



West at a Glance

SEPTEMBER 2017



WEST AT A GLANCE

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PROVINCIAL GOVERNMENT DEVELOPMENTS

BRITISH COLUMBIA

- **BC government supports improving labour skills and conditions** – Premier John Horgan announced the BC government will [eliminate tuition fees for adult basic education and English learning programs](#) in the province. The previous government introduced tuition fees with a \$1,600 cap in 2015, and since then enrolment in those programs has dropped almost 35 percent. The fee change is expected to help more people gain the skills and knowledge required to participate in BC's economy. The BC government will also be [increasing the minimum wage](#) by 50 cents to \$11.35 an hour, starting September 15, 2017. The increase will give BC the third highest minimum wage in Canada. Some small business owners voiced concerns with the announcement but are hopeful for tax breaks next year that may offset some of the increased costs.
- **BC government receives intervener status in TMX court case** – The BC government is following through on its opposition to Kinder Morgan's Trans Mountain Expansion Pipeline (TMX) by outlining the [legal and consultation steps](#) it will be taking. The province has hired Thomas Berger as external counsel to provide the government with legal advice related to TMX. There are 19 separate lawsuits seeking to overturn the project's environmental approval, including from BC First Nations, local governments, and environmental organizations. The BC government [applied for and received intervener status](#) for the case against TMX, with the stated intent of holding the project to the highest standards in terms of environmental protection and Indigenous consultation. Hearings have been scheduled for October 2017.

ALBERTA

- **Alberta releases its First Quarter Fiscal Update** – The Government of Alberta (GoA) released its [First Quarter Fiscal Update](#) on August 23. Real GDP is forecasted to grow at 3.1 percent in 2017, up from the 2017 budget forecast of 2.6 percent. Growth is largely being attributed to an increase in oil drilling, which doubled compared to the same period in 2016, and to housing starts which increased 23 percent from the same period in 2016. In addition, around 17,000 jobs have been added to the economy so far this year, raising the employment rate to 1.3 percent from the 0.9 percent forecast in the budget. The current deficit remains at \$10.5 billion.
- **Alberta invests additional money in Indigenous construction program** – The GoA announced that it will invest an additional \$1.9 million over two years to support the [Alberta Indigenous Construction Career Centres](#) (AICCC) at NorQuest College (Edmonton) and Bow Valley College (Calgary). The AICCC is expected to help approximately 1,700 individuals receive training in the construction industry and acquire greater connections with employers by providing career coaching, resume development, safety courses, job search support, as well as workshops and training.
- **Alberta modifies its liquor licence policies** – Effective August 15, the GoA and the Alberta Gaming and Liquor Commission (AGLC) have modified their policies to add a [new license category](#) which will effectively allow manufacturers to expand their local market sales, including allowing them to sell their products in local farmers markets.

SASKATCHEWAN

- **Saskatchewan Premier Brad Wall to retire from politics** – Premier Brad Wall announced that he will be [retiring from politics](#) once the Saskatchewan Party elects a new leader. First elected to the provincial Legislative Assembly in 1999, Mr. Wall has served as leader of the Saskatchewan Party for 14 years and as Premier of Saskatchewan since 2007. Former cabinet ministers who resigned their posts and have announced plans to run for the leadership of the Saskatchewan Party include Tina Beaudry-Mellor (Minister of Social Services), Ken Cheveldayoff (Minister of Parks, Culture and Sport), Gordon Wyant (Minister of Justice and Attorney General), and Scott Moe (Minister of Environment). Jeremy Harrison (Minister of the Economy) who had also resigned and announced his intention to run for leadership of the party, has since withdrawn his name and said he will back Scott Moe. Senior government official Alanna Koch, Deputy Minister to the Premier and Cabinet Secretary, has also announced her intentions to run for the leadership. The election of a new leader for the Saskatchewan Party will be held on January 27, 2018.
- **Government of Saskatchewan releases budget update for first quarter** – On August 25, 2017, Finance Minister Kevin Doherty released the province's [first quarter budget update](#). There was no change to the government's deficit forecast of \$684.7 million. Revenue at first quarter is expected to increase by \$42 million (0.3 percent) from the



