of economic sectors along with information on programs, incentives, links to further information, and news articles about economic activity.

4.0 General Observations

- Education and Training initiatives can have a positive effect on the economy, employment rate, and average income. Given the relatively small number of jobs in the northern economy, and subsequent low numbers of vacancies, it would make sense to provide courses that ladder from skilled to technical to professional in order to enable people to gain qualifications for more occupations through the same training course. An example of this is found in the Civil Technician program being offered at Northlands. This one year program can lead to employment as a construction technician or survey technician. Graduates of the program can take a second year at Moose Jaw Campus and earn a diploma. For those that want to continue their studies from that point, The Civil Engineering Technology program is transferable to the Bachelor of Technology program at Memorial University or to the Lakehead University Faculty of Engineering.

- Education and Training initiatives would appear to be most effective, give students the best chance of employment, and do the most to develop the N SK economy when aligned strategically to one or more of the following factors:
 - High number of jobs in occupations related to the program (e.g. – providing Bachelor of Education studies given the high number of teachers in the N SK labour force)
 - Occupational demand from major projects or expansions
 - Moderate occupational demand in the north, but strong demand in the province or nationally (graduates have options of employment outside the north if few jobs available locally)
 - Jobs with northern companies currently held by people living outside the region (e.g. – providing professional and technical training in the natural sciences given the number of these jobs held non northern residents)
 - Training for skills in sectors that are designated for growth by strategic economic development planning (e.g. – if value added wood manufacturing is designated as a growth area in an economic development strategy, courses that lead to professional certification in engineering and design, as well as logistics and marketing)
- Although N SK has low education levels compared with most regions, education is not the only factor affecting our employment rate and average income. Put quite simply, we cannot create jobs only by training people. The process of job creation would occur through development and growth of industrial sectors. Ideally, training would be aligned with an economic development strategy in order to provide the skills needed as the labour force requirements expand.
- N SK's high youth population and rate of population growth makes effective overall growth challenging. If 2.4% of our approximately 10,000 person workforce retire each year, 240 new workers would be required overall. However, the 15 – 19 year olds constitute around 8.5% of our 39,212 population. If they enter the workforce at 20 years old (after taking post-secondary training), we would have over 600 new workers entering the work force, leaving a gap of about 360 jobs per year. In addition, if we were to endeavor to increase the employment rate from its current 38.4% to the provincial level of 65.1% (increase number employed from current 10,000 to around 17,000) over 10 years, we would have to add an additional 700 jobs per year. So, in order to keep up with population growth and increase our employment rate to that of the rest of the province, N SK would have to add over 1000 jobs per year, export that many workers, or a combination.
- In addition to strategic post-secondary education and training, economic development is necessary to grow the N SK economy and create the jobs necessary to increase our employment rate. On review of the economic development actions of the northern territories, a common element is an economic development strategy. In general these strategies identify industry sectors that are important to growth and discuss the potential. Goals for growth over a set time period are also provided. At this point, N SK does not have a regional economic development strategy. Given the differences between our regional economy and that of the province, it would be beneficial to have our own strategy.

- Government assistance at the federal or provincial level does not need to be extensive to develop a strategy and take action. The Northern Labour Market Committee may have the reach necessary for strategy development. This committee was set up primarily to guide training development when the necessary action was to train northern residents for jobs in mining. Things have changed in 35 years, and although training and mining are still important, the necessary actions for economic development have changed as well. The structure of the NLMC with its sector sub committees could work very well for the creation of an economic development strategy. Local government is also an important potential participant, through both individual community governments and associations such as the Tribal Councils, Metis Regions, and New North. New North has been active in a general “Northern Strategy” development which would be further reaching than only economic development. The U of S International Center of Northern Development and Governance (ICNDG) has been assisting in that process. The NLMC could undertake the economic development part of that overall strategy development. The ICNDG, and Keewatin Career Development Corporation (KCDC) would be well positioned to provide technical assistance. Business, industry, northern owned development corporations, and business associations such as the chambers of commerce should be involved.
- At the community level, actions can be taken to support a strategy. Communities may have differing priorities related to the strategy as well. The priorities would be driven by the extreme difference in employment rates between northern communities as shown in Figure 10. Priorities could include development of a particular sector, developing investment attraction strategies, and developing a community human resource plan that sets targets for training and employment of youth as they enter the workforce.
- Given the challenge of creating enough jobs within the northern economy to employ our growing workforce, it makes sense to consider creating a regional human resource development strategy that considers preparation of northerners for employment both inside and outside the region. Issues of northern residents’ mobility and willingness to relocate must be taken into consideration, and more research is needed to find examples of strategies in other regions that prepare for both regional and outside employment. Initially, it would make sense to analyze numbers of people entering the workforce, look at regional, provincial, and national labour requirements, promote demand occupations, develop marketing strategies for northern workers, and refine the plan at the community level. The human resource plan should be linked to and informed by the economic development strategy.
- Although not essential, assistance at the federal and provincial levels to enact an economic development strategy would greatly increase the chances of success. Based on analysis of economic growth programs in the territories, methods of assistance from government come in three general forms:
 - Programming – usually funding available for selected activities designed to grow targeted sectors
 - Tax Incentives – tax breaks usually tied to investment in targeted sectors

- Policy Review – Departmental policies being aligned to promote or at least not hinder growth in targeted sectors

The instruments available to federal and provincial government mean that support can be given for economic development strategies even in times of austerity. In fact, tax incentives may prove to be revenue positive for government if enough economic activity is generated through developments. Policy Review and change depends a lot on existing bureaucrats supporting the N SK strategy within their own departments, and should not add additional financial burden to government.

