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INTRODUCTION

In August 2004 The Nunavut Economic Forum (NEF) produced *Qanijjuq* after discussions held with Larry Bagnell, then Parliamentary Secretary for Indian Affairs and Northern Development, concerning Nunavut's economic development. Representatives of the NEF met with Mr. Bagnell in early 2004 following reports that a new economic development fund would be established for the three territories. This was subsequently announced in the federal budget as a five-year \$90 million fund. It is now referred to as the Strategic Investments in Northern Economic Development (SINED) program with \$30 million allocated to each territory.

Mr. Bagnell provided the NEF representatives with a series of questions about priority areas for investment and about the challenges and opportunities for economic growth. *Qanijjuq* was written in response to these questions, and builds on the priorities and objectives as laid out in the *Nunavut Economic Development Strategy (Strategy)*. *Qanijjuq* was formally presented to the Ethel Blondin-Andrew, then Minister of State for Northern Development, and Nunavut MP Nancy-Karetak-Lindell at a meeting with the NEF in September 2004.

As a continuation of this and other work to influence the expenditures made under the SINED program, the NEF became involved in the development of the Nunavut Investment Plan, announced in November 2005. This plan is based on the objectives of the *Strategy* and provides the direction for spending under the program.

Although some things have changed since *Qanijjuq* was released in 2004, many of the challenges and opportunities have remained the same. This reprint is made worthwhile by this continued relevance and it provides a significant amount of information for those interested in economic development in Nunavut. It is a companion document to the *Strategy* and the *Nunavut Economic Outlook* and its updates.

The document and its table of contents are laid out using the questions asked in the guide provided by Mr. Bagnell, which is included under Appendix A. The questions and responses are grouped in priority areas under such headings as Physical Infrastructure, Capacity Building of Human Resources and Small Business Support. In some cases, the responses are broken down under sub-headings such as Mining and Fisheries in order to organize the answers to broader questions.

Qanijjuq is also available in electronic format in the resource library found at www.nunavuteconomicforum.ca.



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EXECUTIVE SUMMARY

Nunavut is in a unique socio-economic position compared to other regions of Canada. Approximately 85 per cent of Nunavut's population of 29,000 are Inuit—by far the highest share of Aboriginal people of any province or territory in Canada. Nunavut has the highest natural rate of population growth in the country. This has resulted in the youngest population in Canada with the median age of 22 years compared to 37.6 for the nation as a whole.¹ Unlike most other parts of Canada, the majority of residents in Nunavut (67.5 per cent) live in rural communities compared to the national rate of 20 per cent.

Apart from demographic differences, there are physical differences that create unique challenges for the territory. Nunavut is home to 25 communities, all of which are isolated from each other and to southern Canada. This means that each community has a certain level of independence with associated infrastructure. An airstrip, power plant, health centre, RCMP detachment, post office, hamlet office, and school are needed in each community despite the small population base. Most communities are not established around a large industrial activity that contributes to society's economic and social development. Meanwhile, the Arctic environment has a dramatic impact on the economy, social well-being and the culture and values of the people who live there.

Nunavut is not without economic opportunities. Mining, fishing, tourism and the arts and cultural industries offer Nunavummiut opportunities to grow and diversify their economy.

Nunavut lands are rich with base and precious metals as well as oil and gas reserves. Three new mines are currently in the works, and recent discoveries suggest further development could occur in the near future. With the confidence of the signed Nunavut Land Claims Agreement (NLCA), Nunavummiut are assured that these mines will bring direct and indirect employment and guarantee some control over the decision-making processes.

Nunavut's fishery is also on the verge of expanding. A recent agreement signed with the environmentally safe multi-geared fishing vessel *MV Inuksuk* will bring Nunavummiut increased participation and control over their marine resource. Plans for more education and training for local fishers were developed and proposed to the federal government. Meanwhile, work is underway to secure fair access to the fish stocks in waters directly adjacent to the Territory.

Tourism, along with the arts and cultural industries, offers considerable long-term potential in Nunavut. Nunavut is home to a unique culture and geography that attracts people from around the world. Growth is possible in the adventure, cultural, ecological, and sports tourism markets as well as the

¹ The median age refers to the age in which half of the population is over and the other half under this age.



cruise ship industry, all of which provide a wide variety of employment and business opportunities.

Preventing Nunavut's performance from reaching its potential are critical gaps in infrastructure, human capital development and scientific knowledge. The Territory is plagued with a long-standing infrastructure deficit that leaves its valuable resources stranded. Without road access to the Territory's interior, mineral exploration is limited to coastal regions. The lack of marine infrastructure limits the size and capacity of Nunavut's fishing fleet, while poor municipal and cultural (arts and interpretative centres) infrastructure is holding back expansion of the tourism industry.

Meanwhile, investments are also required to enhance Nunavut's human capital. Nunavut has a real chance for prosperity when its economic potential is coupled with its young and growing population. However, without adequate education and training, these youth will be unable to fully participate in local developments. Such a result would be devastating to Nunavut's society, and will leave the Territory heavily dependent on financial support from the federal government. Children growing up in the Territory should expect access to opportunities equal to other children in Canada. They should be provided quality education, be given a safe environment in which to grow, and be afforded the opportunity to become productive citizens in their own community.

Knowledge and information gaps in a number of areas also impact Nunavut's development. A lack of adequate geological mapping slows exploration work, which limits the growth in the mining industry. More information is needed on wild game and marine species to ensure their commercial development is sustainable and does not jeopardize subsistence activities. Far more information is needed on environmental matters, such as climate change, water quality, and pollutants since Nunavummiut are particularly vulnerable to any environmental degradation given their geographical location and subsistence activities.

Broad-based investments across Nunavut's society, including its physical, human, environmental and natural capital, are needed to bring about positive and long-lasting growth and prosperity. Some of the proposals currently at the discussion phase include a deep-sea port at Bathurst Inlet and a road into the mineral-rich Slave Geologic Province, and major upgrades to community small craft harbours. In addition, many in Nunavut believe housing is the investment area that transcends all other needs. Estimates suggest demand for new housing is growing at a pace of 250 units per year²—a figure that does not include current shortfalls—and yet, the annual additions to the existing stock of houses is falling well short of this mark. Quality of housing influences how people perform at school or on the job; it affects the way they interact and

² Nunavut Tunngavik Incorporated, *Presentation to the House of Commons Standing Committee on Aboriginal Affairs* (April 16, 2004).



affects the quality of their health. Poor housing is linked to negative social outcomes, such as substance abuse, family violence and suicide, as well as poor health conditions resulting from inadequate air quality and the spread of disease. A comprehensive housing strategy will alleviate the housing shortage over the long term, while bringing about immediate opportunities for employment and business development.

The unique challenges facing Nunavut's economy are especially apparent in the Territory's small private sector. Entrepreneurs in Nunavut face high labour costs and must compete with the public sector for talent. The small local market limits business growth, which restricts the ability to raise capital and compete for large government tenders. Inadequate telecommunications and transportation links limit growth outside community or regional markets. Small business would benefit from broad-based investments that strengthen the labour pool, add much needed municipal and commercial infrastructure, improve the level and extent of information available on economic opportunities, and attract more visitors to the Territory. Entrepreneurs will also benefit from the NLCA, which ensures they are included in any future industrial development.

Nunavut has a plan to address its capital deficits. In 2003, officials from government and non-government organizations, and representatives from communities, the private sector, elders and youth came together to develop the *Nunavut Economic Development Strategy*. This *Strategy* established a common set of goals and priorities for the entire Territory to work toward. It promotes greater cooperation between organizations and coordination of their investment plans. It is this unified vision of Nunavut's future that allows Canadians to be confident that their investment dollars will produce positive economic, social and environmental returns.

The demographic, infrastructure and societal situation in Nunavut is not unlike Canada in the 1950s and 1960s. Nunavut is in the midst of its own baby boom. Its population is primarily rural. And, as can be seen in this Response, Nunavut requires considerable investments in the infrastructure fundamental to its economic, social and environmental success, as well as investments in its new public programs and institutions, to ensure that its young people can grow up in healthy, safe communities with opportunities comparable to other Canadians. With these investments in place, we can be assured that Nunavut will grow and prosper.



RESPONSE TO QUESTIONS

GENERAL OVERVIEW

1. FROM YOUR PERSPECTIVE, WHAT DO YOU THINK ARE THE GREATEST ECONOMIC CHALLENGES CONFRONTING THE NORTH/NUNAVUT AS A WHOLE TODAY?

