LOOK NORTH

DESKTOP REVIEW REPORT
18 MARCH 2017.

“can’t see the forest for the trees”

DRAFT

KARL WIXON.
For ARAHIA & BIGGAR IDEAS partnership.

TABLE OF CONTENTS

1.0 INTRODUCTION

This report provides a summary overview of observations grouped under a few key sections, from desktop review of publications as provided and sourced, as well as independent online review. It is not trying to provide a detailed summary of, nor necessarily mirror their findings. It looks at each report and asks the question 'So what?', what might this mean in terms of needs and economic opportunity for the Look North Movement.

Commentary provided here may in places be contrary to report findings or recommendations, based on looking at these reports through a lens of long term growth and designing a future, whereas a data analysis generated approach tends to project an expected future and looks at opportunities based on trends, when often solutions defy trends to alter from the projected trajectory into uncharted territory. Commentary provided has also been influenced by findings of face to face meetings in Thompson, The Pas and Flin Flon undertaken in December 2016.

The phrase "Can't see the forest for the trees" feels like an accurate description of the current situation for a region awash in strategy where most of it is broad in scope and high level in nature – with little 'hard strategy' focussing on specific growth opportunities. While some of the individual documents may, in places, have hints of colour and energy, en masse they become grey. There is no stand-out highlights beyond what feels like an inventory of 'to do's' with a focus on developing an 'eco-system for success', rather than growth opportunities. Many suffer a similar syndrome of trying to be all things to all people and. in doing so. render themselves into being not much for anyone. Every document reviewed feels very inward looking, perhaps that is the phenomena of being in the centre of the continent; no robust 'outside-in' perspective is evident.

If there is a key lesson in this for Look North, it is the need to 'shift the dial' from a quite passive state, to an active one and from an inward looking one, to an outward looking one. The most valuable thing we could do is unearth 'real opportunities' that can be advanced by 'real people' – where policy or systemic change is not the only targeted outcome. That is not to ignore the need for policy and systemic change, but to recognize enterprise development as requiring action and investment as key to unlocking new long term growth.

It also highlights the need for the Look North Task Force to make some hard decisions about what to focus on and what not to focus on.

From my analysis, the greatest missing dimension from all of the documents reviewed, is a focus on new enterprise generation beyond meeting local needs, but meeting wider market and global market needs to stimulate new activity and bring in new revenue and investment to Manitoba.

Most of the 'local solutions for local needs' agenda merely serve to recycle capital and revenue within the economy – which is important, but will not generate the long-term lift required. Tourism is one of the few domestically delivered 'exports' but, at this stage, only represents 2.8% of GDP and is very domestically focussed. Some sectors not reviewed here or highlighted in any of the strategies reviewed, have immeasurable potential e.g. the development of a vibrant Northern Digital sector, for instance, need not suffer from geographic constraints, other than broadband access.

Everything points to a need for a shift in enterprise culture from an internal 'service' mentality to a more innovative outward looking 'high value' one.

Many of the areas of current economic development focus sit on the consumption side of GDP, not production. If Look North could stand out amongst the trees, it would perhaps be by focussing on the production side of GDP more strongly by stimulating outward looking new enterprise development as a necessary companion to a focus on social enterprise. This report proposes a framework for that dual focus.

2.0 REVIEW METHOD

This review was undertaken to assist with:

- Developing an ‘aerial’ view of the Manitoba Economy and Strategic environment.
- Identifying any key opportunities for strategic alignment with Look North Strategy.
- Adding insight and depth to findings from meetings and workshops being undertaken in the Look North Project.
- Providing the basis for conceiving a strategic framework for Look North that takes into account other existing strategies.

As such, this is not a detailed analysis. Rather, it presents high level overviews of some key documents provided to the reviewer or found through online research into identified fields of interest. It then asks ‘So what?’, as in what does this mean for the Look North project? It also seeks to identify any evident opportunities or synergies.

In some cases, information sought or requested could not be found or provided, so there are gaps in this review, in particular:

- Information on propensity and patterns of entrepreneurship, such as data on rate of start-ups, patent registrations etc.
- Northern Manitoba Education Strategy – none provided or found.
- Information on the make-up and value of the First Nations & Metis economies.

These are all key areas of interest to Northern Manitoba Economic Development requiring further research.

3.0 OVERVIEW OF FINDINGS

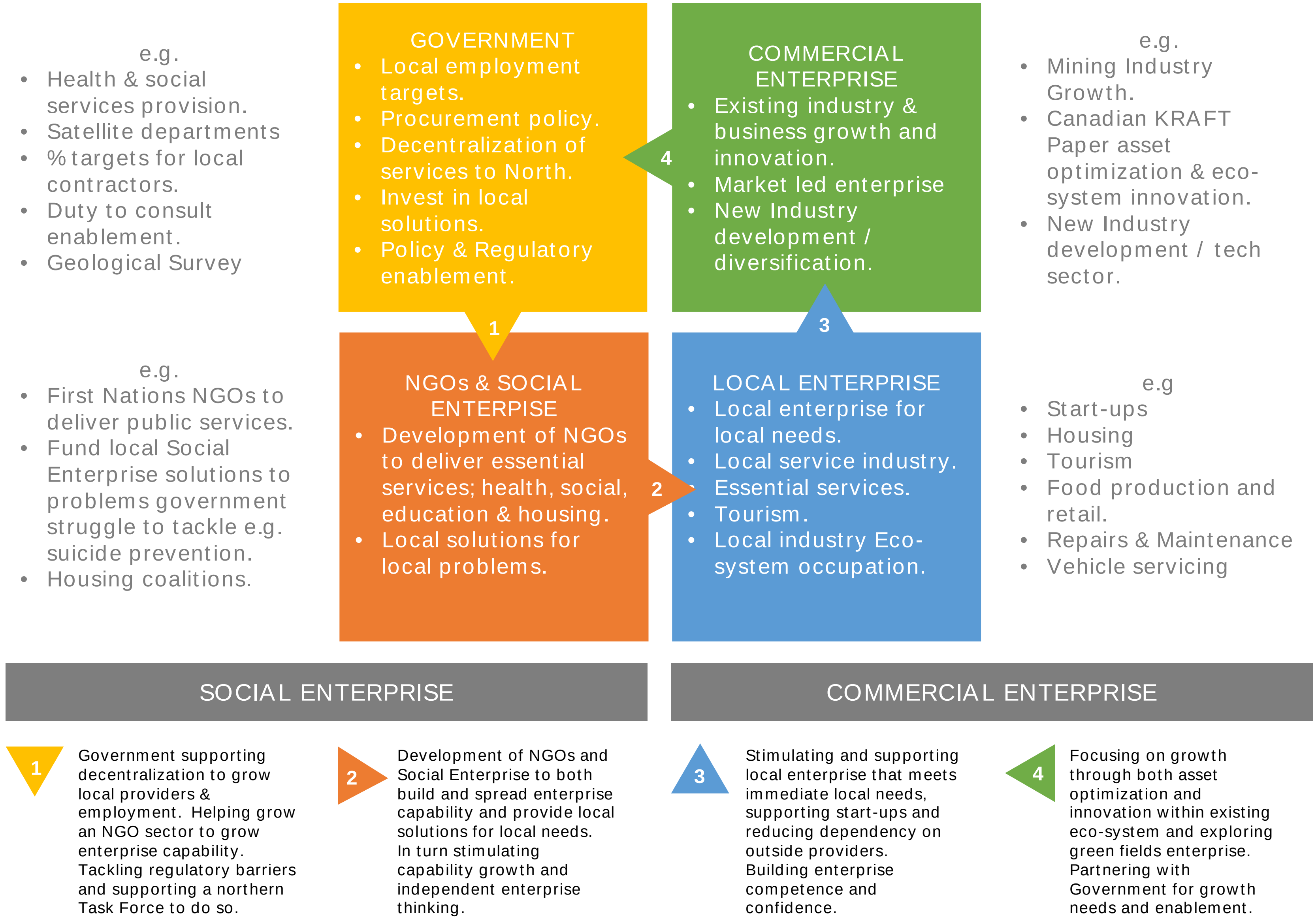
The key thing this review has highlighted is that the region is awash with strategy of varying degrees of action orientation, it also highlights the growing problem that needs solving with large industry decline coupled with large indigenous and youth population growth, and a growing income gap that will only grow further unless this trajectory is altered through timely effective intervention.

While many of the strategies allude to a need for more data to enable better strategy and decision making, many of them ignore the reality of who the ‘performing entities’ will be for implementation and their involvement in strategy formulation. So, while the region is awash with strategy, most of it serves to reinforce an over-arching picture of disconnects.

The majority of strategy reviewed is focussed on the ‘enablers’ of economic development, rather than the ‘doers’ i.e. those who will directly apply capital, resources and time into growth.

What this review has done is provide ‘food for thought’ in how a Northern Strategy might be framed as a companion to some of the other key programs and initiatives in the northern strategic landscape. In particular, it highlights four key areas of distinct need and opportunity; Government, development of an NGO & Social Enterprise Sector, support of Local Enterprise development for local needs, growth and innovation of existing major industries and green fields new market development. There is a clear dual enterprise need; social & commercial.

This dual social and commercial enterprise need is illustrated here as a framework with some system logic to it, as a basis for further exploration.



There are some top-line points worth noting from the marriage of the December 2016 meetings in Thompson, The Pas and Flin Flon, with the findings presented here from document review.

The current economic situation in the North is at a turning point and it should be recognized and treated as such, which means:

- Timely intervention is needed to alter its present course.
- Specific assignment or deployment of government personnel and resources should be part of the response, including;
- Establishment of highly action oriented Task Force's as required.

The framework as outlined in the previous page deliberately identifies four key areas of focus in alignment with evident needs:

1. The Government Focus must be on enablement through policy and regulatory review as needed and alignment of resources with need.
2. The development of a strong NGO and Social Enterprise Sector positioned to develop local level solutions for local needs through programme and service delivery innovation – assisted with decentralization of Government services to community based providers.
3. The stimulation and support of local private enterprise to meet local needs.
4. Support of existing commercial enterprise and industries to grow through partnerships, investment, alignment of government support, eco-system innovation, value add and new innovation including green fields development of new industries.