budget forecast, while expenses are projected to increase by \$82 million (0.6 percent) compared to the budget forecast. Roughly \$40 million of the government's \$300 million contingency is being used to offset larger than forecast expenses, and a further \$125 million will be used to offset planned savings in compensation that will not be realized this year. In its 2017-18 budget, the Saskatchewan government proposed a reduction of \$250 million in public sector compensation, representing a savings of roughly 3.5 percent.

- **Saskatchewan Health Authority names its first CEO** – Saskatchewan's new single health authority has named [Scott Livingstone as its first CEO](#). The province is transitioning from twelve regional health authorities to a single authority beginning this fall. Previously, Mr. Livingstone served as the CEO of the Saskatchewan Cancer Agency.

MANITOBA

- **Manitoba Government launches new portal for community development programs** – The Manitoba government has centralized its [community development programs](#) and created a new single portal for intake, assessment, and awarding support. Programs that can be accessed include: Neighbourhoods Alive! Community Places, Community Planning Assistance, Hometown Manitoba, and Partner 4 Growth.
- **Canada and Manitoba invest in dairy industry research technology** – The governments of Canada and Manitoba are partnering to [invest more than \\$1.4 million](#) to expand scientific research capacity at the University of Manitoba's Glenlea Research Station dairy barn. Funding will allow the University of Manitoba to expand its dairy facility through a repurposed swine barn and to install a new automated milking system, free stalls for dairy cattle, dedicated spaces for calves, milk collection tanks, above-ground manure storage, new flooring, and related laboratory equipment.