Nunavut is a territory with great potential. It is home to considerable untapped wealth in the form of mineral reserves, abundant fish stocks and wildlife. Nunavut is a land of striking scenery, rich in arts and crafts and home to a unique people and culture. Standing in the way of an equally rich economic outlook are critical barriers that prevent Nunavummiut from accessing these opportunities and achieving a high and sustainable quality of life as a result.

These challenges for Nunavut can be generally described as the need to build the foundation for an emerging economy and to generate greater participation of Nunavummiut in their own economic development. More specifically, this foundation must include dramatic improvements in the Territory's physical infrastructure, in its ability to produce a capable workforce from the young and growing population, in the acquisition of knowledge of the environment (including information on fish stocks, wildlife numbers and climate change), and in finding effective mechanisms to promote private enterprise.

As will be described in the answers to the remaining questions, and should become obvious to the reader, there are no simple solutions or "quick-fixes" for the challenges Nunavummiut face. We can attempt to prioritize one investment over another, but it should be understood from the outset that continued dialogue between the respective parties in Nunavut must continue in efforts to work toward solutions to as many of the challenges as possible.

2. FROM YOUR PERSPECTIVE, WHAT DO YOU SEE AS THE NORTH'S/TERRITORIES' GREATEST ASSETS, OPPORTUNITIES, OR STRENGTHS WITH RESPECT TO ECONOMIC DEVELOPMENT?³

The economic opportunities across Nunavut are extensive, but those showing the greatest promise over the next ten years include natural resource developments, including mining and fishing, and tourism, which is, in part, dependent on a vibrant arts sector and cultural industries.⁴

³ This question was interpreted as meaning: "Where do Nunavut's economic opportunities lie?" The answers have therefore focused on the economic sectors that are gaining the most attention in Nunavut. Alternatively, the question could have been interpreted as one focusing on less tangible assets and strengths, such as the Nunavut Land Claims Agreement (NLCA) and the young and growing workforce that could provide all future industry with ample employees. In the end, it was felt that these other areas are addressed through other questions, so have been deferred to the appropriate questions.

⁴ Adapted from the *Nunavut Economic Development Strategy*.



MINING

The Territory's mining industry is poised for a period of expansion over the next five years. There are encouraging prospects for diamonds, gold and base metals. The Jericho Diamond Project, Doris North Gold Project and Meadowbank Gold Project have all submitted applications to go into production. Newly confirmed diamond finds in the Melville Peninsula are especially encouraging. At least four new mines could be in production in Nunavut within the next ten years providing hundreds of jobs and adding hundreds of millions of dollars to Nunavut's economy. Nunavummiut are much more comfortable with the idea of mining now that there is a settled land claim that guarantees their inclusion in the industry.

Nunavut has proven oil and gas potential. In several places, oil appears on the surface of the land naturally; in the oil sands on Melville Island; as oil staining on limestone on Bathurst Island; and as oil and gas seeps in Davis Strait.

From 1961 to 1984, one hundred and sixty wells were drilled, resulting in nineteen significant discoveries. The known reserves account for five per cent of Canada's known oil reserves and fifteen per cent of known gas reserves. Combined, these reserves have an estimated value that exceeds one trillion dollars.

Unlike the NWT, all of Nunavut is covered by a single land claims agreement, and while largely untested, the *Nunavut Land Claims Agreement (NLCA)* should provide investors with greater certainty by providing a consistent and clear regulatory regime. The *NLCA* also contains strong provisions to help ensure that Inuit will benefit directly from mining development projects. It requires industry to negotiate Impact and Benefit Agreements with Inuit and with local communities for major development projects. Additional benefits will be realized in cases where mineral and hydrocarbon development takes place on Inuit owned land.

Mining offers more than direct employment opportunities. Expansions can take place in related service industries such as claim stakers, prospectors, geophysical contractors, diamond drillers, analytical laboratories, and environmental consultants. As the mining industry grows, these service opportunities should be seized, but they will require training and business support programs, as well as partnerships with non-Nunavut firms to prompt its growth.

FISHING

The fishing industry in Nunavut is based primarily on three species; turbot, shrimp and Arctic char. Some exploratory work is being conducted on the commercialization of such species as clams, scallops, cod and kelp; however, these are some years away from mass harvest.⁵

⁵ The Conference Board of Canada, *2002 Nunavut Economic Outlook* (Ottawa, 2002).



The overall outlook for the industry is promising. It currently provides more than 300 seasonal jobs and contributes almost \$9 million annually to the economy in wages and royalties. The potential exists for these benefits to be much higher. Fisheries directly adjacent to Nunavut's territory have a landed value in excess of \$100 million. The large discrepancy between the total value and the portion received by Nunavummiut exists because Nunavut does not have full ownership of the resources. Ownership of the fish resource is divided between Nunavut and southern-based fishing companies. If Nunavut were to acquire 85 per cent of the aquatic resource - a target that is currently being pursued - major economic gains could be achieved.

Ownership is not the only challenge facing the industry. Nunavut retains only a fraction (8 per cent) of the overall potential value of the catch. This is because Nunavummiut remain, to a large extent, observers rather than participants in the industry. Without an offshore trawler registered to Nunavut, southern fishers perform all offshore activity. In some cases, they are mandated to hire locals, pay royalty fees and offload portions of the catch at Nunavut processing plants. Nevertheless, Nunavut is losing many of the benefits from the industry. To increase its level of participation in the industry, Nunavut will require broad-based investment in infrastructure, training, knowledge, and organizational development.

TOURISM

Tourism is a critical component of Nunavut's economic future. The industry provides tremendous opportunities for diversification, attracts much needed foreign capital, and helps foster the preservation of the Territory's arts sector and cultural industries. It encompasses many areas including adventure, natural and cultural tourism, sports fishing and hunting, parks visits, and business travel.

The tourism sector is a good fit for Nunavut culture and communities. It builds on knowledge developed in the land-based economy. It supports and engenders pride in Inuit culture.

While tourism activity may change from year-to-year, it does not experience dramatic boom and bust cycles. It can and should be a community-based economic activity providing opportunities for people across the Territory to develop products and participate in the local economy.

The Canadian Tourism Commission has found significant evidence suggesting the tourism industry is shifting away from its traditional geographical approach to a more experiential product-cluster approach. Some relevant cluster areas for Nunavut include the adventure, learning or education, cuisine, and Aboriginal culture tourism markets.

For tourism to be an economic driver in Nunavut, investments are needed across all forms of capital, including the education and training of hospitality staff and tour operators, creating new and enhanced cultural and arts centres,



improving community infrastructure such as water and sewage treatment plants and waste disposal systems, and ensuring the preservation of Nunavut's natural environment.

ARTS SECTOR AND CULTURAL INDUSTRIES

Nunavut's image in Canada and in the world is formed almost entirely by Inuit artists. Other economic sectors and tourism in particular, depend on this image for business success.

From soapstone carvings to making feature films, the arts in Nunavut have demonstrated for more than 50 years that Inuit cultural activities can form the basis for viable economic activity. Nunavut's artists are now applying their craft in numerous and unique forms generating more than \$30 million in sales annually.

Many Inuit obtain their only earned income from creating and selling art. In the 1999 Nunavut Labour Force Survey, more than 4,200 persons - one in seven - identified themselves as "active artists". Since April 1, 1999, there has been steady growth in the number of young people participating in the cultural industries, not only as carvers, printmakers and weavers, but also as jewellery designers, graphic artists and performing artists.

The arts economy is a vital contributor to healthier communities. For some, it is a form of communication, self-expression and healing. Making art can foster self-esteem, promote learning and create cultural pride. It teaches discipline and encourages entrepreneurship.

A better understanding of the size, economic potential and needs of the arts economy and cultural industries is required, as is a concerted effort at product development and marketing. For growth to continue, investments in education, training and physical space are also required.

3. WHAT DO YOU SEE AS THE GREAT GAPS IN TERMS OF CURRENT INVESTMENTS IN NORTHERN ECONOMIC DEVELOPMENT? IN WHICH AREAS WOULD INVESTMENTS PROVIDE THE MAXIMUM IMPACT FOR NORTHERNERS?

As outlined under Question One, Nunavut's needs centre on developing the infrastructure that will support its economic opportunities, its growing population and the need to improve the participation of Nunavummiut. There is also a serious need to improve the understanding of scientific and traditional knowledge in areas of mineral reserves, fish and wildlife, and climate change. The success of the economic sectors identified in Question Two is dependent on investments in these areas.