At the moment these distinct areas of focus tend to be lumped together in the strategic landscape which tends to lean towards social enterprise due to high needs, and has generally not engaged directly or identified specific growth opportunities on the commercial enterprise side.

The Look North agenda needs to ensure a strong focus on Commercial Enterprise and an enabling role on the social to balance out this picture.

The 'Social Enterprise' strategy feels strong so the development of a companion 'Commercial Enterprise' strategy makes a lot of sense and these two could work together, noting the current Social Enterprise Strategy is province wide, not just a North strategy.

Whilst there are no doubt many reasons behind the current trend of decline of the mining industry in Northern Manitoba, and the talk is swinging to talk of a 'post-mining' economy and 'economic diversification' – it is clearly still the greatest single industry with untapped potential and headroom for growth from a $1bn p.a. industry to a $5-10bn industry based on investment attractiveness and geological potential. It is an industry where the upfront investment in geological survey, prospecting and permitting determines how much of that potential can be actively realised and it would appear the effort and investment in that foundation has shrunk and is the root cause of much of the decline – coupled with increasing cost of compliance with increasingly stringent consent processes and environmental impact management and investment None of these barriers are insurmountable and the evident scale of potential in mining alone could fundamentally change the economic landscape of Northern Manitoba. If you are looking for a 'magic bullet' this industry that seems to have been consigned to history could yet provide the greatest future.

The potential of Social Enterprise and NGO development within First Nations in particular, fuelled by Government decentralization of services and funding, would build an enterprise platform for those communities. This has proven to be highly successful in New Zealand over the past 20 years.

Economic diversification is still a sound agenda and investment at the grass roots level in local private enterprise is essential to generate enterprise culture and 'start-ups' as a foundation to lead to long term growth.

If government can focus on its role as enabler and determine to align investment and resources with need, it will liberate much of this development.

3.1 SUMMARY OF DOCUMENT REVIEW FINDINGS

This table provides a summary quick 'snapshot' of findings distilled from the following more detailed sections of this report.

Section	Key Insights	So what?
Data	An economy with growing income and age gaps with an increasingly young and indigenous workforce.	Any strategy must have a deliberate focus on both youth and indigenous populations.
Strategy	A wide range of strategies reviewed. The most useful being; Social Enterprise, TEDWG, Mining Industry Association and Manitoba Hydro.	We need to ensure alignment and connection with these strategies is deliberate. In particular, there is scope to 'companion' the Social Enterprise Strategy.
Mining	An industry in decline with immense growth potential and opportunity requiring government enablement.	This is potentially the closest thing to a 'magic bullet' to transform the scale and value of the Northern Economy if the geological potential can be realized.
First Nations & Metis	This is a critical area of focus for the future of the North. There are clear needs and opportunities hindered by cultural and regulatory barriers.	This requires a significant investment by government to enable development and strong leadership by First Nations – but there are evident opportunities.
Tourism	This is a primarily domestic industry with evident export growth potential based on global trends, but no clear market responsive growth strategy.	There is nothing immediately evident that would suggest any specific focus in the Look North strategy, beyond what arises through workshops and an evident focus for Churchill and Thompson. There is potential in Indigenous Tourism that seems relatively unmentioned.
Trade	The identification of regional strengths and areas of focus is valuable with some clear growth trends.	This may need to be drawn upon as Northern Strategies emerge as a frame of reference.
Manitoba Hydro	Manitoba Hydro appears to be one of the most progressive Industries in tackling needs, such as aboriginal employment and First Nations partnership – as well as long term sustainable energy needs and cost reduction – with potential to reach further.	This may provide a model for other industries or sectors to emulate, including public sector, and presents specific agenda aligned with northern needs, particularly in First Nations, that with work on relationships could provide a path forward.
Other info	The Declaration of Values for the Boreal might provide a useful values framework for the northern strategy.	This might be a useful values framework for Look North.
Education	Education in the north requires a strategic approach.	The need is substantial and requires concerted response.

4.0 DATA

NAME	AUTHOR / PUBLISHER	DATE	DESCRIPTION	STATUS
2.1 Census Data		2015	Population statistics by Census Division	2 yrs old
1.2 TPOCNK REAP Report	Manitoba GET.	Apr 2015	Regional Economic Analysis Process Report. The Pas, OCN & Kelsey.	2yrs old

4.1 CENSUS DATA

Census data has been reviewed for following Northern census divisions:
19. North East Northern Region
21. Flin Flon and North West Region
22. Thompson and North Central Northern Region
23. Churchill and Norther Manitoba, Northern Region.

HIGH LEVEL OVERVIEW

CD 19. North East Northern Region: extends all the way across the province from west to east at near its middle, although the overwhelming majority of its territory is located in its eastern and south-eastern portions. It includes most of Lake Winnipeg, most of Lake Winnipegosis and the north basin of Lake Manitoba.

- **Strengths:** Mining & Construction
- **Unique strengths:** Metal Ore mining, highway, street and bridge construction. Non-metallic mineral mining and quarrying.
- **Emergent Sector strengths:** Transportation and warehousing.
- **Cluster Strengths:** Metal ore mining, non-metallic mining and quarrying, support activities for mining, and oil & gas extraction.

CD 21. Flin Flon and North West Region: Informally known as Flin Flon-Northwest, includes the northernmost portion of Lake Winnipeg (that portion north of the 53rd parallel north) as part of its south-easternmost section.

- **Strengths**: Manufacturing (metal processing), mining, Healthcare, Retail.
- **Unique strengths:** Non-ferrous metal (except aluminium) product, Production & processing, Metal ore mining, Universities, Pulp, paper and paper board mills, support activities for mining, electric power generation, transmission and distribution.
- **Emergent Sector strengths:** Construction, professional scientific and technical.
- **Cluster Strengths:** Hospitality and Tourism (Accommodation, Gambling, Retail, RV parks & rec camps), Mining (metal ore, support activities & for mining, oil & gas extraction, rail transportation), Paper & packaging (pulp, paper and paperboard mills). Non-ferrous metal (except aluminium) production & processing.

CD 22. Thompson and North Central Northern Region:

- **Strengths**: Mining, Healthcare, Education & retail.
- **Unique strengths:** Metal ore mining, electric power generation, transmission & distribution, non-ferrous metal (except Aluminium) production and processing, seafood product preparation and packaging.
- **Emergent Sector strengths:** Construction and mining.
- **Cluster Strengths:** Mining, Upstream metal manufacturing, electric power generation, transmission and distribution.

CD 23. Churchill and Northern Manitoba, Northern Region:

- **Strengths**: Utilities, Transportation & warehousing, education.
- **Unique strengths:** Electric power generation, transmission & distribution, Air transportation.
- **Emergent Sector strengths:** Manufacturing
- **Cluster Strengths:** Electric power generation, transmission & distribution,

So what?
All CD areas share some things in common while having some east to west and north to south trends. East to west extends from mining and forestry strength towards transportation & warehousing. As you head south, you find more strengths in processing and infrastructure in terms of power, construction and roading. What is evident is that while there are local variances in strength, they all overlap to some extent and while it makes sense to focus on local opportunities, there is also evident synergy in looking at the whole northern eco-system.

Opportunities
The report highlights some key opportunities in the following areas worth exploring:

- Making sense of inter-dependencies between areas.
- Working on existing strength profiles to look at it from a Northern Manitoba wide perspective in terms of understanding location and industry profiles – particularly in terms of employment trends.

4.2 TPOCNK REAP Report Apr2015

HIGH LEVEL OVERVIEW

- Growth in youth population 20-34.
- Growth also in the 55-60 year age group.
- Higher portion of people with trades qualification, but decline in primary industries.
- Income extremes relative to province i.e. larger numbers at the lower and higher end of incomes – significant gap.
- Changes in labour market have created supply-demand gaps. With decline in good producing industries there is now an over-supply of people in trades, particularly in manufacturing, forestry, fishing, hunting, inversely jobs in service industries in Tertiary sector have grown including accommodation and food with some decline in healthcare. This also generates some demand in transport and logistics to service these industries.
- Most of the current employment opportunities exist in Tertiary service industries meaning employees are travelling from outside of region into those industries.
- Mining, oil and gas remains important to the area despite trend of job losses.
- The availability of labour in trades and construction opportunity of growth in public sector also presents an opportunity.
- There is still opportunity in retail, in particular grocery stores, automobile dealers, electronics and appliances.
- Clustering presents opportunities in Forestry and Wood Products to gain market share and economies of scale.

So what?
The current trend is a swing from the production side of GDP to consumption. While this presents short term opportunities in service sectors, some of which attract government funding into the areas for service delivery, this is not a long term solution – it is one that feeds off a deficit model and merely recycles capital within the economy, rather than generating new sources of capital and revenue streams to grow the economy.

So while short term strategies might focus on opportunities in accommodation and food, and extend into provision of public services due to labour demand, they do not address the underlying need to build a production economy to fuel long term independence and prosperity.

Opportunities
The report highlights some key opportunities in the following areas worth exploring:

- Forestry & Wood Products: Clustering to gain scale, product value adding e.g. furniture, matching labour market skills & supply with latent capital & plant e.g. Canadian Kraft Paper Timber Mill & Machine Plant.
- Accommodation & Food: Aligning training to deliver strong hospitality industry.
- Retail & Services: Gap analysis to identify supply opportunities for local solutions / business.

5.0 STRATEGY

NAME	AUTHOR / PUBLISHER	DATE	DESCRIPTION	STATUS
3.1 Rural Economic Development Strategy	Association of Manitoba Municipalities	Jun 2016	Sets out strategy for creating conditions for growth.	Current

3.2 Economic Development Action Plan	TEDWG		An action focussed plan pivoting around the concept of developing Thompson as a regional 'service hub'.	Current
3.3 Northern Development Strategy	Manitoba Government	2000	A very wide ranging stock-take of areas of focus and activity in the North intended to guide Government.	Historic
3.4 Manitoba Cooperative Community Strategic Plan 2014-2019	Manitoba Govt, Manitoba Cooperative Assoc Inc, CDEM.		A strategy for developing and maintaining Manitoba's Co-operative Community.	current
3.5 Manitoba Social Enterprise Strategy	Co-created by Canadian Community Economic Development Network & Province of Manitoba.	Feb 2015	A strategy for jobs created through social enterprise.	Recent
3.6 TPOCNK REAP review	GET Manitoba. Agriculture, Food & Rural Development.	Sep 2016	Kelsey, Opaskwayak Cree Nation and The Pas Regional Economic Analysis Process (REAP) Review.	Recent

5.1 Rural Economic Development Strategy (REDS)

HIGH LEVEL OVERVIEW
Strategy identifies four key rural economic development strategies for Northern Manitoba:

- Industry diversification
- Youth retention
- Development of Social Infrastructure
- Business retention, expansion & succession.