NEWS AND OPINION HIGHLIGHTS

- **BC forestry sector maintains strong performance** – BC's top three forestry companies, Canfor Corp., West Fraser Timber, and Interfor Corp., [reported second quarter earnings](#) that were stronger than the first quarter of 2017. The BC wildfires have decreased overall lumber supply, which has fuelled higher lumber prices, and helped these forestry companies to absorb the softwood lumber duties set by the US earlier this year. BC producers are also benefitting from tight supplies and higher priced lumber in the US and China.
- **Technology companies in BC secure four of the top 10 Canadian venture capital (VC) deals in Q2 2017** – The Canadian Venture Capital and Private Equity Association (CVCA) announced that four [BC tech companies made the list of Canada's top 10 VC deals](#) in the second quarter of 2017. Respectively closing the third, fourth, sixth, and ninth place for largest VC deals in Canada were Vision Critical, Visier, Aurinia Pharmaceuticals, and D-Wave Systems. The companies raised a combined value of \$231 million to pursue their endeavours.
- **AltaGas signs export deal with Japanese company** – Calgary-based AltaGas Ltd. has [signed a deal](#) which will see Tokyo-based Astomos Energy Corp. buy half of the liquefied propane gas produced by Altagas at its Ridely Island Propane Export terminal near Prince Rupert, British Columbia. The terminal is currently under construction and is expected to be in service by the first quarter of 2019. According to AltaGas, the value of the deal could grow to \$500 million per year and could boost Canadian exports to Japan by up to seven percent per year.
- **AIMCo acquires solar assets** – In partnership with US-based AES Corp, the Alberta Investment Management Corp (AIMCo) has [acquired](#) sPower, the largest private owner of operating solar assets in the US, for \$1.6 billion. sPower owns and operates over 150 utility and commercial distributed solar and wind electrical generation systems found across 11 states and 74 cities.
- **TransCanada to expand the Canadian Mainline pipeline** – Calgary-based TransCanada Corp. is [planning](#) to expand the Canadian Mainline pipeline, which carries natural gas from Alberta and Saskatchewan to Ontario and beyond. The \$160 million expansion will increase capacity of the natural gas pipeline to help meet rising demand in southern Ontario and Atlantic Canada. The company will apply to the National Energy Board in early 2018 to meet a November 1, 2019 in-service date.
- **Enbridge begins construction of its Line 3 replacement pipeline in Saskatchewan** – Enbridge Inc. has [begun construction on the first phase of its Line 3 replacement pipeline](#), which runs from Hardisty, Alberta to Gretna, Manitoba. The first phase includes 405 kilometres of pipeline in Alberta and Saskatchewan. According to Enbridge's vice-president of liquids pipelines, roughly half of the 1,600 individuals who will work on the project this summer will be based in Saskatchewan. In addition, most of the steel to be used in the Line 3 Replacement project will be manufactured by Evraz North America in Regina. Enbridge also estimates that the Line 3 Replacement will provide benefits totalling roughly \$50 million to Indigenous communities in 2017.
- **BHP has delayed completion of the Jansen potash mine** – BHP (formerly known as BHP Billiton) announced it will not be asking its board for approval to complete the Jansen potash mine in Saskatchewan this year. BHP is reportedly [considering options to share risk and reduce exposure](#) in the development of the mine, including selling up to a 25 percent stake in the project. The sale valued at close to US\$2 billion is expected to attract interest from global players, including firms from China and India. The project, which is partially complete, has an estimated total cost of \$14 billion USD. To date, BHP has committed \$3.8 billion USD to the mine.
- **Red River College Receives WD Funding** – Minister Bains announced [\\$10 million in funding over five years](#) for Manitoba's aerospace and advanced manufacturing sectors. The funds will be used to expand the Centre for Aerospace Technology and Training (CATT) and create a new space for the "Smart Factory" at Red River College (RRC) in Winnipeg. The Smart Factory will provide equipment and technological support to aerospace and specialized manufacturing within the province. CATT, a collaboration between RRC and industry, tests new processes and materials for the industry.
- **New Flyer wins new contracts** – Winnipeg-based New Flyer Industries, the largest transit bus and highway coach manufacturer in North America, has [won a contract with the City of Edmonton](#) for 110 clean diesel heavy-duty transit buses with an option to purchase an additional 120. In addition, it has been awarded a contract extension with the City of Winnipeg for 70 Xcelsior® clean diesel heavy-duty transit buses. To date, the company has reported a 40.7 percent increase in net earnings compared to 2016.