It is difficult to accurately assess which investment would pay the most immediate returns and which would provide the greatest returns over time. Generally, it is accepted that investing in job creation has more immediate impacts than investing in education, but which is more important in the long-run could be discussed at length.



*A SEVERE INFRASTRUCTURE SHORTFALL*⁶

Infrastructure plays a role in every aspect of our society, including our economic, social and environmental performance. The consequences of poor infrastructure include:

- minimizing industrial opportunities and preventing citizens from fully participating in the economy;
- constraining social development (such as contributing to poor health and hindering healthy child development); and,
- contributing to environmental degradation.

To this end, there is a growing concern in Nunavut that the existing state of municipal infrastructure, or physical capital, is preventing the Territory from growing to its full socio-economic potential. In its 2001 *Nunavut Economic Outlook*—sponsored by the Government of Nunavut, Nunavut Tunngavik Inc. and Indian and Northern Affairs Canada—The Conference Board of Canada suggested that “the state of infrastructure in Nunavut is a serious problem that is affecting both the economic and social development of the Territory.”⁷

One can go from one major infrastructure category to the next, identifying substantial gaps that are preventing Nunavummiut from reaching their ultimate goal of a high and sustainable quality of life. Whether the discussion is on energy systems, transportation and communications, housing, municipal infrastructure, facilities for health, education and justice services, or community facilities, the concern is generally the same: systems are old or under funded and require upgrades or replacements. Some factors affecting Nunavut’s infrastructure are provided below.⁸

Demands on Nunavut’s infrastructure will increase: It was noted earlier that Nunavut has one of the fastest growing populations in the country. Growth among some of the communities was over 20 per cent between 1996 and 2001. This population increase has and will continue to place enormous strain on Nunavut’s infrastructure and ultimately the health and well-being of residents. Nunavut’s infrastructure is aging: some communities may appear to have the required infrastructure but this infrastructure has a diminishing lifespan and will need to be replaced.

⁶ This Section is based on the report, “Infrastructure Planning for Nunavut’s Communities,” produced for the Nunavut Association of Municipalities by the Conference Board of Canada (December, 2003).

⁷ The Conference Board of Canada, *Nunavut Economic Outlook: An Examination of the Nunavut Economy* (Ottawa, 2001).

⁸ Draft report “Sustainable Infrastructure: Making the Socio-Economic and Environmental case for Infrastructure Investment in Nunavut,” from the Inter-departmental Committee on Capital Planning, Government of Nunavut.



THE IMPACT OF CLIMATE CHANGE

Climate change can have significant repercussions not only for Nunavut's natural capital but for its physical capital as well. For example, rising water levels may threaten homes. Some Alaskan communities are already considering relocating due to rising water levels. In many instances, the Arctic ecosystem experiences the first signs of environmental change before other Canadian communities.

MEETING CHANGING LIFESTYLES, EXPECTATIONS AND NATIONAL STANDARDS

Like other Canadians, many Nunavummiut are changing their lifestyles and tastes. This is leading to higher expectations in the quality of services provided that will add further pressure on Nunavut's infrastructure. At the same time, Nunavut will be increasingly expected to meet national standards across the range of municipal services provided. Prioritizing the needs in just infrastructure alone is a considerable task; one that is being worked on within the Government of Nunavut through the Inter-departmental Committee on Capital Planning, and by the Nunavut Economic Forum.

HUMAN CAPITAL DEVELOPMENT

The need to develop Nunavut's human capital was identified in the *Nunavut Economic Outlook* as a serious priority. Nunavut has a young population that offers great potential. While improving, Nunavut's levels of education and employment skill still rank low compared to populations in other Canadian jurisdictions, and improvements must be directed toward narrowing this gap.

A closer investigation reveals a number of disturbing social indicators, whether one looks at basic education, health status, crime rates, family violence or suicide. Nunavummiut rank amongst the lowest performers in many of these categories. The impacts of these outcomes will span generations if not fixed.

A key feature of Nunavut's population is that approximately one half of Nunavummiut are under the age of 20. This young population presents both challenges and opportunities for Nunavut. The challenge is to ensure that the public programs in place provide them with the education they require upon graduation, and to foster growth within the economy in order that jobs are available as they join the workforce. The opportunity is that these youth represent Nunavut's future. Just as the Baby Boomers have shaped Canadian and American society, the youth of Nunavut will do the same in that region. A positive, productive and culturally sensitive generation stands to transform Nunavut into a modern and growing society. The importance of ensuring this generation has a productive future in Nunavut and that they are ready, willing and able to participate in it cannot be overstated.



ENVIRONMENTAL KNOWLEDGE (MINERALS, FISH, WILDLIFE, CLIMATE CHANGE)

The 2001 *Nunavut Economic Outlook* and its subsequent update in 2002 show that there are concerns with existing levels of knowledge in the areas of geographical and fisheries science as well as in the status of wildlife populations.⁹ Acquiring greater knowledge of Nunavut's natural capital is essential to support both traditional economic activities and new ones such as commercial fishing, food processing and tourism. The future of both activities depends on the preservation of Nunavut's wildlife.

The *Nunavut Economic Development Strategy* outlines some of the areas where environmental data is lacking. Important knowledge gaps exist in areas such as wildlife population, habitat health, integration of formal scientific knowledge and Inuit Qaujimaqatugangit¹⁰, and the assessment of cumulative impacts.

Under Article 12.7.6 of the *NLCA* there is a requirement for government to monitor the long-term condition of the ecosystem and the socio-economic environment of Nunavut. The implementation of this obligation is essential to Nunavut's economic future.

PHYSICAL INFRASTRUCTURE

4. GIVEN THAT FEDERAL AND TERRITORIAL INVESTMENTS ARE AND WILL CONTINUE TO BE MADE TO IMPROVE PHYSICAL INFRASTRUCTURE AT THE MUNICIPAL LEVEL (INFRASTRUCTURE CANADA PROGRAM AND MUNICIPAL RURAL INFRASTRUCTURE FUND) AND MORE BROADLY AT THE STRATEGIC LEVEL THROUGH THE CANADA STRATEGIC INFRASTRUCTURE FUND, ARE THERE OTHER INFRASTRUCTURE PRIORITIES THAT IN YOUR OPINION STILL NEED TO BE ADDRESSED? (E.G. TELECOMMUNICATIONS?)

There is a real need for Nunavut to put in place the necessary municipal infrastructure as well as upgrade existing systems that are under considerable strain from overuse. But as suggested by the question, Nunavut's infrastructure needs do not stop there. As detailed in the first three questions of this response, Nunavut's lack of infrastructure is stranding resources, limiting export potential, lowering benefits of existing economic activities, and is severely impacting communities' abilities to participate and take full advantage of current economic opportunities.

Telecommunications is another example of underdeveloped infrastructure across Nunavut.¹¹ Information technology and broadband communications have great potential benefits for Nunavummiut. Investment at the community level

⁹ The Conference Board of Canada, *Nunavut Economic Outlook: An Examination of the Nunavut Economy* (Ottawa, 2001 & 2002).

¹⁰ Inuit Qaujimaqatugangit refers to Inuit traditional knowledge.

¹¹ This section adapted from the draft report, *Sustainable Infrastructure: Making the Socio-Economic and Environmental case for Infrastructure Investment in Nunavut*, Inter-departmental Committee on Capital Planning, Government of Nunavut.



in information technology and broadband communications systems will enhance productivity in Nunavut by helping to overcome the Territory's geographical isolation and barriers to information flow.

Nunavut relies exclusively on satellite networks for its bandwidth needs. This is many times more expensive than land-based, fibre optic or microwave relay bandwidth found in the rest of the country. Currently the Government of Nunavut invests at least \$10 million annually to ensure bandwidth is available for telehealth, distance education, and the operation of government e-mail, financial, and human resources systems. Excess bandwidth is available for other community uses, such as the operations of the municipal government, e-commerce, and personal use. However, these uses are expensive, either because they require long distance dial up connections, or because the local service provider is forced to charge high fees - \$100 per month for private use is typical - to defray bandwidth cost.

The major barrier to broadband networks in Nunavut is the high, on-going cost of satellite bandwidth. In other jurisdictions with roads and railways, the major investment for broadband networks is fibre optic or microwave relay infrastructure. After the infrastructure is in place, the actual cost of bandwidth is low. In Nunavut, the opposite is true—land-based infrastructure accounts for about 10 per cent of the total cost of data, Internet and telephone network connections, while 90 per cent of the cost is operational, or the ongoing cost to purchase satellite bandwidth.