Participants in REDS considered declining local population / market demand to support businesses, no dedicated resources to support economic development, complicated government systems and undefined or unclear local priorities to be the major barriers to addressing these priorities.

It identifies a changing rural workforce with an older age group moving on and an emergent youth population which is increasingly indigenous and immigrant. Agriculture, forestry, fishing and hunting are major industries but have been in decline while manufacturing grew 11% between 2001 to 2014.

While the strategy did have representation from the Manitoba Chambers of Commerce, a next step would be to further engage directly with key businesses, leaders and stakeholders in the rural sectors, as such much of the strategy focus appears directed towards Municipal and Economic Organizations. The four key identified areas of focus reflect this as they are all focussed on creating an environment for success. This now needs to be taken to the next level with specific growth opportunities within sectors e.g. there is no prairie productivity strategy, or agri-tech strategy.

It does highlight infrastructure issues – but requires strategy to address them.

The strategy sets some strategic targets for 2025:

- Increase population across rural areas by 150,000.
- Grow existing businesses in rural Manitoba by 20%.
- Increase the number of businesses by 3,000.

A next step would be to develop growth strategies for how these targets can be achieved beyond 7 strategies focussed on creating conditions for success:

- Coordinated evidence based planning.
- Strong leadership and organizational capacity within all regions.
- Supported entrepreneurs and successful businesses.
- Impactful, coordinated marketing and promotion.
- Diverse, dynamic skilled labour.
- Business friendly, flexible environment.
- Targeted investment.

So what?
The strategic areas of focus do not appear to be linked with any well-defined needs of rural industries, or problems they have that need solving. This has the feel of a policy framework document.

Opportunities
The primary opportunity appears to be around using insights gathered through the more direct approach of the Look North project to inform how some of the REDS might be implemented in practice.

5.2 TEDWG Economic Development Action Plan

HIGH LEVEL OVERVIEW

- The TEDWG plan is based on the positioning of Thompson as the "Hub of the North" and is consistent with findings from discussions in Thompson in December 2016 – with a focus on 'Thompson Unlimited as the 'Performing Entity'.
- The rationale provides a strong hierarchy of economic development opportunities to guide TU's allocation of resources:
    - Priority attention is given to what is needed in Thompson and Region in terms of goods and services. Local and regional demand for Thompson-based businesses is a direct and relevant driver for economic development and TU activity.
    - Investment retention and preserving and expanding the range of goods and services already in place in Thompson takes precedence over prospecting for investment in new industries from outside the Region.

- Investment attraction and retention that strengthen the linkages between Thompson and its Region are a priority.

- The 5 year Implementation plan focuses on three core service areas:
- Regional Service Centre: Responding to regional 'hub' needs and demands through establishment of services and formation of agreements.
- Winter Weather Testing: Expanding on existing activity and infrastructure to develop a 'centre of excellence'.
- Tourism: Trying to position as a regional service centre through place branding and service provision.
- Attracting Investment is also a key area of focus to implement the strategy.
- The document provides some useful data and regional mapping of road and hydro infrastructure and mining.
- The mapped reach of Thompson hub concept is extensive from Norway House to the south, Garden Hill South East, Shamattawa in the East. Fox Lake in the North and a link to Churchill, through to Split Lake up to Tadoule Lake and across to Lac Brochet in the North West down the western border almost to Pukatawagan across the northern Tip of Snow Lake. This is a large service area where infrastructure and access is mostly poor.

So what?
This is a sound, action-oriented plan with its own performing entity and focus. The Look North Strategy needs to 'dove-tail' with this and avoid clash or detracting from its focus, especially since it is the result of robust, long-term input from Industry and pragmatic approach.

Opportunities
The Look North Summits can be used as an opportunity to further extend upon the identified focus areas in the Action Plan, in particular, the stimulation of needs-driven enterprise in regard to the 'service hub' concept, although perhaps and liberate that thinking beyond geographic bounds e.g. tech sector, winter testing etc. are not regionally bound markets.

5.3 Northern Development Strategy 2000

HIGH LEVEL OVERVIEW

This early 2000 strategy, intended as a guide for government departments, identifies 5 key areas of priority:

- Transportation
- Health
- Employment & Training
- Housing
- Economic Development

It also identified that the governments of Manitoba and Nunavut had agreed to work together on mutually beneficial transportation, health, tourism, regional and community economic development, energy and resource management projects.

It identifies a number of projects on road and airport upgrades.

HEALTH

The health focus is on First Nations and remote communities with particular emphasis on diabetes, dialysis, suicide prevention, child health, adolescent pregnancy, dental health and creating recreational opportunities. Primary health focus is mainly on access to services. There is also a focus on developing human resource capacity in terms of training, recruitment and retention of workforce.

EMPLOYMENT & TRAINING

Education focus area is mostly on supporting students, strengthening public schools and college expansion, and training health care workers and child and family health workers.

Finding jobs and indigenous employment are priority areas – with a focus on Government employment in the high needs areas of health and social services, as well as education & training.

HOUSING

The strategy identifies a drastic shortage of housing pointing to housing conditions, insulation, ventilation and over-crowding in harsh climatic conditions as key issues with moisture and mould problems.

ECONOMIC DEVELOPMENT

Manitoba Hydro: Focus on lowering costs of power and increasing local employment supported by training.

Federal-Provincial Cooperation: Focus on gas services and retail projects.

CEDF: Focus on Capital for industry development and support for REDI and micro-enterprises.

Churchill: Focus is on Port improvements.

Aboriginal Communities: Notes projects in Casinos, 'Friendship Centres' and funding to First Nations and Metis organizations.

Natural Resources: Focus on Indigenous involvement in environmental protection and partnering on resource development.

Forest Diversification: Focus on expanding beyond wood products to commercializing other parts of the forest system e.g. mushrooms, berries etc.

Tourism: Adventure Travel and eco-tourism focus.

Mining: Provincial focus and investment in and through:

- the Mineral Exploration Assistance Program (MEAP)
- the Manitoba Prospectors Assistance Program (MPAP)

- the Manitoba Mineral Exploration Tax Credit (MMETC)
- the Manitoba Geological Survey (MGS)

Agriculture: Focus on developing forage crops and understanding agriculture potential of northern communities.

OTHER INITIATIVES

- Community Justice committees and support for community justice centres.
- Community based Child Welfare solutions.

So what?
The northern development strategy was largely an account of areas of focus as well of what was happening at the time. It is a very expansive document covering health, education, social, infrastructural and sector development – to the extent it is almost too broad to hold focus.

It would be fair to say it is a very inwardly focussed document and, like many of the documents reviewed, does not tend to generate new enterprise.

Opportunities
Little opportunity for Look North to connect with or derive value from this 17-year-old strategy.

5.4 Manitoba Cooperative Community Strategic Plan 2014-2019

HIGH LEVEL OVERVIEW

The strategy developed by partners Manitoba Cooperative Association, CDEM and Province, highlighted some key facts regarding cooperatives:

- Manitoba has over 400 cooperatives representing nearly every sector of the economy.
- In 2013, Manitoba had the fastest growing number of worker cooperatives in the country.
- That same year, the Manitoba co-operative retailing system was comprised of 4,500 employees and 385,000 members to whom it returned $386 million in the form of patronage dividends between 2008 and 2013.
- The Manitoba Credit Union system is comprised of 36 credit unions, and 1 Caisse Groupe Financier. The financial cooperative sector totals more than $24 billion in assets, and 625,000 memberships. Its contribution to Manitoba communities represents more than 17 million in profit sharing and about 4 million in donations, sponsorships, and scholarships.

- In Manitoba, there are 68 rural communities where a credit union is the only financial institution.

The first strategy 2008-2014:

- Introduced legislation for cooperatives.
- Established a series of reports and programs informing and promoting cooperative development.
- Delivered a website and other communications promoting cooperatives. www.manitoba.coop

This second phase strategy through to 2019 focuses on the following strategic objectives:

- To create a more supportive policy and financial environment for the establishment and operation of cooperatives.
- To foster better awareness and understanding of the values and principles of cooperatives.
- To improve infrastructure supports and services for cooperatives.
- To secure resources (financial and human) to sustain the Strategy.

So what?
While this strategy is clearly driving and promoting the formation of co-operatives, it has no clear rationale for why, nor what cooperatives it is seeking to establish e.g. where are the areas within the economy that would best benefit from use of a cooperative model? Usually Co-ops are formed to attain economies of scale and increase market profile and share – so which sectors would most likely benefit from that as an outcome?

Opportunities
There is no clear opportunity as yet for Look North other than should an evident cooperative opportunity emerge from the Look North Summits, then this will be relevant and provide a point of connection and support. Given the history within Manitoba and demonstrated willingness to cooperate, Co-op's may provide an opportunity for logically forming clusters around areas of focus for a Northern Economic Movement.

5.5 Manitoba Social Enterprise Strategy

HIGH LEVEL OVERVIEW
This strategy has been created by the Canadian Community Economic Development Network and Province of Manitoba with the objective of reducing poverty and promoting social inclusion by creating job opportunities for those facing systemic barriers to work.

The opening message of the document speaks of Manitoba's favourable economic growth position within wider Canada and lower unemployment rates, not speaking of the major disparity between Winnipeg and Southern Manitoba, with the North.