KEY ECONOMIC INDICATORS

	 British Columbia	 Alberta	 Saskatchewan	 Manitoba	 Canada	Last Update
Gross Domestic Product						
Real GDP ¹ (2007 \$billions, forecast)	\$225	\$301	\$60	\$58	\$1,726	2017
% ch. from year earlier	2.7%	4.3%	2.7%	2.8%	2.9%	
Labour Market						
Employment (SA, thousands)	2,480	2,287	568	649	18,444	Aug-17
Change from previous month	-1.2	2.3	0.1	0.3	22.2	
% ch. from previous month	0.0%	0.1%	0.0%	0.0%	0.1%	
% ch. from year earlier	3.9%	1.5%	-0.2%	2.5%	2.1%	
Unemployment Rate (SA,%)	5.1%	8.1%	6.4%	4.9%	6.2%	Aug-17
percentage points from previous month	-0.2	0.3	-0.2	-0.1	-0.1	
percentage points from year earlier	-0.4	-0.4	-0.1	-1.1	-0.8	
Regular EI beneficiaries (SA)	49,740	69,740	18,470	14,830	517,200	Jun-17
Change from previous month	-950	-2,410	-160	-140	-7,010	
% ch. from previous month	-1.9%	-3.3%	-0.9%	-0.9%	-1.3%	
% ch. from previous year	-4.6%	-14.9%	7.8%	-2.0%	-6.8%	
Average weekly earnings	\$944.56	\$1,131.87	\$1,001.53	\$897.79	\$973.52	Jun-17
Change from previous year	\$16.96	\$14.10	\$11.79	\$6.09	\$17.04	
Prices						
CPI (y/y)	1.9%	1.0%	0.8%	0.9%	1.2%	Jul-17
CPI (y/y) previous month	1.7%	0.4%	0.5%	0.2%	1.0%	Jun-17
Consumers and Business						
Retail Sales (SA, \$millions)	\$7,156	\$6,866	\$1,641	\$1,617	\$48,992	Jun-17
% ch. from previous month	1.9%	1.0%	-0.1%	-3.4%	0.1%	
% ch. from previous year	12.4%	10.5%	1.0%	1.6%	7.3%	
Manufacturing Sales (SA, \$millions)	\$4,195	\$5,946	\$1,288	\$1,578	\$53,938	Jun-17
% ch. from previous month	0.9%	-2.0%	-1.9%	6.0%	-1.8%	
% ch. from previous year	12.0%	12.9%	10.7%	11.9%	6.2%	
Building Permits (SA, \$millions)	\$1,409	\$1,028	\$147	\$238	\$7,922	Jul-17
% ch. from previous month	4.8%	-6.5%	-27.3%	-26.4%	-3.5%	
% ch. from previous year	35.5%	-9.0%	-13.9%	3.2%	12.4%	
Housing Starts (SAAR, thousands)	38	26	7	7	223	Aug-17
% ch. from previous month	-20.5%	-21.6%	30.7%	45.7%	0.6%	
% ch. from previous year	4.9%	32.9%	9.6%	52.0%	21.5%	
International Trade						
Merchandise Exports (\$millions)	\$3,412	\$7,648	\$2,117	\$1,045	\$37,223	Jul-17
% ch. from previous month	-8.0%	-6.5%	-2.9%	-14.2%	-15.0%	
% ch. from previous year	-0.7%	23.8%	5.6%	0.6%	3.9%	
Merchandise Imports (\$millions)	\$4,493	\$2,203	\$946	\$1,608	\$44,146	Jul-17
% ch. from previous month	-2.0%	-14.7%	-12.6%	-16.0%	-14.2%	
% ch. from previous year	6.5%	17.0%	24.3%	9.0%	4.8%	
Demographics						
Population (estimate)	4,789,221	4,291,980	1,161,365	1,332,629	36,591,241	Q2 2017
% ch. from previous year	1.3%	1.4%	1.4%	1.6%	1.2%	
Largest Cities (CMAs)	Vancouver (2,548,740)	Calgary (1,469,341)	Saskatoon (315,150)	Winnipeg* (811,874)		2016
	Victoria* (370,899)	Edmonton* (1,392,594)	Regina* (247,224)			

* Provincial Capital

¹ Real GDP at basic prices, forecast (Conference Board of Canada Provincial Outlook Executive Summary: Summer 2017)