The recently announced National Satellite Initiative providing funding over the next 10-15 years to lower the cost of broadband for communities in the north will help with ongoing satellite access costs, but does not address the initial infrastructure needs. Public investment in bandwidth will have to be approximately \$50 million dollars over 5-10 years if Nunavut is to close the "digital divide."

5. ARE THERE PARTICULAR PROJECTS THAT WOULD PROVIDE MAJOR DIVIDENDS? (E.G. A ROAD TO A RESOURCE RICH REGION, A HYDRO-ELECTRIC PROJECT, ETC.)?

We have interpreted "dividends" to mean "economic returns to Nunavummiut," and have kept the focus of the answer on resource development areas.

ACCESSING STRANDED RESOURCES

As suggested earlier, one of Nunavut's most significant areas for economic growth in the next five to ten years will be in natural resource development. An issue facing the mining sector is access to stranded resources in Nunavut's interior. This case has been highlighted by proponents for the Bathurst Inlet Port and Road (BIPR) Project [Nuna Logistics Ltd. and Kitikmeot Corporation], which recommends the construction of a port and storage facility at Bathurst Inlet located east of Kugluktuk on the Arctic Ocean, and an all-weather road



into the Slave Geologic Province (the geographical section of land in the Kitikmeot Region extending south from Bathurst Inlet to close to Yellowknife, NWT).

This road would open up exploration of the region providing prospectors and junior mining interests an opportunity to explore and potentially develop base-metal mineral deposits in the area. The significant reduction in construction and operating costs that a road would deliver would also alter the economics of mineral deposits that are unprofitable without all-weather road infrastructure. And with the new regulatory bodies in place, Nunavummiut have greater assurances that they will be the primary benefactors from any mineral development that the major project brings.

PARTICIPATION IN THE FISHERY

A single major investment in the fishing industry that would match the magnitude of a port and road project is more difficult to identify. This industry's investment needs are more broad-based.

Surprisingly, Nunavut has little to no marine infrastructure, despite having so many coastal communities dependent on shipping to receive their essential supplies, and the longest shoreline in Canada. With the exception of the old Nanisivik mine site, there are no ports and no small craft harbours. Marine infrastructure in Nunavut consists of barge push outs, beach landings, small docking structures and breakwaters. Adequate docking facilities would serve many purposes in Nunavut, including:

- to support fishing for subsistence purposes;
- to support commercial fishing and processing of fish and marine resources; and,
- to support tourist and recreational purposes.

Despite the potential benefits, base funding to construct marine facilities does not exist in Nunavut at the moment.

The Territory will also benefit from an offshore multi-gear vessel capable of harvesting shrimp and turbot, having some processing capabilities on board, and able to remain at sea for months at a time. Such vessels can cost upwards of \$25 million. Nevertheless, for Nunavut to truly participate in the offshore industry, it is a must.

Nunavummiut have recently taken actions to increase their participation levels:

The Baffin Fisheries Coalition recently chartered the *MV Inuksuk* to fish the northern Davis Strait turbot fishery, with a 51% Inuit crew on-board. The charter is for two years, with an option to purchase in that time.

This group has also submitted a detailed training program to Human Resources and Skills Development Canada under the Aboriginal Skills and Partnership Program to train Inuit from plant-level to technical and managerial positions.



HOUSING INITIATIVE

Alternatively, some could argue that a major housing initiative would provide the greatest return to Nunavummiut. Housing has been identified as a top priority for the Government of Nunavut and Nunavut Tunngavik Inc. with current conditions being described as severe. The government currently maintains close to 4,000 homes at great cost (approx. 12 per cent of the budget). The average number of occupants is 50 per cent higher in Nunavut than the Canadian average, where it is estimated that 54 per cent of Inuit live in crowded conditions compared to 7 per cent across the country. What's more, of the existing stock, approximately 25 per cent are over 30 years old and in serious need of modernization and repairs. Overcrowded and poorly designed homes have been linked with many negative social and health outcomes.

The shortage of housing is also impacting economic development. In some communities, there are not enough homes for teaching staff or health practitioners. In the larger centres housing complexes that can accommodate Inuit going to college, but who also have families, are lacking. This prevents these young parents from pursuing higher levels of education.

If taken over ten years, the major construction initiative of required housing could engage local businesses, providing jobs, training, and experience to community or regional-based small business. These short term impacts would give way to the longer-term benefits such as improved health, productivity, and social well-being as well as lowering operating costs that a reduction in overcrowding and improvements in the structural design of homes would have on the population.

6. ARE THERE ANY NEW COORDINATING ARRANGEMENTS THAT NEED TO BE MADE WITH FIRST NATIONS, MUNICIPALITIES, OR NGOS THAT MIGHT ENHANCE ECONOMIC DEVELOPMENT?

Inuit organizations, the Territorial and municipal governments, and the private sector recognized that all participants in the Nunavut economy had to work together to support economic development. They concluded that a coordinating body would be needed to advocate cooperation and to eliminate redundancy in economic development initiatives.

Nunavut's leaders also understand that dollars are scarce and that they must strive to maximize the benefits from every investment dollar spent across the entire territory. They recognize that to attract increased support from southern taxpayers, and to garner interest from the private sector, they must show that they are working at being effective with the resources they have. The Nunavut Economic Forum (NEF) has been tasked to achieve this goal.



In 2003, the NEF formed the Sivummut Economic Development Strategy Group¹² to develop the pan-organizational *Nunavut Economic Development Strategy* that was finalized in the summer of that year. Implementation of the Strategy now depends on the NEF members working internally to ensure that the commitments established in the Strategy are carried out. From the Forum's perspective, its objectives include:

- To share information between members;
- To support research and data collection related to Nunavut's economy;
- To develop and pursue an effective strategy for the economic development of Nunavut;
- To coordinate the activities of organizations in Nunavut with economic development mandates;
- To coordinate economic development planning in Nunavut;
- To increase the participation of Inuit in the development of the Nunavut economy; and
- To increase the participation of Nunavut communities in the Nunavut economy.

The Forum acts as a facilitator for these processes and brings the many levels of government, industry and communities together, though clearly the authority rests with every organization and the actions they take.

In terms of federal programming in Nunavut, there are a number of concerns worth noting where changes could enhance economic development for the territory. Many federal funding programs supporting economic development are now based on the needs of developed provinces that have well-established infrastructure and programs.¹³ This funding approach was not always the case. The current federal funding programs are often based on a per capita formula that works to the disadvantage of jurisdictions with a low human/land ratio. The levels of funding are usually more suitable for repairing existing infrastructure, as is often the case in southern Canada, than for building new infrastructure systems. In the case of tourism, most funding is available for promoting and marketing products whereas Nunavut requires funding to develop its products. Nunavut is therefore at a different stage of development, similar to where the provinces were in the 1950s. Federal investment programs must be adapted to these differences in stages of development.

¹² Sivummut is an Inuktitut word meaning "towards the future."

¹³ The Conference Board of Canada, *Capital Funding Considerations for Nunavut*, prepared for Nunavut Tunngavik Incorporated and the Economic Development Agency Working Group (December, 2002).



KNOWLEDGE AND INFORMATION INFRASTRUCTURE

Greater scientific knowledge and traditional information were identified in the first section of this report as critical areas for Nunavut's socio-economic development. Existing information cannot answer important questions on Nunavut's economic prospects such as: What is the extent of mineral opportunities across Nunavut? Are there enough fish in the sea and caribou on the land to sustain significant commercial activity? What is the social and economic impact of failing municipal infrastructure? And, what are the impacts of climate change on Nunavut?

7. IN YOUR OPINION, IS THE CURRENT KNOWLEDGE AND INFORMATION BASE ADEQUATE FOR BOTH PUBLIC AND PRIVATE SECTOR DECISION MAKERS WITH RESPECT TO:

- NATURAL RESOURCES (RESOURCE INVENTORIES - GEOLOGY - MAPS ETC.)

MINERAL RESERVES AND TOPOGRAPHIC MAPPING

In 1999 when Nunavut entered confederation as a distinct territory, approximately half of the Territory (53 per cent) had geological bedrock mapping available at a 1:250,000 scale.¹⁴ This level of detail is considered the most basic mapping requirement for the exploration industry to make investment decisions. For 1:50,000 mapping, the coverage is very sparse—between 40% and 50% for paper maps and 0% for digital data. This makes Nunavut the only jurisdiction in Canada without complete mapping coverage at this level of detail.