The strategy outlines six key pillars of social enterprise:

- Enhancing Enterprise Skills, particularly the marriage of commercial and social enterprise, through providing learning opportunities, business support and network connections.
- Ensuring Access to Capital and Investment, through start-up grants, post-start-up grants to offset early social costs to enterprise, loan financing and equity investments.
- Expanding market opportunities: from government procurement to support social enterprise e.g. housing, health etc.
- Promoting and demonstrating the value of social enterprise; through supporting financial analysis, raising awareness and creating forums.
- Regulatory framework: by creating a legislative and regulatory framework to support social enterprise.
- Networks and Community Engagement: through developing network hubs, providing wrap-around support to social enterprises by ways of existing government support services, developing job and career pathways in the social services sector.

It also promotes activation of internal trade agreements that foster social enterprise through government procurements.

So what?
This strategy is pragmatic and addresses the ‘local solutions for local needs’ agenda that permeates most Manitoba Strategies by giving the response a frame of reference as ‘social enterprise’.

Opportunities
This strategy makes a lot of sense in areas of health, housing, education, justice, welfare etc. – all significant issues in Northern Manitoba. A ‘Commercial Enterprise’ strategy could become a great companion to this as it would provide a framework for separating social from commercial agenda – while recognizing enterprise opportunities exist in both.

5.6 TPOCNK REAP review

HIGH LEVEL OVERVIEW
This report focuses mainly on the role of Economic Development Agencies.

It identifies main findings of the 2015 REAP as:

- Well educated skilled trades but lower educational levels on average.
- High income levels are growing (attractive to skilled workers, knowledge economy), although still below MB average in some cases.
- Income – 25% of region has household income of $100,000 and over and proportion of low income households has declined.

The presentation identifies the following next steps:

- Examine supply chains
- Examine regional opportunities in more depth (ex. meet with key business leaders to identify opportunities such as feasibility for wood product manufacturing).
- Examine opportunities in the knowledge sector (ex. provide business planning support to professional/scientific people).
- Look for new manufacturing opportunities (expansions or new investment).
- Look for new ideas where key sectors converge (ex. manufacturing construction materials from bio materials OR Tourism and education – training tourism operators, hospitality training, etc.).
- Look at ways to work better as a region (regional marketing, regional investment attraction, service sharing, etc.).

It does not provide any clear pathways forward, although it does suggest business investment strategies to focus on:

- Help business expand (business walks, formal Business Retention and Expansion projects, pathfinding for business resources ex. Commercialization Support for Business).
- Help build new (entrepreneurship, new business to start, business incubators, business plan support).
- Attract outside investment (ex. Foreign Direct Investment).

So what?
This is largely a presentation & report – it does not set any clear strategic development directions, however its threefold focus is a useful frame of reference i.e. business expansion, new business and attracting outside investment.

Opportunities
The three areas of investment focus could be included in the framing of Look North.

6.0 MINING

NAME	AUTHOR / PUBLISHER	DATE	DESCRIPTION	STATUS
2016-2019 DRAFT STRATEGIC PLAN	Mining Assoc. of Manitoba.	2016	3 Year Strategic Industry Plan	Current
Jan-Dec 2015 Annual Report	Mining Association of Manitoba Inc	2015	Industry Association Annual Report	Recent
Survey of Mining Companies	Fraser Institute	Feb 2017	Fraser Institute Annual Survey of Mining Companies 2016 providing investment attractiveness rankings	NEW

6.1 Manitoba Mining Assoc. 2016-2019 Draft Strategic Plan

HIGH LEVEL OVERVIEW

The Mining Association of Manitoba Strategic Plan 2016-2019 provides the following SWOT analysis:

Strengths

- Vast, untapped regions with high geologic potential.
- Excellent public geologic database.
- Low political risk.
- Good infrastructure to multiple known mineral belts.
- Established corps of prospectors, developed claims.
- Low-cost power.
- Growing First Nations interest in mining industry.

Weaknesses

- Uncertainty over work permit timeframes.
- High tax levels in every category compared with other Canadian jurisdictions.
- Mining is not seen as a high public policy priority in Manitoba.
- Ongoing attrition of current prospector corps without clear indication of new entrants.

Opportunities

- When commodity cycle turns, focus goes toward early-stage companies/projects. Investment tends to be rapid and frothy / speculative.
- Other jurisdictions such as Saskatchewan have shown that more focused permitting results in increased investment and also in improved relations with First Nations.
- Northern development / boreal planning processes.

Threats

- No clear end in sight for global slowdown, low commodity prices.
- Capital markets remain tight. Bay Street remains stretched for new investment capital.
- New park development initiatives and pending caribou strategy.
- Northern development / boreal planning processes.

The Association has also identified the following targets as the key determinants of success for mining in Manitoba over the next five years and encourages all Manitoba mining stakeholders to adopt, advocate and work toward the realization of these targets:

- 10% mineral tenure of the Manitoba land base (8.5% in 2005, declining to 2.0% in 2014).
- 10% exploration expenditures of national total (3.1% in 2016).
- 10% GDP from mining of Manitoba GDP (2.75% in 2015).

Strategic Priorities

The Association has identified the following five strategic priority areas as the key drivers for fulfilling the Vision and Mission of the Association and for achieving the targets identified in this plan.

- Safety & Mine Rescue: Providing expert leadership in the field of safety and health excellence for the mining industry and overall governance for the Manitoba Mine Rescue Program.
- Aboriginal Relations: Building relationships with Aboriginal leaders, listening to issues affecting Aboriginal people, communicating issues affecting the mining industry, and identifying common goals that can be pursued together.
- Competitive Regulatory Climate: Working collaboratively with government stakeholders to support industry's principal needs for secure and timely access to ground with high mineral potential and for a competitive tax and financial incentive landscape that will attract mining investors seeking fair returns.
- Communications and Advocacy: Developing and communicating key messages about the importance of the industry to the province and the policy directions supported by the Association.
- Education and Information Hub: Becoming the leading source in Manitoba for information on responsible, safe and sustainable mineral exploration and development.

So what?

The identified strategies are largely addressing sector wide issues, rather than specific growth or investment opportunities that are a focus for individual companies – so does not set out a clear growth agenda, however the ambitious targets allude to the relatively untapped potential of the industry which the strategy then seeks to liberate through areas like Indigenous relationships and improving the regulatory climate.

Opportunities

There is clear opportunity at a provincial level to continue to improve the regulatory and investment environment to grow the industry and to reconsider the level of investment into programmes to unlock that potential, including:

- the Mineral Exploration Assistance Program (MEAP)
- the Manitoba Prospectors Assistance Program (MPAP)
- the Manitoba Mineral Exploration Tax Credit (MMETC)
- the Manitoba Geological Survey (MGS)

The December 2016 meetings at Vale and Thompson and HudBay in Flin Flon suggested there has been a reduction in activity hurting the industry, particularly a reduction in the MGS and MPAP programmes, which is the grass-roots of the mining industry, creating the pipeline to growth.

6.2 Manitoba Mining Assoc. Annual Report Jan-Dec 2015

HIGH LEVEL OVERVIEW

The Report has a strong focus on Mine Rescue and Health & Safety issues, but also reports on future focus.

It makes a direct and simple statement on the conditions for a COMPETETIVE industry:

> *To build a successful mining industry, Manitoba requires a competitive regulatory framework, which includes equitable tax treatment relative to other Manitoba manufacturers and mining companies in leading Canadian mining jurisdictions; and, consistent application of all relevant policy and regulation. Areas of focus are:*
>
> - *Necessity of Land Access*
> - *Mining Tax Rates*
> - *Mew Mining Investment Tax Credit*
> - *Remove Barriers to developing inter-Provincial Mineral Belts*
> - *Increased resources for Manitoba Geological Survey*
> - *Limit PST Audit Cycles to 3 years (WCC, MCC, CME)*

It makes a similarly direct statement on the need for CERTAINTY:

> *To build a successful mining industry, Manitoba requires secure and timely access to land with mineral potential; a defined and transparent system of consultation and permitting which identifies participant roles, responsibilities and timelines; improved communication between government departments; and, consistent application of policy and regulation. Areas of focus are:*
>
> - *Manitoba Hydro Electricity costs*
> - *Process efficiency (permitting and consultation)*
> - *Regulatory consistency*
> - *Improve communications between government departments*
> - *Strengthen voice of industry in development or protected areas*
> - *Relief from work requirements until work permits are in place*

- *Northern Economic Development Strategy*

In regard to sector CAPACITY, it states:

> *Mining is the highest paid industrial sector in Manitoba, and as such, requires a highly capable, high performing, and highly skilled workforce. Helping to support workforce adjustment programs and ensuring training funding is targeted towards viable employment opportunities are ways that we can create and sustain jobs in our province. Areas of focus are:*

- *Workforce Adjustment (2018 Thompson, 2020 Flin Flon)*
- *Infrastructure / road & rail*
- *Workforce Training & Development / local level*

So what?
The report highlights an industry with a very clear development pathway, one requiring significant effort and enablement by Government if it is to be realized.

Opportunities
Government partnership needed to enable development.

6.3 Survey of Mining Companies

HIGH LEVEL OVERVIEW

The Fraser Institute annual survey is an attempt to assess how mineral endowments and public policy factors such as taxation and regulatory uncertainty affect exploration investment. Of note is that Manitoba has lifted from 6th to 2nd ranking between the 2015 and 2016 report, a significant gain.

Saskatchewan ranked top of the 104 jurisdictions surveyed with Manitoba placing 2nd.

The survey measures two key components of investment attractiveness; mineral potential and policy perception, with the score being weighted towards mineral potential.

Manitoba rated 2nd overall for mineral potential behind Saskatchewan in 1st, and rated 6th for Policy perception, with Saskatchewan weighing in at 2nd place behind the Republic of Ireland.

Manitoba appeared to be more attractive this year, based on the views of miners. The province's score improved by just under eight points and Manitoba is now ranked as the 6th most attractive jurisdiction in the world based on policy alone. This also marks the 5th straight year of improvement for Manitoba. This year, miners indicated that there was less uncertainty regarding the administration, interpretation, or enforcement of existing regulations (-15 points) and found the province's taxation regime to be more favourable (-11 points).

So put simply, Manitoba's Mineral Potential is still ahead of its policy environment while both are still strong within 104 Jurisdictions.

So what?
This report highlights the significant potential for growth in the Manitoba Mining Industry, particularly when you take into account the relative scale of the Industry compared to neighbouring provinces.