SA - Seasonally adjusted

SAAR - Seasonally adjusted at annual rates

Sources: Statistics Canada and Conference Board of Canada



UPCOMING EVENTS

Event	Description	Location	Date
BRITISH COLUMBIA			
Business Excellence Series: FinTech	A conference organized by Business in Vancouver (BIV) to help SMEs make informed decisions in the FinTech landscape.	Vancouver, BC	September 12, 2017
Export Essentials: The New Canadian Free Trade Agreement - How to Trade with Other Provinces	Small Business BC will host a seminar to help businesses understand how they can leverage the Canada Free Trade Agreement to export their products and services to new markets across Canada.	Vancouver, BC	September 14, 2017
Shaping the Future of Canada-U.S. Trade: Optimizing Canada's Advantage	The Greater Vancouver Board of Trade will host a talk featuring Gervais Jacques, Managing Director, Atlantic Operations, Rio Tinto, on supply chain benefits for BC businesses. He will then be joined by CEO of the Canadian-American Business Council and political media personality, Scotty Greenwood, to discuss expectations on NAFTA negotiations.	Vancouver, BC	September 18, 2017
Inclusive Business Forum: Leveraging Opportunities to Innovate Human Capital	The Greater Vancouver Board of Trade will host its inaugural Inclusive Business Forum to assist local companies identify talent management strategies.	Vancouver, BC	September 21, 2017
Canadian Mining in a Changing World	The Greater Vancouver Board of Trade is hosting Pierre Gratton, President and CEO of the Mining Association of Canada, to discuss opportunities for the growth of sustainable mining in BC and across Canada.	Vancouver, BC	September 29, 2017
Vancouver Island Economic Summit 2017	The Vancouver Island Economic Alliance will host a forum for businesses and stakeholders in Nanaimo on how to champion Vancouver Island in the Global Marketplace.	Nanaimo, BC	September 29, 2017
2017 Fastest Growing Companies Reception	Business in Vancouver will host a networking reception to highlight the achievements of companies across BC who have shown remarkable growth over the past five years.	Vancouver, BC	October 11, 2017
4th Annual Greater Vancouver Board of Trade Show	The Greater Vancouver Board of Trade Show offers networking opportunities for businesses and individuals, including speeches from industry leaders.	Vancouver, BC	October 24, 2017
Trade Forum 2017: Opportunities in an Uncertain Global Economy	The Greater Vancouver Board of Trade will host a half day conference to bring together trade policy experts, business thought-leaders, senior government officials, and media to discuss the future of NAFTA, trade in the Pacific Rim, European trade, and the Pacific Gateway.	Vancouver, BC	October 27, 2017
BC Business Summit 2017: Scaling Up British Columbia	The Business Council of British Columbia will host business, First Nations, academia and community leaders, and decision makers from across the province to explore strategies for scaling up the size, talent, competitiveness, and influence of businesses in British Columbia.	Vancouver, BC	November 1, 2017
ALBERTA			
National Gathering of Elders 2017	The first national gathering of elders from all Indigenous groups of Canada. A chance for Indigenous and non-Indigenous communities to find common ground	Edmonton, AB	September 11-14, 2017



	promoting environmental responsibility and cultural preservation.		
Opportunities North	An Edmonton North Partnership event focused on creating and expanding economic opportunities and partnerships between northern and southern businesses and organizations. Topics will cover business, agriculture, education, tourism, transportation, and healthcare.	Edmonton, AB	September 12-14, 2017
EconoUS2017 - Innovation For Shared Prosperity	A workshop event organized by the Canadian CED Network (CCED) to connect and inspire social innovators from across Canada who share a passion for creating inclusive community economic development.	Calgary, AB	September 13-15, 2017
Health And Life Sciences Showcase	An event featuring educational seminars, pitch presentations, roundtables, vendors, and BioAlberta's annual awards gala.	Edmonton, AB	September 20, 2017
Banff Venture Forum	A showcase of hi-tech companies from across North America offering insight into key issues within the industry. A premium networking opportunity and a chance to learn from world-class professionals in the investment community.	Banff, AB	September 21-22, 2017
Aboriginal Business Match (ABM)	ABM allows business connections to be made by eliminating geographic barriers, condensing time requirements, and reducing costs.	Enoch, AB	September 25-27, 2017
2017 Alberta Climate Summit: Seizing Innovation And Opportunity In A Low-Carbon Economy	The event, hosted by the Pembina Institute, will bring together 500+ thought leaders from industry, government, environmental NGOs, and community stakeholders to learn from success stories, identify opportunities and challenges, and explore solutions related to Alberta's clean energy future.	Calgary, AB	September 28, 2017
Rural Alberta Innovation and Learning (RAIL) Commons	The RAIL commons conference is focused on rural economic and community development. It is attended by councilors, mayors, CAOs, EDOs, community development professionals, and students from across the province.	Olds, AB	September 29 - October 1, 2017
2017 Canadian Inland Ports Conference	The event will investigate the economic and societal importance of existing inland ports and demonstrate the potential economic impact of these inland ports within their region and Canada.	Calgary, AB	October 4-5, 2017
2017 Calgary Energy Roundtable	The event brings together industry and government leaders to discuss Canada's energy future.	Calgary, AB	October 11, 2017
Second Richard Marceau Energy Symposium	Hosted by the Bowman Centre for Sustainable Energy and Petroleum Technology Alliance Canada (PTAC) to move forward on nation-building sustainable energy projects.	Calgary, AB	October 11-12, 2017
CERI 2017 Electricity Conference	The conference will discuss the opportunities and challenges of greening the Canadian electricity system.	Calgary, AB	October 16-17, 2017
2017 International Aboriginal Tourism Conference	A community-led, industry-driven, international tourism conference which brings together Aboriginal and non-Aboriginal tourism entrepreneurs & community leaders.	Calgary, AB	November 6-8, 2017
Spark 2017	Hosted by Emissions Reduction Alberta and Alberta Innovates, the conference connects researchers, innovators, investors, experts, and innovation advisors to advance clean technology and bioindustrial solutions toward commercialization.	Edmonton, AB	November 6-8, 2017