The Federal-Nunavut Geoscience Centre was formed and is working to improve Nunavut's mapping. Meetings are being held to develop a strategy to complete the Territory's mapping needs.

Improved mapping would increase the likelihood of mineral discoveries and would lower costs to exploration companies by narrowing their search areas. But perhaps more importantly, the increased knowledge would allow for better planning by government, communities, business and individuals. For government, information will provide for better assessment of infrastructure and training needs. For communities and small business, the information can provide input into local economic development strategies and in local capital investment plans. Finally, for individuals, the information can be used in deciding what education or training programs would serve them best.

¹⁴ Gartner Lee Limited, *Nunavut Geoscience Database* (October, 1998).



FISH STOCKS

A baseline understanding of aquascience is needed to ensure a healthy fishery in Nunavut. Climate change is expected to lead to dramatic changes in arctic water flows, leading to major management challenges—particularly if fundamental ecological research has not been undertaken. This involves species interactions, habitat characteristics, interaction between fishing practices and habitat/species balance and so on.

Recent fisheries science research by the Department of Fisheries led to an increased quota for the exploratory turbot fishery in the Davis Strait off the east coast of Baffin Island. However, far more research is needed in areas of stock regeneration timelines (species response to commercial activity) and movement patterns (fish tagging and tracking).

Currently, the Department of Fisheries and Oceans operates under a policy that has industry pay for research from which it may benefit in the future. This has meant that most of the revenues generated through Nunavut's exploratory fishery are being poured back into research. However, the length and breadth of information needed may mean no money will remain for other needed investment initiatives, such as marine infrastructure, fishing vessels and training programs.

Data on char stocks is also needed. The number of char found in and around communities has been seriously depleted, but little is known about the extent to which it can sustain a commercial fishery. Char offers opportunities through tourism and sports fishing, and information is needed in this area to determine the most beneficial approach to developing the resource.

CARIBOU

The changing numbers of caribou across Nunavut continues to receive attention. A recent aerial study by the governments of Nunavut and the Northwest Territories, along with the federal government, concluded that the Bathurst caribou herds are declining.¹⁵ More science is needed to understand whether the decline is a result of environmental conditions, industrial development or is simply part of the herd's natural cycle. The Nunavut Wildlife Management Board recently completed its five-year wildlife survey that studied wildlife numbers including caribou. Their report has yet to be published.

The critical issue is whether the commercial practices are unsustainable. The NLCA states that subsistence activities shall not be harmed by the commercialization of Nunavut's wildlife. This policy can only be enforced if the impacts on wildlife from commercial activity are known.

¹⁵ http://www.arctic-caribou.com/news_december03.html#bathurst



- BASELINE ENVIRONMENTAL DATA¹⁶

There is insufficient public data in which to provide a comprehensive report on Nunavut's environmental performance. Like other areas, Nunavut must not only be concerned about its own environmental performance but the performance of other jurisdictions as well. Many of the threats to Nunavut's environment—global warming and contaminants—originate from other areas but hit the Nunavut ecosystem hard.¹⁷

According to the latest report from the Northern Contaminants Program, mercury levels appear to be increasing in lake sediments in Nunavut south of 80th latitude and levels of mercury and other heavy metals are expected to increase in the Canadian Arctic Ocean through climate change.¹⁸ Levels of persistent organic pollutants (POPs) on the other hand appear to be declining in some locations across the Canadian Arctic.

The northern environment is particularly vulnerable to certain contaminants as it takes much longer for them to dissipate than in southern regions. Further, the contaminants can get into the food chain at more concentrated levels and ultimately be consumed by Nunavummiut who rely on country food as a primary staple in their diet. In both the Baffin and Kivalliq regions, more than one quarter of the population is taking in levels of mercury through country food that are above the level known to be safe.¹⁹ Studies have found high levels of PCB concentrations in Inuit women including those living in Nunavut.²⁰ Similar situations exist in other Arctic jurisdictions such as Greenland.

Poor environmental practices can harm Nunavut's economic performance with respect to its land-based or subsistence economy and its commercial food and tourism industries. This has certainly been the case elsewhere. For example, nearly 36 per cent of waters on the Atlantic coast suitable for direct harvesting of shellfish were closed in 1995 due to pollution from municipal sewage treatment plants, agricultural runoff, and private residences.²¹ And there was an example in Iqaluit where an adventure-tourism operator decided to have

¹⁶ This section is based in part on the report, *Infrastructure Planning for Nunavut's Communities*, produced for the Nunavut Association of Municipalities by The Conference Board of Canada (December, 2003).

¹⁷ David Leonard Downie and Terry Fenge (eds.), *Northern Lights Against POPs: Combating Toxic Threats in the Arctic* (Montreal: McGill-Queen's University Press, 2003). For the effects of climate change on Alaskan villages, see U.S. Senate Committee on Appropriations, *Committee Field Hearings on Alaska Native Villages Affected by Flooding and Erosion*, June 29 – June 30, 2004. <http://appropriations.senate.gov/index.cfm>

¹⁸ Northern Contaminants Program, *Canadian Arctic Contaminants Assessment Report II. Highlights* (Ottawa: Indian and Northern Affairs Canada, 2003).

¹⁹ *Ibid.* p. ix.

²⁰ David Leonard Downie and Terry Fenge Eds., *Northern Lights Against POPs: Combating Toxic Threats in the Arctic* (Montreal: McGill-Queen's University Press, 2003), p. 12.

²¹ Environment Canada, *The State of Municipal Wastewater Effluents in Canada* (Ottawa: Minister of Public Works and Government Services Canada, 2001), p. 36.



customers bypass Iqaluit due to garbage in the streets and burning at the nearby dump.²²

There will be increased threats to Nunavut's environmental performance in the future such as population growth and a subsequent rise in demand for water consumption, water treatment and solid waste management. In addition, any new industrial activity will require infrastructure be in place to minimize the impact on the surrounding environment.

- SOCIAL AND ECONOMIC INDICATORS

Nunavut's small population and large geographical range have resulted in generally poor statistical coverage. The local Bureau of Statistics undertakes as many household surveys as possible, but the information gaps on both social and economic indicators remains in severe deficit.

Statistics Canada does not conduct its Labour Force Survey in Nunavut, which cripples attempts to truly understand employment levels and other labour force trends. Also, because Nunavut's economy is small with few economic agents, data is often concealed from the public to protect the privacy rights of those involved. Recent Provincial Economic Accounts (PEA) releases have blocked as much as one-third of the time series for that reason.

Again, as a result of the economy's size, updates and revisions to data can show major shifts or swings, making interpretation difficult and casting great doubt as to the reliability of the data. At times, the swings in data are the result of minor changes in an industry with few players, but can also result from poor statistical sampling. For instance, in 2002, Statistics Canada's PEA showed income per capita in Nunavut equal to \$22,175 for the previous year. One year later, the results were revised for that year showing income per capita valued just under \$29,500. Which result is correct, and do we need to wait another year to see if a trend in sampling will emerge? This kind of swing in published economic indicators clouds our understanding of the actual economic outcomes in Nunavut, and makes policy development difficult in this respect.

Information on social well-being is often outdated, in particular in areas such as education and health. A lot of the data dates back to 1999 or earlier, before the separation of Nunavut from the NWT. Sound analysis starts with good information, and information on Nunavut has been lacking.

As will be discussed in response to the next question, a knowledge gap of the social impacts from economic development will emerge as the Nunavut economy begins to grow. At present, while the statistical coverage on social well being is not great, the outcomes of poor housing, a lack of employment opportunities, low health status and education levels, and general issues of poverty are known, and programs and policies can be designed and delivered

²² Miriam Hill, *Trash prompts tourism boycott*, Nunatsiaq News, August 17, 2001.



based on this knowledge. But, with the coming of economic opportunities and financial success, new issues will emerge and must be understood before they can be dealt with effectively.

8. WHAT ARE THE MOST SERIOUS INFORMATION OR KNOWLEDGE GAPS? WHERE DO WE NEED TO INVEST IMMEDIATELY? WHAT COULD BE LEFT FOR THE MEDIUM TERM?

Similar to the issue of prioritizing infrastructure investments, determining which information gap is most serious, and requires the most immediate action, depends on how you prioritize the need for economic, social and environmental performance in Nunavut.

There is a strong argument for a more immediate and concerted effort to increase the knowledge of the level and extent of natural resources present in Nunavut. If, for instance, fish stocks cannot sustain an expansion of the commercial fishery then finding this out, sooner rather than later, will save investment expenditures in numerous areas including infrastructure, training and organization. Alternatively, the opposite finding would lend greater support to actively pursue expansion and make the necessary investments. Similar arguments can be made for caribou herds.