Opportunities
This report, coupled with the evident geology of the region and value of adjacent provinces, suggests there is significant head-room for growth in the mining industry – contrary to the recent trend of decline, which, anecdotally, can be linked to changes in regulatory, environmental, aboriginal and policy issues – not any lack of potential.

This Fraser report and the three years of consecutive improvement in ranking suggests a concerted effort and investment in growing the industry could transform the Northern economy.

6.4 Permit Times for Mining Exploration

HIGH LEVEL OVERVIEW
Permit Timeframes were revealed as a key issue for Mining in Northern Manitoba in December 2016 meetings. This Fraser Report looks at permit times across 20 Key Mining Jurisdictions, including 9 in Canada and the underlying causes / factors behind these.

Interestingly, Manitoba shows as having one of the best permitting times with 63% of respondents expecting permit times to be 2 months or fewer, and Manitoba is identified as only 1 of 2 jurisdictions were that timeframe has reduced with 38% of respondents indicating that permit times had reduced over the last 10 years. 50% of Manitoba respondents also indicated high confidence in the success of permit applications with only Saskatchewan being higher in Canada at 64%.

In terms of Manitoba performance and rankings in different areas of the permitting process, Manitoba ranked as follows:
2nd in terms of reduction in permitting times over last 10 years.

3rd in terms of receiving permits within 6 months.
5th in terms of permit timelines being met more than 60% of the time.
12th in terms of confidence of receiving permits.
15th in terms of transparency encouraging investment – or not being a deterrent.

So what?
The picture this paints is a positive one, while identifying clear areas for improvement.
Coupled with the latest Fraser index Ranking for Investment Attractiveness, this bodes reasonably well for the Industry, however, it is nonetheless an Industry currently in decline.

Opportunities
There is clear opportunity for improvement.

7.0 FIRST NATIONS & METIS

NAME	AUTHOR / PUBLISHER	DATE	DESCRIPTION	STATUS
Community based economic action plan for Northern Manitoba First Nations	Manitoba Keewatinowi Okimakanak Inc.	May 26, 2016	A ‘top-line’ list of areas of focus for Federal and Manitoba Government.	Recent
Metis Economic Development Strategy Final Report	Manitoba Metis Federation, Manitoba Govt, Canada. Report prepared by Lawrence Hobbs & Angela von Sicard, Chinook Solutions Inc.	Sep 2008	Sets out an approach to Metis Economic Development.	Old
The Duty to consult with Aboriginal Peoples. A patchwork of Canadian policies.	Ravina Bains and Kayla Ishkanian. For Fraser Institute.	May 2016	Takes stock of the performance by Canadian jurisdictions in giving effect to Section 35 of the Constitution.	Recent
Why First Nations Succeed	Fraser Institute. Tom Flanagan.	Nov 2016	Takes stock of evidence to find factors contributing to FN success.	Recent
Reconciliation: Growing Canada’s Economy by $27.7 Billion	National Aboriginal Economic Development Board.	Nov 2016	Report highlighting Aboriginal employment gap and opportunity cost.	Recent

7.1 Community Based Economic Action Plan for First Nations. Northern Manitoba.

HIGH LEVEL OVERVIEW
This high-level document identifies some key areas of focus for federal and Manitoba Government as follows:

FEDERAL:

- Existing Jobs Filled by Members of our Communities: seeking to provide training of FN to fill needs and target quotas.
- Healthy and Affordable Food: A call for government to combat diabetes by supporting and incentivizing locally grown healthy produce and supporting not-for profit social enterprise to grow and supply to communities.
- Diesel Fuel to Job-Creating Renewable Options: A call to shift from expensive diesel fuel to local sustainable energy solutions such as bio-mass, wood-chip or renewable energy. Financial and environmental costs of diesel too great.
- Energy Efficiency in Existing Homes: A call for INAC to break down barriers for FN access to Energy Efficiency programs and conversion to more sustainable solutions – including geothermal.
- Trash to Jobs: A call for support to 'clean up' communities due to accumulated waste and derelict cars with no waste disposal or management systems in place. In doing so, creating jobs.
- Home Construction: A call for supporting local housing solutions / options.

MANITOBA

- Drivers licensing: needed for job consideration. 75% of jobs require but 90% of adults have no license.
- Energy Efficiency Creates Jobs: Support for FNs to establish their own local sustainable energy solutions, such as Aki and Manitoba Hydro have done with 5 southern FNs to establish Geothermal energy.
- Community-Owned Wind and Solar Projects: A call for legislative change under the Hydro Act to include Feed-in tariffs for FNs and support wind and solar options at a community and household scale.
- Social Enterprise Work: A call for support of the 6 pillars of the social enterprise strategy, recognizing this as a model for FN development.

So what?
These strategies are very specific and very direct and point to the need for local solutions to fundamental human needs and through addressing issues of cost, sustainability and evidence a long term strategic mind-set vs short term solutions. It is also a clear call for Government to both help and support 'self-help' to build capacity and jobs in communities.

Opportunities
There is clear philosophical alignment here with the Social Enterprise Strategy and a clear appetite to address what is essentially a human needs based agenda through investing in and supporting local solutions.

7.2 Metis Economic Development Strategy

HIGH LEVEL OVERVIEW

This is a somewhat older strategy jointly developed by the province of Manitoba and the Manitoba Metis Federation. It has been reviewed in regard to top line areas of focus.

It is a somewhat lengthy and quite complicated strategic document laced with flow-charts, process and spider diagrams. It is largely about philosophy of approach and, as such, sets out an approach strategy to economic development.

The strategy identifies 5 areas of ‘strategic thrust’:

- Understand: Understanding the evolving opportunities and barriers to Métis economic development.
- Position: Positioning people, businesses and governance to take advantage of economic opportunities.
- Connect: Building and maintaining networks, relationships and partnerships and then using them for connecting workers and businesses with appropriate opportunities to pursue.
- Recognize...& Seize: Recognizing, anticipating and creating economic opportunities promptly and decidedly and coordinating actions to seize them.
- Stimulate & Support: Stimulating and supporting the start-up and growth of businesses and partnerships with both the private and public sectors.

It recommends 14 initiatives to advance the strategy:

- Define and Establish the Métis Economic Development Organization
- Evaluate MEDO Success and Performance
- Modify and Expand Small Business and Training Programs
- Identify, Analyze and Address Economic Development Support Program Gaps
- Create a Métis Business Directory
- Prepare a Métis Economic Development Communications Strategy
- Analyze Market Developments to Identify Opportunities for Métis Businesses
- Develop MMF Self-Funding Options
- Create a Métis Capital Trust
- Create a Métis Venture Capital Investment Fund
- Create a Métis Regional Economic Development Fund
- Improve Métis Uptake of Federal and Provincial Procurement Opportunities
- Expand the BizCoach Program

- Capital Market Training and Communications

So what?
As with most of the strategies reviewed in this report, this strategy does not identify any growth strategies, beyond providing conditions and support for growth. Adding key agendas and actions would help engage 'performing entities' i.e. the 'doers', rather than only the 'enablers' of economic development.

Opportunities
To provide some more tangible areas of growth focus.

7.3 The Duty to Consult

HIGH LEVEL OVERVIEW
This report was chosen for review as 'Duty to Consult' arose in a number of discussions in meetings in December 2016 across the North, as both an opportunity for, and barrier to, growth. It also clearly arose a point of confusion with calls for need for guidance, process, clarity and greater effectiveness.

It is worth noting that this report has been commissioned by the Fraser Institute and no similar reports or views have been reviewed from Government or First Nations, so comments here are only on this report without context of other views or inputs.

The report opens stating:

> *Section 35 of the Canadian Constitution states that "the existing aboriginal and treaty rights of the aboriginal peoples of Canada are hereby recognized and affirmed". In an attempt to provide greater clarity, the constitution defines "treaty rights" as rights that now exist by way of "land claim agreements or may be so acquired". It is through this constitutional provision that the duty to consult has been constructed by Canadian courts. The department of Indigenous and Northern Affairs Canada estimates that the legal duty to consult is triggered for some provinces over 100,000 times per year and for the federal government over 5,000 times per year.*

The report states that Manitoba is one of only 3 Canadian jurisdictions that does not state in their policies that aboriginal communities are required to participate in the consultation process, and further goes on to recommend that Manitoba needs to finalize their 'draft' consultation guidelines

Note: As reviewer I cannot confirm if this has since occurred or indeed which policies are being referred to.

It also goes on to recommend that Manitoba could outline the responsibilities of First Nations during the consultation process, to clarify expectations. It also recommends timelines are made clear considerate of FN capacity to consult.

Recommendation 4 is specific to Manitoba:

Recommendation 4: Manitoba could improve their process by including clear offloading provisions in their duty-to-consult policy and highlighting what, if any, procedural duties can be offloaded to project proponents in the consultation process.

While review of this report suggest some clear areas of need and focus, without reviewing other perspectives, no conclusions can be drawn.

So what?
Based on discussion undertaken in December in Northern Manitoba and this report, this is a clearly an area of focus that has the potential to hinder or enable economic progress as one warranting deliberate attention.

Opportunities
Ensuring there is clear and repeatable models and processes for this is essential and something to be explored further.

7.4 Why First Nations Succeed

HIGH LEVEL OVERVIEW
This report draws upon empirical evidence to identify key factors in success of First Nations. One of the key points of note is that the measurable progress achieved by First Nations is not a result of government programs, but rather from self-determination when First Nations take control of their own affairs and make the most of their own assets. It states:

The most effective government intervention has been legislation to remove roadblocks and create opportunities that First Nations can exploit under their own initiative.

It also notes that clearly proximity to a town or city brings opportunities that are not available in more remote areas, a key issue for Northern Manitoba FN Communities.

It identifies the basics of good governance coupled with clear strategy as visible traits of successful FNs.

So what?
The findings here support the direction of the Community Based Action Plan for First Nations, in that that plan focuses on FNs driving their own solutions, supported by Government.

It does suggest support should be provided in regard to Governance and Strategic Planning.

Opportunities
Government support FN development independence through removal of legislative barriers and support.

7.5 Government support FN Reconciliation: Growing Canada's Economy by $27.7Bn

HIGH LEVEL OVERVIEW
This report takes stock of First Nations rates of education and employment as a basis for calculating opportunity cost of under-FN disparities in terms of the gap between FN and non-FN statistics.