- If assistance at the federal and provincial government levels is not forthcoming, local governments and northern entities such as the northern owned development corporations, NWC, PLEDCO, the Community Futures organizations, NLMC, KCDC, chambers of commerce, etc. can enact economic development priorities that come from a strategy. Sectors can be targeted to attract research and development as well as outside investment.
- In addition to studying examples in the territories, the other Canadian provincial norths should be looked at to gather information on economic development initiatives. Also Alaska and northern European countries should be studied. The Ministry of Economy published an interesting paper in summer 2016 entitled Attracting Foreign Investment to Northern Saskatchewan. (<http://career.kcdc.ca/images/pdf/investors.pdf>)

The paper discussed potential investment through both an “industrial” approach (mining, forestry, fishing), and/or through a “modern economy” approach (bioenergy, wind power, data centers, eco-tourism). Examples of development in northern European countries were used to discuss development in the modern economy.

- As discussed in section 2.6, subsistence practices appear to be prevalent in N SK, and contribute to the economy in a real way. This fact needs to be considered in the creation of an economic development strategy. Both the NWT and Nunavut list traditional activity and harvesting as priorities in the economic development strategies. Skills and practices in this sector connect naturally with development of cultural and eco-tourism, commercial fishing, non-timber forest products, and the exploration phase of mining. All of these sectors would benefit from introduction and expansion of navigational technology (GPS, GIS) in order to document and facilitate product certification, marketing and knowledge transfer. Land access and harvest sustainability are also crucial components to development in any of these sectors.
- A large part of our potential economy flows from the N SK to other regions. Some policies are in place to slow that flow, such as the 50% northern resident employment target at mining operations. Economic Development and Human Resource strategies need to build on the advantages of these policies, but also to determine actions that will give N SK a way to slow the economic flow from N SK to other regions. This could be achieved by exporting workers, attracting investment, selling products and services, and by attracting relocation of people working at northern sites and living in other regions to N SK. The corridors through which our economy flows out to other regions go both ways. Ideally economy would flow back to our region through the same corridors.

- Knowledge development in N SK is essential to economic growth. N SK economic growth would benefit from Market knowledge to identify demand for products and services from specific demographics and regions. The field of Geomatics would provide technologies that enable study of plant abundance and ecological sensitivity. These data can enable map creation to inform sustainable development practices and land access policy.
- The Economic and Human Resource strategies would benefit from considering our challenges and considering how these can be turned into strengths. For example, our high youth population means we have a good supply of labour readily available; our isolation and lack of development in large tracts of wilderness means that we have organic, natural products that can be harvested in the boreal forest; and our lower education rates are offset by there being a large number of people with at least basic bush skills and a real connection to the land.

5.0 Follow Up

KCDC will undertake the activities below in follow up to the findings in this report:

- This report will be accessible. It is online at:
<http://kcdc.ca/economicandlabourmarkettrendsreport.pdf>
- More detailed reports on sector activity will be published in the future. These reports will be sent out electronically to the NLMC and available online. The mining sector will be updated first and will include occupational employment data which will reflect the lay-offs at Rabbit Lake.
- An update to the full report will be published in November 2017.
- In addition to career development, KCDC will continue activities related to economic development, career services, and training to employment. These activities include:
 - Community Economic Development Intern Training – delivered on west side, started with First Nations Communities
 - Graduate Employment Follow Up (for Northlands) – providing a promotion and referral service for northern post-secondary grads to employers
 - Support for non-timber forest products sector through workshop coordination, development of GPS/GIS protocols, as well as product and market research and development
 - Support for mining exploration sector through advocacy of Pre Cambrian Geological Laboratory, and development of a “Core Day” promoting northern exploration services, and workforce
 - Support for Education Sector through career events and presentations, as well as program and resource development
 - Custom training development and coordination services available for any northern business or sector (e.g. Fish Plant worker training for Ile a la Crosse Fish Co.)
- KCDC widening its scope as an industry/education council to include support of economic development. It is expanding its membership to: “Any organization that Serves Northern Saskatchewan”; changing its mission statement to: “support sustainable socio economic development in Northern Saskatchewan by connecting communities, business, industry, educational institutions and employment agencies”; and changing its name to Keewatin Community Development Association.

Appendix 1 Notes on Data

- Workforce by NOC - The data are a snapshot as of May 2011 but include anyone who has worked over the 18 month period previous to that
- Most of the data for N SK are representative of Saskatchewan Census Region 18. The Census Region corresponds with the provincial definition of the Northern Administration District. Information on Census Region 18 can be found at:
https://en.wikipedia.org/wiki/Division_No._18,_Saskatchewan
- Many of the data in this paper are derived from initial analysis done by either the Population Health Unit of Northern Saskatchewan or the Sask Trends Monitor. In particular, Doug Elliott of the Sask Trends Monitor has contributed to accessing Statistics Canada data
- Many of the data in this paper come from the 2011 census. Starting next year, data from the 2016 census will come available. We can then see changes that may have occurred, and new trends.
- The data used to create Figures ES 7, ES 8, 16, 18, and 19 were derived by making calculations based on a table of Business Counts per region created by Sask Trends Monitor from Stats Canada data. The table provides number of businesses with number of employees based on a range (5-10, 10-19, etc.). Numbers of employees were calculated using the following method: baseline + 25% for N SK and SK; baseline for the three territories. Method of calculation was based on cross reference of total number of employees with other sources. The method of calculation may result in overstating N SK and SK sectoral employment and understating the three territories' sectoral employment.
- The report approach has been based on the Previous Northern Training Needs Assessment reports. Author Terri Franks in particular should be recognized for her contribution to data gathering and interpretation related to the labour market in N SK