In the case of geoscience, it is generally agreed that Nunavut does have extensive mineral reserves. Improved mapping will hasten their discovery and advance mining opportunities. Again, this information is needed in support of significant investments in broad capital areas.

By moving this information gap to the top of the priority list, it could also lend support to another concern for Nunavut, which is training people for the right jobs. Nunavut is beginning to see some success in basic education, but continues to struggle with forecasting what job training should be offered. One of the problems is that there is not enough information available to make an educated decision in this area. Increasing the investments in information gathering would help alleviate this challenge. This is partially due to a lack of information on the economic opportunities that exist.

As the Territory begins to access its economic opportunities, it will become increasingly important to gain a greater understanding of the social impacts economic success has on communities. This is particularly true of communities with little prior experience in the wage economy.

Nunavut should take the experience of the NWT to heart in this area. The diamond industry has brought great economic prosperity to the region, but is also creating significant negative social outcomes, including increased crime, substance abuse, and family violence. The NWT is now seeing impacts on migration from smaller communities into larger centres and, in some cases, out of the NWT altogether. The impacts of this movement have not yet been quantified, but it has definitely increased the pressure on municipal infrastructure and social programming.



Knowledge and public recognition of such outcomes is crucial in preparing for economic development. Acknowledgement should lead to effective planning to manage change.

CAPACITY BUILDING OF HUMAN RESOURCES

9. FROM YOUR PERSPECTIVE, ARE THERE CRUCIAL CAPACITY GAPS THAT INHIBIT NORTHERNERS FROM TAKING ADVANTAGE OF CURRENT ECONOMIC OPPORTUNITIES?

(FOCUS HERE SHOULD BE ON LABOUR FORCE AND LEADERSHIP DEVELOPMENT RATHER THAN THE BROADER MORE COMPLICATED ISSUE OF IMPROVING EDUCATIONAL ATTAINMENT AT THE ELEMENTARY AND SECONDARY SCHOOL LEVELS.)

There are most certainly issues of labour force capacity impacting Nunavut. Research has shown that educated labour generally finds employment in Nunavut. The 2001 Household Survey found that over 90 per cent of Nunavummiut with a high school education or more worked that year, whereas a mere 52 per cent of the labour force with less than grade twelve did the same. This information should be coupled with Statistics Canada's education statistics showing that 38 per cent of working-aged Nunavummiut did not have their grade twelve as of 2001. We can draw some broad-based conclusions from this information. First, it confirms a well-recognized outcome from the promotion of education, namely that "education matters". Second, we know that Nunavut is ripe with economic potential, and eventually, at least some of the opportunities already discussed will be developed. Nunavut's labour force will need skills and training if they are to take part in the activities.

TRADES TRAINING²³

Nunavut is entering a period of infrastructure upgrades and development and industrial economic growth while suffering from a shortage of local skilled trades people. Making matters worse, a lack of labour market information is limiting Nunavut's understanding of the specific labour needs and its ability to project current needs into the future. Efforts to enable Inuit to gain the skills and experience they need to become qualified trades people are recognized as a key element of any human resources development component of an economic strategy.

Three elements need to be addressed in order to increase the number of trades people in Nunavut. These include:

- Availability of individuals with the required basic education and willingness to pursue specific trades;

²³ Adapted from *Trades Training*, Doug Brubacher (February 2003). Submitted for discussion to the Sivummut Economic Development Strategy Group.



- Design of appropriate trades programs;
- Ability to deliver both the classroom and the practical components of the program.

10. WHAT WOULD YOUR SUGGESTIONS BE FOR FILLING THESE GAPS?

(I.E. IS IT A QUESTION OF EXISTING PROGRAMMING NOT HAVING ENOUGH RESOURCES TO MEET DEMAND; OR AN ABSENCE OF APPROPRIATE PROGRAMMING?)

ADDRESSING TRADES TRAINING NEEDS²⁴

To achieve trades certification, individuals need to experience success in many areas before they even begin the technical part of their training. The education system has a role to play in equipping individuals with the literacy, numeracy, and basic education levels needed to enter trades programs. Families and communities have critical roles in the individual's formation of life-skills and in providing stable and safe surroundings that promote early childhood development and ultimately, productive citizens.

Trades programs need to be designed to meet the needs of Nunavut employers and of the individuals who enter the trades. This process involves:

- individuals interested in the trades;
- the private sector;
- the Community Economic Development Organisations (CEDOs);
- the delivery agents (Nunavut Arctic College; Department of Education);
- funders (Inuit organisations, GN, Federal Government); and,
- the Nunavut Apprenticeship Board.

Some of the design issues that need to be considered include:

- Nunavut-based certification;
- identification of priority trades areas based on labour information; and
- entry requirements and value of experience.

Nunavut trades training programs must be appropriate to the region. For instance, classroom instruction must be available in Inuktitut, as should the entrance exams. Entrance exams seek applicants' knowledge in math, English, and science, which is a barrier to success for unilingual Inuktitut speakers.

Access to basic communications technology—and the people able to manage and maintain it—is limited in many communities, raising problems for training delivery. Lack of consistency in program availability from year-to-year makes it

²⁴ Adapted from *Trades Training*, Doug Brubacher (February 2003). Submitted for discussion to the Sivummut Economic Development Strategy Group.



difficult for individuals to plan ahead to enter a program. For example, the short-term nature of Nunavut Arctic College funding makes long-term delivery planning difficult. Inadequate labour market information further limits the ability to strategically allocate training resources to the most important areas.

Trades training initiatives in Nunavut require a broad-based, quality education recognizing the unique needs of Nunavummiut. Trades training should be general and not focused on one sector, such as mining. A trade school with trades training shops in each region and with travelling instructors could provide training for entry into a wider variety of industries such as transportation, communications, construction and mining.

SMALL BUSINESS SUPPORT

11. WHAT CHALLENGES DOES SMALL BUSINESS IN THE NORTH CURRENTLY FACE?

Nunavut's small business sector faces many obstacles:

- Labour costs are high and governments and Inuit organizations regularly outbid business for talent.
- Many larger private-sector opportunities require skills and capital that small and Inuit businesses do not currently possess.
- Many public sector tenders are too large for local businesses to bid on.
- Nunavut trades people have difficulty qualifying as journeyed trades people because of language and literacy barriers in current testing methods (as outlined in the our answer to the previous question).
- Nunavut has a small population, and therefore a very small base of customers for business.
- The inadequacies of infrastructure - communication networks and transportation links, for example - limit the growth of small businesses.
- To reach larger markets, Nunavut business must cope with the realities of geography, which result in very high costs of trade.
- Small businesses too often find it difficult to obtain venture capital in Nunavut because of the lack of personal savings and the absence of community lending institutions. This can prevent entrepreneurs from developing their businesses and limits local participation in larger public sector contracts.

12. IS ACCESS TO CAPITAL, INCLUDING VENTURE CAPITAL, AN ISSUE?

As the private sector grows and investment opportunities emerge, adequate investment capital must be made available. Household savings are a key source for the capital needed to support private-sector growth. Yet facilities to support the accumulation and investment of savings in our communities are, with a few exceptions, absent. Currently Nunavut Tunngavik Incorporated,



Atuqtuarvik Corporation and Arctic Cooperatives Ltd. are examining options for a community-based financial institution for Nunavut, such as a trust company or credit union, which would serve as mechanisms for community savings and investment.²⁵

Some difficulties have been identified with the lease-based municipal land tenure system as affecting loans normally secured by using the land as collateral. Many of these involve the establishment of a land registry system, unsurveyed land and the requirements for capacity building at the local level.

13. ARE CURRENT PROGRAMS AND SERVICES OFFERED BY THE PUBLIC SECTOR - TERRITORIAL AND FEDERAL - OR THE PRIVATE SECTOR APPROPRIATE FOR ADDRESSING THE BUSINESS COMMUNITY'S NEEDS?

The primary mechanism employed by the Government of Nunavut to support small business is the Nunavummi Nangminiaqtunik Ikajuuti (NNI) Policy. This is the government's contracting preference policy, and was designed in collaboration with NTI. The NNI Policy has the following objectives:²⁶

- Good Value and Fair Competition
- Strengthening the Nunavut Economy
- Inuit [representative] Participation
- Nunavut Education and Training.

All objectives are considered of equal importance.