Put simply, it helps calculate potential of addressing the issue.

The summary table below highlights the impact and notes this opportunity cost to Manitoba as $729m p.a.

So what?
This simply highlights the necessity of unlocking FN potential.
.
Opportunities
The data supports this as a deliberate focus for the Northern Strategy.

8.0 TOURISM

NAME	AUTHOR / PUBLISHER	DATE	DESCRIPTION	STATUS
The benefits of Tourism	Travel Manitoba	2014	Snapshot of the value and scale of Manitoba Tourism.	Recent
Growing Stronger Together	Tourism North, Manitoba	2016	An investment attraction piece.	Current
Tourism Indicators	Travel Manitoba	2016	Visitor data.	Current

8.1 The Benefits of Tourism

HIGH LEVEL OVERVIEW
This report by Travel Manitoba provides a broad overview of the Tourism Sector value in Manitoba. It notes the 2014 value as:

- 2.8% of GDP (2014)
- Export revenue is $589.4 million (2014)
- Direct tourism job 12,900 (2014)
- Contributes $625.1m in Taxes by Tourism Wages and Expenditure (2014)
- 10,921 Tourism & Hospitality related establishments (2014 – grew 2% to 10,921 2015)
- Total Visitor Spending $1,603,368,000
- 87% of Visitation within Manitoba, 9% from other Provinces, 3% from USA and 1% Overseas.

So what?
The most out-standing thing in this picture is the ratio of internal domestic tourism vs outside of Province or Overseas, meaning that while that revenue is high, it is mostly recycling within the local economy, however the $589.4m of export revenue in substantial given relative scale of other industries e.g. Mining at $1bn.

Opportunities
Hard to ascertain from this information alone what opportunities might exist, however, it does suggest a focus on domestic tourism is probably first market for the north, except where iconic tourism beacons exist e.g. Churchill in terms of Polar Bears & Beluga Whales, which is globally distinctive.

8.2 Growing Stronger Together

HIGH LEVEL OVERVIEW
This publication from Tourism North showcases Manitoba Tourism with a view to investment attraction. It states:

> *Travel Manitoba is aiming to increase tourism expenditures to rank fifth among Canadian provinces by 2020.*

The document does highlight that 69% of all Manitoba tourist visits occur in the regions, outside of Winnipeg, however given 87% of Manitoba Tourism is internal domestic, this figure could simply represent Winnipeg residents leaving Winnipeg for a weekend away or holiday. The report does not provide detail on this.

It highlights the relative scale of the industry by indicating that it brings in more export revenue than wheat.

It describes what Tourists are seeking, however, how this has been identified is not described i.e. whether this is a generalization or based on visitor experience monitoring or surveys:

> *Tourism is changing. The vast majority of travellers are no longer just looking for a sunny beach to lie on for a week. Visitors to Manitoba, in particular, are looking for once-in- a-lifetime experiences that will envelop them in culture, authenticity, exploration and adventure, and create memories that will stay with them forever.*

It does allude to the fact Tourism is the 4th fastest growing industry in the world, pointing to head-room for expansion.

Like tourism anywhere, the majority of visitor spend is on transportation, Food & Beverage and Accommodation, in that order, which is a point of difference to many nations or regions where transportation is a much lower cost – however this particular report does not address that issue, rather it is painting the positive picture to attract investment, not the barriers or industry issues.

Perhaps the most insightful part of the report is the figures on the Northern region:

> *There are 176 tourism businesses in the Northern region that work in partnership with Travel Manitoba to promote our province as a tourism destination. Not only do these businesses provide visitors with a diverse selection of experiences and activities, they contribute to the quality of life for residents as well. There are 48 attractions in the region, 57 options for fixed roof accommodations, 26 parks (including campgrounds and RV parks), 38 lodges/outfitters, and 43 suppliers offering outdoor adventure experiences. The Northern region is also home to 50 festivals and events.*
>
> *The biggest spenders in the Northern region are overseas visitors. They spend an average $2,229 per person per visit, compared to $184 per person per visit for Manitobans. In total, there are 234,000 overnight visitors, which includes 185,000 from Manitoba. There are also 294,000 day trip visitors who come to the region. While the Northern region is a big draw for international tourists, many of the region's visitors come from surrounding areas to visit the hub communities of Thompson, Flin Flon, and The Pas. The number of regional visitors is fairly consistent year-round as they come for shopping, medical appointments, sporting events, festivals, etc.*

So what?
These figures do provide a strong rationale for a focus on overseas visitors, however, it would be interesting to understand from a global perspective which, if any, of the 48 attractions are globally recognized attractions. The report notes the 'star' attractions as Churchill, Heritage North Museum, Pisew Falls -

Kwasitchewan Falls, Sam Waller Museum, Snow Lake Mining Museum and Spirit Way. As an 'outsider' looking in, I would consider Churchill as the only globally recognizable attraction and potentially 'Spirit Way' as a distinctive proposition with the potential to become iconic. Every nation and region has Museums, seldom are they drivers of attraction.

The report does speak to the potential for growth in both domestic and international tourism, particularly out of Winnipeg, and with strong inter-provincial marketing adjacent provinces, and international with USA being the closest International market. It would appear strategy for domestic would focus on pax while initially a focus on International would focus on yields – as their current respective strengths, however, given the spend on transportation is high there may be basis for trying to increase bed nights per stay to increase yields but this requires the level of attractions and services to justify it.

Opportunities
There is no doubt that tourism, international tourism in particular, has head-room for growth and economic growth potential, however, there is no clear strategy to achieve that growth based on any visible robust market analysis.

Such a strategy is being developed for Churchill, perhaps that will start to generate a market oriented picture. In addition, the current development of a First Nations Tourism Strategy may highlight new opportunities or thinking.

8.3 Tourism Indicators

HIGH LEVEL OVERVIEW
These reports provide a number of metrics as indicators for Tourism, in particular focussing on:

- Visitor direct entries into Canada / Manitoba
- Inquiries
- Web Stats regarding page views etc.
- Accommodation occupancy
- Winnipeg Airport Traffic

While the data is interesting, it is not in itself of strategic value without trend information or understanding drivers of visitor decision-making or demand i.e. there is no qualitative measures or longitudinal information in the reports provided to pass on judgement on the figures being provided.

So what?
This information is of little value for Look North.

Opportunities
There is an evident need for more qualitative research or information – which may or may not be available, but has not been found or provided for this review.

9.0 TRADE

NAME	AUTHOR / PUBLISHER	DATE	DESCRIPTION	STATUS
International Trade Strategy for Manitoba	The Council on International Trade.	June 2011	Strategy prepared by the Council of International Trade.	6 years old.

9.1 International Trade Strategy for Manitoba

HIGH LEVEL OVERVIEW

This strategy document focusses on both inter-provincial trade as well as international, and seeks a private sector driven approach with collaborative support efforts from Government and other partners. It is premised on building on Manitoba's unique strengths and characteristics – and emphasizes the need to build SME trade capability.

It usefully sets out the value Manitoba's Top Ten trading countries (in 2006 & 2010) as below:

Table 1: Manitoba Domestic Exports to Top Ten Countries 2006 and 2010 (000s)

	2006	2010	2006 to 2010 Dollar Growth	2006 to 2010 Per cent Growth
United States (U.S.)	7,670,835	6,602,158	-1,068,678	-13.9%
China	430,968	670,375	239,407	55.6%
Japan	386,644	579,754	193,110	49.9%
Mexico	152,949	340,522	187,573	122.6%
Hong Kong	217,390	203,105	-14,285	-6.6%
South Korea	81,376	115,605	34,229	42.1%
Taiwan	101,612	98,548	-3,064	-3.0%
United Arab Emirates	26,827	97,929	71,102	265.0%
United Kingdom (U.K.)	71,731	87,537	15,806	22.0%
Bangladesh	12,302	81,899	69,598	565.8%
SUBTOTAL	**$ 9,152,634**	**$ 8,877,432**	**-275,202**	**-3.0%**
TOTAL (All Countries)	**$ 10,195,188**	**$ 10,294,879**	**99,691**	**1.0%**

Pg5

Whilst effected by the GFC of 2008, it shows only a 1% growth in trade over that period (of course noting this is now old data).

It provides a similar picture for inter-provincial trade showing Alberta and Quebec as key markets.

Table 3: Manitoba Interprovincial Trade Flows, Total Goods, 2007

PROVINCE	EXPORTS		IMPORTS		NET (1)	TOTAL TRADE (2)	
	(000,000)	% SHARE	(000,000)	% SHARE	(000,000)	(000,000)	% SHARE
East	3,908.0	56.0	4,828.1	49.1	-920.1	8,736.1	52.0
Newfoundland and Labrador	106.2	1.5	594.3	6.0	-488.1	700.5	4.2
Prince Edward Island	18.0	0.3	9.7	0.1	8.3	27.7	0.2
Nova Scotia	119.8	1.7	113.6	1.2	6.2	233.4	1.4
New Brunswick	100.4	1.4	78.5	0.8	21.9	178.9	1.1
Quebec	955.5	13.7	1,170.5	11.9	-215.0	2,126.0	12.7
Ontario	2,608.1	37.4	2,861.5	29.1	-253.4	5,469.6	32.6
West	2,999.8	43.0	4,993.9	50.8	-1,994.1	7,993.7	47.6
Saskatchewan	664.9	9.5	1,252.6	12.7	-587.7	1,917.5	11.4
Alberta	1,643.9	23.6	3,212.1	32.7	-1,568.2	4,856.0	28.9
British Columbia	691.0	9.9	529.2	5.4	161.8	1,220.2	7.3
TOTAL (3)	**6,974.2**	**100.0**	**9,825.2**	**100.0**	**-2,851.0**	**16,799.4**	**100.0**

Source: Prepared by the Manitoba Bureau of Statistics, Adapted from Statistics Canada, Cansim Table 386-0002.
November 8, 2010

Pg7

This highlights 36.5% of trade is inter-provincial to relatively close markets.