There are other ongoing activities that should be continued or promoted to support small business in Nunavut. These are not so much programs as initiatives that have been implemented and should continue, or require implementation. They include:

- Working with Inuit businesses to help them win government contracts, particularly through full implementation of Article 24 of the *MLCA* by the Government of Canada, including the development of procurement policies for federal contracts in Nunavut.
- Monitoring and reporting on the outcome and socio-economic benefits of government contracting.
- When planning the timing of capital projects, taking into account the readiness of local businesses to supply goods and services (whenever possible, projects should be initiated only after communities have had time to prepare for the benefits that may arise from these projects).

²⁵ *Alternatives for Providing Credit Union Service for Nunavut*, paper prepared for Arctic Cooperatives Ltd., (May, 2004).

²⁶ *Nunavummi Nangminiaqtunik Ikajuuti Policy* Revised, March 31, 2004, Section 7.



14. WHAT OTHER PROGRAMS, SERVICES OR INVESTMENTS WOULD YOU RECOMMEND BE MADE OVER THE SHORT TERM TO ADDRESS THE NEEDS OF SMALL BUSINESS?

Approaches must be found to foster closer collaboration among lending organizations, and to encourage the extension of a one-window application system, where applicable.

In the near future, household savings must increasingly become the source of capital needed to support private-sector growth. At present, facilities that could support the accumulation and investment of savings in Nunavut's communities are, with few exceptions, absent.

The *Nunavut Economic Development Strategy* has a number of recommendations on new mechanisms to support small business development over the short and medium term:

- Develop and implement measures to improve how public sector and non-government institutions currently administer business loans and risk capital.
- Expand the Business Development Centre Program to all Nunavut communities.
- Strengthen the role and capacity of the chambers of commerce in Nunavut to better accommodate the circumstances and explicitly meet the needs of small business.
- Review the impacts of government policies, programs, and incentives on the development of local business capacity, with a view to implementing improvements.
- Assess and, where required, reform government purchasing to strengthen its contribution to community economic development.
- Design and implement a "business aftercare" program to help firms maintain and expand their operations.
- Create a community savings and loans network, through institutions such as cooperatives or credit unions, and by using community bonds or other measures, as a means of increasing the availability of local capital for business development.



ECONOMIC DIVERSIFICATION

15. ARE DIFFERENT APPROACHES REQUIRED TO BUILD MORE DIVERSIFIED ECONOMIES?

The Nunavut economy is not diversified. It depends on public sector spending to fuel 60 per cent of the territory's real domestic demand.²⁷ In fact, since Nunavut's entrance into the Canadian confederation in 1969, the Territory's dependence on government spending has actually increased every year, from 55 per cent in 1999 to its current level. Therefore, any progress made in advancing private sector activity would build diversification into the economy.

Part of the reason for Nunavut's slide toward greater reliance on government activity has been the end of active mining in 2003, when the last operating mine halted operations. This reduced gross domestic product in the territory by over 10 per cent. The Lupin Gold Mine has since reopened, although temporarily, and prospects for new mines are very good. Over time, there should also be an increase in fishing and tourism activity to further broaden the economy.

With this said, there is certainly more Nunavut can do to enhance the diversity of its economy. For example, Nunavut could consider some approaches that have been successful elsewhere. The first is partnership. Nunavummiut are passionate about being in control of their affairs and being responsible for the outcomes of their own actions. However, there are costs to this approach if it slows economic progress to the point where people suffer from a lack of economic opportunities. Nunavut's emerging young workforce need the prospect of jobs to keep them motivated to attend school and to remain in the Territory after finishing their studies. With social concerns growing, Nunavut needs some economic success soon. Partnerships with outside firms can bring capital and expertise to the region and help the economy gather some initial private-sector success.

This is not to say Nunavut is uninterested in attracting private-sector investors, but it could do more to provide assurances and prove the region is stable. To date, the regulatory regimes in place have gone largely untested. However, with the potential opening of a number of mines, these systems will be tested soon and will provide a chance to show investors that Nunavut is "open for business".

16. ARE THERE KEY SECTORS THAT YOU WOULD CONCENTRATE ON? E.G. TOURISM OR DEVELOPMENT OF NICHE MARKET PRODUCTS (E.G. ARTS - FISH - GAME - FILM - MUSIC ETC.).

The areas where Nunavut's economy could diversify have, to a great extent, been given. Certainly, there are more niche areas that would further enhance

²⁷ 2003 Provincial Economic Accounts, Statistics Canada.



Nunavut's economy and reduce its reliance on government spending. For instance, the arts sector and cultural industries were mentioned as an area of potential growth, having some degree of association with the tourism industry. But within this sector, there is a great variety of opportunities that may serve to boost Nunavut's economy in a far greater manner than currently understood. This sector in particular would be well served by a proper evaluation and study into its current contribution to the economy and its future potential.

Though not a sector, the export market is an area identified within the Nunavut Economic Development Strategy as one that should be targeted in a more concerted and organized manner that would provide the territory's goods and service providers with a diversified market in which to offer their products.

Currently, Nunavut's access to external capital is limited.²⁸ Apart from federal government transfers and the sale of non-renewable resources, capital enters the Territory in a scattered and inconsistent manner through disjointed sales of country food, marine mammals, wild furs, tourist activities and some arts and cultural products. Accessing external capital is important because most goods and services Nunavummiut purchase come from other regions, either from southern Canada or outside Canada. In 2003, Nunavut's residents imported \$859 million (real \$1997) worth of goods and services while selling only \$140 million to other regions of Canada or abroad.²⁹

Promoting greater exports would also stimulate the economy and create jobs. Nunavut's economic growth is driven almost entirely by government activity (this is especially the case now that the Polaris and Nanisivik mines have closed). But this need not be the case, since there are many valuable skills and resources in Nunavut that are not being exploited. Finding stable markets for processed country food, arts and cultural products, and tourism products can help diversify the economy and provide Inuit with career choices and the opportunity to unite traditional activities with income generation. Perhaps most important, an expanded and diversified economy will provide an alternative to social assistance, especially for the 50 per cent of the population that is currently under the age of 20 and who will soon enter the labour market. These individuals need productive choices and most Nunavummiut do not want emigration to other parts of Canada to be the primary one.

With few sources of capital and most spending on consumer goods flowing directly south, there is little opportunity for people to establish savings. This reduces local investments in wealth-generating capital. As a result these investments must come from the south, which leaves important investment decisions (like where capital improvements are most needed) up to the discretion of non-Nunavummiut. It also leaves ownership of this capital in the hands of outsiders, while Nunavummiut lose control over their own economy.

²⁸ Adapted from the *Nunavut Economic Development Strategy* and the Concept Paper *Export Development in Nunavut*, The Conference Board of Canada (December, 2002).

²⁹ *2003 Provincial Economic Accounts*, Statistics Canada.



REGULATORY ISSUES

17. ARE THERE SPECIFIC STEPS THAT NEED TO BE TAKEN ON REGULATORY MATTERS IN ORDER TO PROMOTE SUSTAINABLE DEVELOPMENT IN THE TERRITORY? ARE THERE ANY UNREASONABLE OBSTACLES TO ECONOMIC DEVELOPMENT IN REGULATIONS OR PAPER WORK?

To a great extent, the regulatory regime in place has gone untested thus far due to a lack of new developments. The concern would be that these new regulatory bodies lack experience and confidence to make good decisions in a timely fashion. The Nunavut Impact Review Board (NIRB) is a good example of this. With the Federal government calling for a Level V Environmental Review of the Bathurst Inlet Port and Road Project, the NIRB will be responsible for this work, which will certainly test its abilities.

With this said, the process that was undertaken by the federal government to come to this decision highlights the need for Nunavut to gain greater control over the decision-making responsibilities in the Territory. The application for the environmental review of the Project was submitted over two years prior to the federal government taking its final decision for a Level V review to go ahead. This time delay was unnecessarily long, and represents a significant cost to the developing economy of Nunavut. It is regulatory processes like this that Nunavut and the federal government must work to expedite.

The greatest advantage Nunavut has in terms of its regulatory regime is the *NLCA*. Unlike their neighbours in the NWT, where each region is negotiating distinct land claim agreements—all with their own rules and regulations—Nunavut has one land claim, and one process to follow anywhere in the Territory. The *NLCA* provides a solid legal and regulatory framework for Nunavut's governance and economic development. It establishes certainty for investors. However, with that said, it too is largely untested.