The report highlights Manitoba's trading strengths as:

- Geographical location in the centre of the continent.
- Transportation network and global supply chain capability.
- Significant immigrant population and the relationships they bring.
- Strong agricultural base with established trade corridors.
- Tradition of collaboration for the benefit of all.
- Diversity of products and sectors.
- A wealth of green natural resources.

Note: The report does not indicate whether these are strengths from an inside-out point of view, or an outside-in one.

It identifies key opportunities for leverage being:

- Education: particularly international students.
- Immigration: policies providing opportunities for inbound foreign investment, capability and skills attraction.

It reviews global trends and the position of Manitoba in relation to them, noting some highlights such as the opportunity for Manitoba to be a world leader in 'green energy; due to Hydro-electric power.

It identifies 5 core strategic objectives:

1 Enhance the awareness of Manitoba in international markets.

2 Increase the number of Manitoba SMEs engaged in international trade.

3 Diversify and increase Manitoba's international trade through growth into new markets.

4 Create an international trade culture and mind-set in Manitoba.

5 Enhance the leadership of trade development through the formation of public/private partnerships that can leverage the current trade expertise in Manitoba.

And 11 key strategic initiatives:

1 Centrallia 2010: Including launch of an international brand for SMEs.

2 World Trade Centre: Development of this in lieu of one existing.

3 Review and renew trade-related Memorandums of Understanding (MOUs): looking for opportunities to leverage existing agreements or develop new value generating ones.

4 Develop and implement market strategies for our priority markets.

5 Develop and implement an effective trade communications program.

6 Develop a comprehensive trade data system (with a specific focus on SMEs).

7 Develop an "export champions" program: to provide mentoring and advice.

8 Leveraging Major Projects: Notes return of NHL, Human Rights Museum and CentrePoint.

9 Cultural Trade Strategies: Leveraging the cultural diversity and connections of Manitoba population.

10 Export Consortiums: Partnering for markets and tendering opportunities.

11 Utilize existing trade-enabling entities: Maximizing support and investment available for trade development.

So what?
This is comprehensive document built on sound data, but is somewhat out of date so would be very interesting to obtain a progress report or more up to date data.

The identification of regional strengths and areas of focus is valuable and may need to be drawn upon as Northern Strategies emerge.

Opportunities
This may provide a valuable context and data for development of Northern based Trade related strategies – depending on ongoing relevance and progress of this strategy.

10.0 MANITOBA HYDRO

NAME	AUTHOR / PUBLISHER	DATE	DESCRIPTION	STATUS
2015-2016 Manitoba Hydro Annual Report	Mining Assoc. of Manitoba.	2016	Annual Report documenting performance. Key stats and objectives.	Current
Corporate Strategic Plan	Manitoba Hydro	Nov 2013	Sets strategic direction for Manitoba Hydro	Recent

10.1 Manitoba Hydro Annual Report 2015-2016

HIGH LEVEL OVERVIEW
The report provides a good current snapshot of Manitoba Hydro, opening with some key facts & figures:

Our service area in km² 650 000	Number of communities with natural gas service nearly 100	Total assets $19.8 billion	Number of generating stations 17*	Kilometres of distribution lines 68 000	Kilometres of transmission lines 18 000
Number of electricity customers 567 634	Number of natural gas customers 276 858	Total electricity capability 5 690 megawatts	Kilometres of natural gas lines 10 070	Number of Indigenous employees nearly 1 in 5	Total number of full-time employees 6 410

The report notes approximately 97% of Manitoba's electricity come from renewable Hydro-power and nearly 60% of homes heated by natural gas (which one would assume is most likely largely Winnipeg, not Northern remote communities)

Note: This contrasts to the use of diesel and less sustainable energy in remote locations, particularly by FNs, who do not enjoy the benefit of this.

The report highlights a couple of initiatives that could benefit the North, if they are not already:

- Introduced Power Smart for New Homes, a program providing incentives to encourage the use of innovative designs and energy efficient technologies by Manitoba's new home construction industry.
- Announced Power Smart Shops, a program aimed at lowering energy and water bills for small independent business across the province by providing free or low-cost efficiency upgrades and financial incentives.

It also highlights the major Keeyask project:

> *At the Keeyask Generating Station, a project being built in partnership with four First Nations – Tataskweyak Cree Nation, War Lake First Nation, Fox Lake Cree Nation and York Factory First Nation – the first concrete was placed in the fall of 2015, approximately six months ahead of schedule. When complete in 2021, Keeyask will produce additional renewable electricity needed to maintain a reliable supply for Manitoba.*
>
> *$6.5 billion – total estimated cost $2.4 billion – total spent to March 31, 2016 $450 million – total contracts awarded to Indigenous*

contractors/joint ventures 6 860 total hires to the project

- *85 per cent Manitoba residents*
- *54 per cent Indigenous persons*

As well as achievements against targets for Workforce management and Indigenous relations:

WORKFORCE MANAGEMENT & INDIGENOUS RELATIONS

Attracting, developing and retaining a highly skilled and motivated workforce that reflects the demographics of Manitoba is critical to our success. Engaging impacted Indigenous communities in a positive way is vital to enhancing working relationships. We continue to place emphasis on addressing the adverse effects of our operations, fostering an appreciation of Indigenous culture, developing and maintaining business relationships, providing opportunities in future development projects and implementing initiatives to recruit, develop and retain Indigenous employees.

MEASURE	TARGET	PERFORMANCE
Indigenous – corporate workforce	16%	18.2%
Indigenous – northern workforce	45%	47.5%
Persons with disabilities	6%	9.2%
Visible minorities	7%	8.2%

Such initiatives are a highlight when considering FN needs evident in the North and allude to the potential of such an approach to First Nations employment and partnership if this was applied across public sector in everything from health and social services, to procurement contracts.

So what?
While at a Provincial level it is evident Manitoba has good ‘green’ credentials and stats, it is evident not all Northern Communities reap the benefit from this when they are more remote or ‘off the gird’ which is a large portion of the Northern communities, particularly First Nations.

Initiatives like the Keeyask development and Workforce Management and Indigenous relations are a highlight when considering FN needs evident in the North and allude to the potential of such an approach to First Nations employment and partnership if this was applied across public sector in everything from health and social services, to procurement contracts.

Opportunities

There is evident potential if some of the identified opportunities and approaches Manitoba Hydro has to First Nations is extended to reach more remote communities that are 'off the grid', or adopted in wider public sector outside of Manitoba Hydro.

10.2 Manitoba Hydro Corporate Strategic Plan

HIGH LEVEL OVERVIEW

Manitoba Hydro identifies it top priorities as:

- Safety
- Financial strength
- Customer value
- Aboriginal relations
- Workforce management
- Protecting the environment
- Demand side management (DSM)

Within these strategies there are some key areas worth noting, relevant to issues arising through other strategic areas of focus and Look North meetings, as follows:

CUSTOMER VALUE

- "Keep the lights on and the gas flowing" with safe and reliable delivery of electricity and natural gas to customers through investment in existing infrastructure and system expansion;
- Assist customers in finding sustainable energy solutions to meet their needs, including fuel choice and energy efficient opportunities and thereby reducing their overall energy bills and impact on the environment;
- Provide predictable, fair and affordable rates for all Manitobans;

ABORIGINAL RELATIONS

- Address the adverse effects of our operations on Aboriginal communities;
- Continue to be a leading Canadian utility in Aboriginal representation through initiatives to recruit, develop and retain Aboriginal employees;
- Develop and maintain business relationships with Aboriginal businesses;

- Foster an appreciation of Aboriginal cultures in the workplace;
- Provide opportunities for Aboriginal participation in future development projects.

WORKFORCE MANAGEMENT

- Provide employee development programs to enhance employee technical, leadership and business skills;
- Maintain workplace diversity and inclusiveness programs;
- Align workforce planning with corporate priorities;
- Maintain leadership and technical continuity through effective succession planning;
- Promote Manitoba Hydro as an employer* of choice.

DEMAND SIDE MANAGEMENT

- These efforts assist customers in using energy more efficiently and result in overall lower energy bills.

So what?

The Manitoba Hydro Strategic Plan highlights a number of areas of strategic focus that Northern Manitoba can benefit from, if Northern Manitoba is part of solution development and strategic implementation.

The strategy show strong intent in some key areas of interest in regard to sustainable energy cost and efficiency, Aboriginal employment and partnerships and workforce development, however there has been no current performance information reviewed to ascertain how such initiatives are tracking.

Opportunities

The plan identifies a range of opportunities for the North, opportunities that need to be clearly articulated and 'front-footed' by Northern Leaders to optimise.

11.0 OTHER INFO

NAME	AUTHOR / PUBLISHER	DATE	DESCRIPTION	STATUS
Declaration of Common Values Boreal Development		15.11.02	A declaration of common values for the sustainable development of the Boreal Forest in Northern Manitoba.	Recent
Northern Region Economic Profile	EMSI 2015 & Manitoba Govt	2015	A graphic 'snapshot' of the northern Manitoba economy.	Recent
Maximising Manitoba's potential	Manitoba Research Centre	Jan 2017	A broad demographic overview from an economic perspective to identify areas of future research focus.	New

11.1 Declaration of Northern Values

HIGH LEVEL OVERVIEW

This ‘seven generation’ plan is about group adoption of some principles to ensure the long-term prosperity and benefit from the Boreal in Northern Manitoba – premised on a belief that the Boreal can be sustainably developed to create economic opportunity while assuring environmental sustainability.

‘Seven generation planning’ is about my grand-children’s, grand-children’s grand-children.

The agreed values are:

- Prosperity: The Boreal in Manitoba should be managed to provide long-term benefits for northern people and northern communities. These benefits must be defined by those people and affected communities, those who choose to invest in it, and the province at large.
- Balance: The future of the Boreal in Manitoba needs to balance development and the conservation of the environment. It must bring together in partnership the leadership of Indigenous and non-Indigenous Governments, and the public and private sectors
- Cooperation: All people in the north are served well by positive relationships between Indigenous and non-Indigenous communities, governments and those who choose to invest in the boreal region.
- Community Benefits: The Boreal should be managed with and for local communities, in constructive partnership with outside investors.
- Rights and Respect: All planning in the Boreal, both for conservation and for development, must respect the rights and aspirations of Indigenous peoples and those of non- Indigenous peoples.
- Financial Attractiveness: Plans for the future of the Boreal need to be clear and consistent, ensure environmental sustainability and social acceptability, increase certainty, minimize risk, and work to reduce the long-term cost of operating in the region.
- Knowledge: Communities need to be informed of the environmental values and economic potentials of the land.
- Clarity: A Boreal Plan needs to be clear, concise and easily understandable, with fully defined common goals.