The territorial status adds a level of complexity to natural resource development. Developers working in the NWT under the same federal system are generally not bothered by the federal government process so long as it does not change from one year, month or week to the next and provided that all rules and regulations are spelled-out and easy to understand. It is critical that the federal government work openly with the Government of Nunavut when dealing with lands and water. While it could be argued that these are currently federal jurisdictions, the territorial government and its leaders have political responsibilities regarding activities in the Territory and must be informed. In this regard, the Nunavut Government should not be required to spend valuable dollars in overlapping federal responsibility areas to duplicate information.



CONCLUDING AND OTHER POINTS

18. ARE THERE ANY OTHER POINTS YOU WISH TO MAKE, IN TERMS OF THINGS NOT COVERED OR FINAL OBSERVATIONS?

Nunavut's social and economic conditions are ripe with potential.³⁰ Opportunities exist in mining, fishing, tourism and cultural industries, and the public sector. Nunavut's population is the youngest in Canada, and these youth will soon enter the labour force eager to find employment and improve their quality of life. However, without the necessary investments, these opportunities will be lost. At risk is not only the development of a mine or a few jobs in the fishery, but also the future prosperity of Nunavut itself. With a median age of 22, Nunavut's labour force could be more than 50 per cent larger in only 20 years.³¹ If this economic potential has not been realized or the social conditions throughout the territory have not improved by the time many of these youth reach adulthood, one could foresee a loss for Nunavut such as the emigration of young employable Nunavummiut to other areas of Canada and continued reliance on federal transfers for almost all of the Territory's revenue.

The challenges faced by Nunavut have been summarized as follows:³²

Employment opportunities today in Nunavut do not extend much past the public service. However, not all Inuit are interested in building a career in this field. Nor is it likely that government will continue to expand at the same rate it has over the past few years—certainly not at a pace to meet the employment needs of the Territory's young adults entering the labour force.

Fortunately, opportunities exist in a number of export-driven fields that could bring great prosperity to Nunavut if Nunavummiut are able to participate.

Given the existing education, health and social concerns in many communities, there is a general fear that Nunavummiut (including the youth population) will *not* be equipped to take these opportunities. In other cases, a severe lack of infrastructure will impede access to resources and development.

Investments are therefore necessary to ensure Nunavummiut can participate in their own economy, that this economy is able to grow, and that this growth is sustainable.

Failure to do so represents a major concern, given the rise in working-age population, which is magnified by the situation of crowded housing, and the already high levels of alcohol abuse, suicide, and family violence.

³⁰ This paragraph taken from *Infrastructure Planning for Nunavut's Communities*, Nunavut Association of Municipalities (December, 2003).

³¹ Statistics Canada's medium growth rate population projection.

³² The Conference Board of Canada, *Capital Funding Considerations for Nunavut*, prepared for Nunavut Tunngavik Incorporated and the Economic Development Agency Working Group (December, 2002).



Meanwhile, all future growth must strike a delicate balance between industrial development and environmental preservation. Nunavummiut acknowledge the need to grow and develop, but not at the cost of the land and environment, that has sustained them for centuries.

The key, then, is to find solutions to these challenges. Some of the concerns over the level of capital can be addressed through greater personal effort, improved trust and co-operation, and a collaborative approach. These actions can be effective and produce considerable results. However, at the end of the day what remains is a financial deficit preventing the riddance of these impediments to sustainable economic and social growth. These impediments must be addressed if Nunavut is to become and prosperous, productive and sustainable region of Canada.



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APPENDIX A



Some Questions to use in Consultations

**PRELIMINARY CONSULTATIONS WITH NORTHERNERS BY THE
PARLIAMENTARY SECRETARY, THE HONOURABLE LARRY BAGNELL
CONCERNING NORTHERN ECONOMIC DEVELOPMENT**

**FOR USE DURING
Spring/Summer 2004**



INTRODUCTION

This guide has been prepared to assist the federal government conduct a series of initial discussions with key partners on promoting northern economic development in Canada's three northern territories in a manner consistent with the principles of sustainable development. A draft list of questions attached have been developed along thematic lines to assist in capturing a broad understanding of the views of northerners and other stakeholders on issues, challenges and priorities with respect to northern economic development. Results of these discussions will help shape more detailed work to develop a Northern Development Strategy with northerners.

(If you are providing written responses, if at all possible number your answers to coincide with the questions. so we can more easily compile them with other groups' answers to the same question)

General Overview

1. From your perspective, what do you think are the greatest economic challenges confronting the North/this territory as a whole today?
2. From your perspective, what do you see as the North's/territories' greatest "assets, opportunities, or strengths with respect to economic development?
3. What do you see as the great gaps in terms of current investments in northern economic development? In which areas would investments provide the maximum impact for Northerners?

For example:

- Physical infrastructure (roads. telecommunications etc.), development of knowledge and information (e.g. resource inventories and environmental knowledge)
- Capacity building (education, training, community leadership)
- Small business support (e.g. access to capital - venture capital) Product development and marketing
- Cultural industries (e.g. film, video. music)

Physical Infrastructure

4. Given that federal and territorial investments are and will continue to be made to improve physical infrastructure at the municipal level (Infrastructure Canada Program and Municipal Rural Infrastructure Fund) and more broadly at the strategic level through the Canada Strategic Infrastructure Fund, are there other infrastructure priorities that in your opinion still need to be addressed? (e.g. telecommunications?)



5. Are there particular projects that would provide major dividends? (e.g. a road to a resource rich region, a hydro-electric project, etc.)?
6. Are there any new coordinating arrangements that need to be made with First Nations, Municipalities, or NGOs that might enhance economic development?

Knowledge and Information Infrastructure

7. In your opinion, is the current knowledge and information base adequate for both public and private sector decision makers with respect to:
 - natural resources (resource inventories - geology - maps etc.)
 - baseline environmental data
 - social and economic indicators
 - other areas?
8. What are the most serious information or knowledge gaps? Where do we need to invest immediately? What could be left for the medium term?

Capacity Building of Human Resources *Focus here should be on labour force and leadership development rather than the broader more complicated issue of improving educational attainment at the elementary and secondary school levels*

9. From your perspective are there crucial capacity gaps that inhibit northerners from taking advantage of current economic opportunities?
10. What would your suggestions be for filling these gaps?
i.e. Is it a question of
 - Existing programming not having enough resources to meet demand; or
 - An absence of appropriate programming?

Small Business Support

11. What challenges does small business in the North currently face?
12. Is access to capital, including venture capital, an issue?
13. Are current programs and services offered by the public sector - territorial and federal - or the private sector appropriate for addressing the business community's needs?
14. What other programs, services or investments would you recommend be made over the short term to address the needs of small business?



Economic Diversification

15. Are different approaches required to build more diversified economies?
16. Are there key sectors that you would concentrate on? e.g. tourism or development of niche market products (e.g. arts - fish - game - film - music etc.)?

Regulatory Issues

17. Are there specific steps that need to be taken on regulatory matters in order to promote sustainable development in the territory? Are there any unreasonable obstacles to economic development in regulations or paper work?

Concluding And Other Points

18. Are there any other points you wish to make, in terms of things not covered or final observations?

If you would like to submit responses to the questions or comment further, please forward your response to:

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APPENDIX B



LIST OF NEF MEMBERS (Updated October 2006)

INUIT ASSOCIATIONS
Nunavut Tunngavik Incorporated
Kitikmeot Inuit Association
Kivalliq Inuit Association
Oikiqtani Inuit Association
Atuqtuarvik Corporation
BUSINESS DEVELOPMENT ORGANIZATIONS
Sakku Investment Corporation
Oikiqtaaluk Corporation
Kitikmeot Economic Development Commission
Kivalliq Partners in Development
Kakivak Association
Baffin Business Development Centre
CHAMBERS OF COMMERCE
Baffin Regional Chamber of Commerce
Iqaluit Chamber of Commerce
MUNICIPALITIES
Nunavut Association of Municipalities
Nunavut Economic Developers Association
NON-GOVERNMENTAL ORGANIZATIONS
Qullit Nunavut Status of Women Council
LABOUR
Nunavut Employees Union
GOVERNMENT OF NUNAVUT
Department of Economic Development and Transportation
Nunavut Arctic College
Nunavut Business Credit Corporation
Nunavut Development Corporation
Qulliq Corporation
GOVERNMENT OF CANADA
Department of Indian and Northern Affairs
Nunavut Federal Council
SECTOR REPRESENTATIVES
Arctic Co-operatives Ltd.
Nunavut Arts and Crafts Association
Nunavut Tourism
Baffin Fisheries Coalition
Nunavut Broadband Development Corporation