So what?
This declaration was founded on wide reaching conversations and is referred to across many sectors and communities. As such, it has the potential to bind people around a common set of principles providing a frame of reference.

Opportunities
While this declaration was focussed on the Boreal, the principles are more widely applicable and transportable and has the potential to act as a creed across the North, not so much as a strategy, but as a point of common connection.

Again this review has not covered any update or progress report on the status of this declaration or support for it outside of its founders.

11.2 Northern Region Economic Profile

HIGH LEVEL OVERVIEW

This infographic provides a great snapshot of the Northern economy.

It identifies the Top Economic Drivers as mining, healthcare, manufacturing and education – interesting two areas on production side of GDP and two on consumption.

Healthcare and social assistance are the biggest employers.

The highest growth gains in jobs are in construction and mining with greatest losses in Agriculture and general administration and support and waste management.

It identifies the regions unique strengths as non-ferrous metal production and processing (except aluminium), metal ore mining, electric power generation, transmission and distribution, with emergent strengths in construction, transportation and warehousing, professional, scientific and technical.

Mining is still by far and away the largest 'business cluster' in that there are some 2,393 jobs in it at 2014 – however, we know there is a projected decline within the next 4 years of near 100 jobs.

Other clusters pale by comparison with <200 jobs in both building and construction products (182) and food and animal food production (111).

It also highlights the changing demographic noting for every 100 people retiring in the next 10 years, there will be 226 entering workforce age.

It also highlights quite high growth in average household income between 2005 and 2010 while also showing that growth as a growing disparity / gap between high and low income households which suggest the rich are getting richer and poor are getting poorer.

So what?

This report serves to reinforce most of the observations and findings covered elsewhere in this report, however, it really does highlight the growing problem that needs solving with large industry decline coupled with large youth population growth and a growing income gap that will only grow further unless this trajectory is altered through timely effective intervention.

Opportunities

This data can be useful when looking at the need for the investment of resources to grow the Northern Economy.

11.3 Maximising Manitoba's Potential

HIGH LEVEL OVERVIEW

This report provides a simple summary of its findings noting:

- Manitoba's demography will face significant changes between 2016 and 2040 resulting from the aging of the baby boom population, the influx of international immigrants to the province, rural-urban migration, and the growth of the province's Indigenous population.

- Three areas of future research are proposed for the Manitoba Research Centre, including a needs-based assessment of key public services, an economic analysis centred on enhanced Indigenous labour force participation, and regional benchmarking used to develop the business case for investment in the Winnipeg and Manitoba economies.

Perhaps the most note-worthy areas of the report are the focus areas on Needs-based Assessment of Key Public Services, Indigenous Labour Force Participation and Attraction of Business Investment, as noted:

> *Needs-Based Assessments of Key Public Services*
>
> *Given the impeding aging of the Manitoba population, needs-based assessments of critical public service programming, such as health care and education, are required to ensure consistent service delivery standards in the future. A bottom-up exploration of provincial health care needs would provide an important baseline for policy-makers as the aging of the baby boom generation unfolds and burdens the existing provincial health care system. Similarly, with the shifting industrial landscape in Manitoba increasingly favouring services-sector employment, it will be incumbent upon the province to determine the resourcing required to ensure the provincial education system is calibrated for optimal training of tomorrow's labour force.*
>
> *Economic Impact of Enhanced Indigenous Labour Force Participation*
>
> *Data from Employment and Social Development Canada's 2015 Aboriginal Labour Market Bulletin reveal significant opportunities to stimulate Manitoba's economy in the long term by mobilizing and engaging the province's substantial Indigenous population, whose average age falls below that of the general Manitoba population. Labour market indicators measured between December 2013 and December 2014 indicate a broad pattern of under-representation of Indigenous persons in Manitoba's labour markets. A promising avenue of further study would be to evaluate the enhancement to Manitoba's economic potential associated with increasing labour force participation rates among the province's Indigenous persons.*
>
> *Attracting Business Investment Through Regional Benchmarking*
>
> *Manitoba's economy, particularly the Winnipeg economy, is more diversified and able to weather recessionary shocks than urban centres in neighbouring provinces. Winnipeg was better able to withstand the adverse impacts of the 2008–09 global recession than many larger, heavily diversified Canadian cities. Urban Manitoba presents an attractive investment opportunity for the private sector, as it boasts considerably below-average costs of doing business relative to other North American jurisdictions. Conducting a city benchmarking report comparing Winnipeg (or other census agglomerations in Manitoba) to other North American cities would contribute to a strong business case for attracting long-term investment to the province.*

In relation to the Indigenous population in particular it notes:

- *Manitoba has the largest share of population of Indigenous persons in Canada outside the territories.*
- *Indigenous persons are heavily concentrated outside Winnipeg, with strong rural–urban divides between different Indigenous identity groups.*
- *The fertility rate of Indigenous women in Manitoba of 2.2 exceeds the provincial average of 1.6 for non-Indigenous women, supporting an abundant, young Indigenous population.*
- *By 2036, Manitoba's Indigenous population is forecast to reach between 273,000 and 335,000 people, representing between 17.6 per cent and 21.3 per cent of the provincial population.*

So what?

This report serves to reinforce a few key recurring points of focus and observation, in particular:

- Alignment of Public Services with Need with a particular focus on aligning training with industry needs.
- The focus on increasing Indigenous participation in labour markets as an area warranting very deliberate focus.

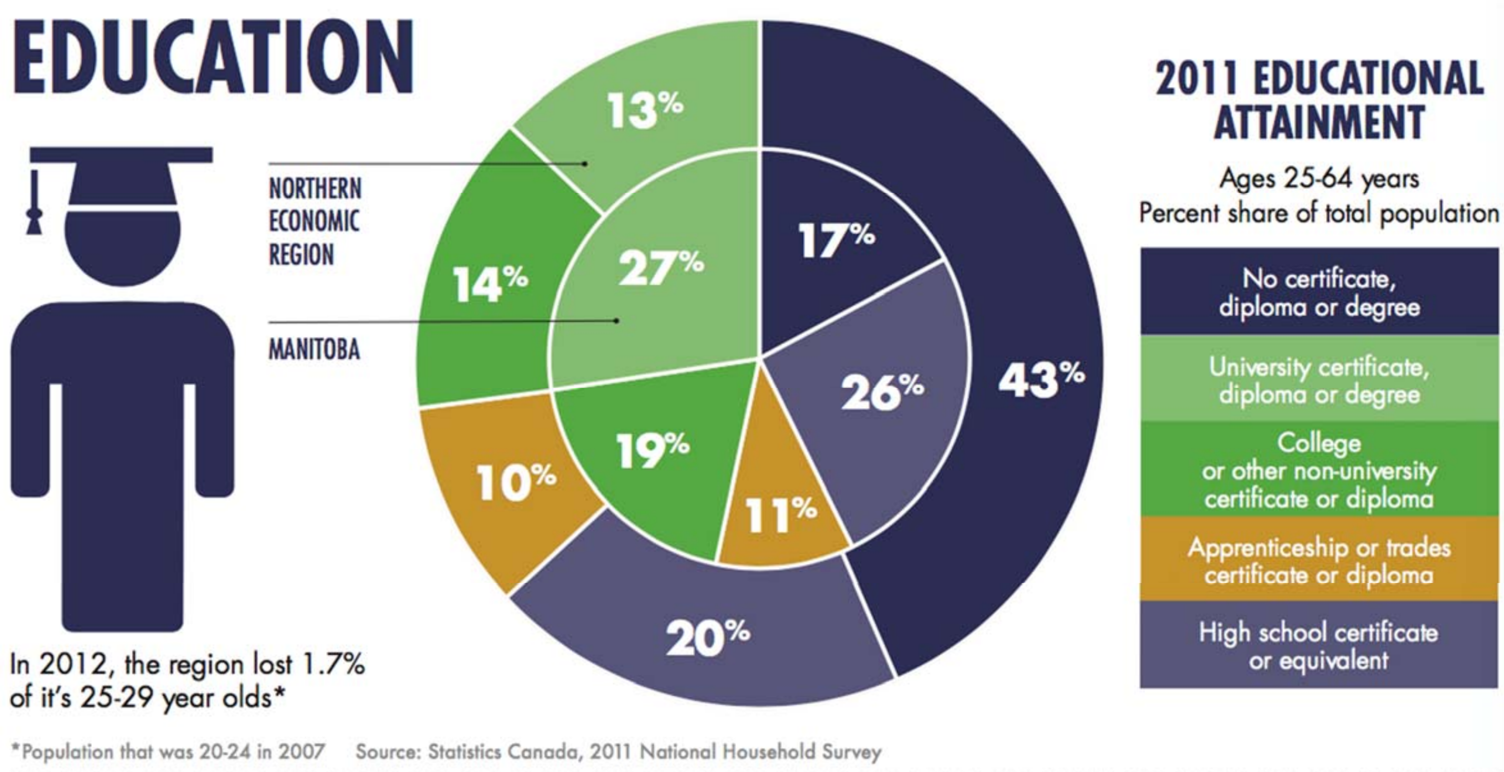
However, it also highlight an urban centred view of investment attraction, without recognising major key industries like mining being in the North.

Opportunities

The report does not present any immediate opportunities, but does reinforce and emphasis some critical areas of focus, particularly First Nations.

12.0 EDUCATION

The Northern Manitoba Economic Profile provides a very graphic portrayal of the disparity between Northern levels of educational attainment compared to wider Manitoba. It is a very concerning picture that warrants strategic response, however, no information has been easily found or provided for review.



Given clear capability needs to drive the Northern economy, there is a clear need and appetite top address this picture.

To date the best leadership appears to be coming from Industry through organisations like Manitoba Hydro and Key Mining Companies like Vale and HudBay who have development programmes in place and strategies like TEDWG where this is an explicit agenda.