National Summit on Indigenous Youth and Natural Resource Development	Hosted by the Conference Board of Canada the event will bring the perspectives, needs, and aspirations of Indigenous youth to the forefront of Canada's discourse on sustainable natural resource development.	Calgary, AB	November 21-22, 2017
2017 Alberta Export Awards	The Alberta Export Awards recognize the innovative approaches and unique contributions of Alberta-registered export companies across all regions of the province.	Calgary, AB	November 23, 2017

SASKATCHEWAN

Saskatchewan Indigenous Business Forum	The forum seeks to bring together Indigenous youth from Fort Qu'Appelle, SK across the province and industry leaders for a day of networking and education with a focus on Indigenous youth, entrepreneurship, and economic diversity.	Fort Qu'Appelle, SK	September 11, 2017
EDCE Entrepreneurial Development Conference and Expo	The event offers insights and opportunities for small business owners and entrepreneurs. It includes over 20 sessions, workshops, and presentations from top industry experts, an interactive small business expo, and 3 one-on-one networking events.	Saskatoon, SK	September 15-16, 2017
Economic Update with Senior Vice President & Chief Economist of TD Bank Group	The Regina Chamber of Commerce is hosting Beata Caranci, Senior Vice President & Chief Economist of the TD Bank Group for an Economic Update.	Regina, SK	September 15, 2017
Lunch with Deputy Governor of the Bank of Canada	The Saskatoon Regional Development Authority is hosting a lunch with Timothy Lane, Deputy Governor of the Bank of Canada. Deputy Governor Lane will deliver a speech about competition and innovation and its importance for Canada.	Saskatoon, SK	September 18, 2017

MANITOBA

International Downtown Association (IDA) 63rd Annual Conference and Tradeshow	Winnipeg will host the 63 rd Annual Conference themed "AuthentiCITY". The tradeshow will be the place for practitioners to study best practices, explore new ideas, network, and share solutions on transforming cities into healthy and vibrant urban places.	Winnipeg, MB	September 13-15, 2017
Projectworld Business Analyst World Winnipeg	A unique industry-leading event that empowers Project Management and Business Analysis professionals with the skills to take their careers to the next level. The Workshops look deeper into Lean, Six Sigma, Agile Environments, Leadership, and Essential Tools.	Winnipeg, MB	September 18-21, 2017
Agricultural Bioscience International Conference	A premier global meeting promoting innovation in bioscience to ensure sustainable food, feed, fibre, and fuel security as the climate changes.	Winnipeg, MB	September 25-28, 2017
Global Forum 2017: Shaping the Future	The Global Forum is an independent, high profile, international, non-for-profit event dedicated to business and policy issues affecting Digital Society. This is the first time in 25 years the forum will be held in Canada and will include more than 300 key policy-makers as well as public/private stakeholders from more than 30 countries.	Winnipeg, MB	October 2-3, 2017
Southern Manitoba Manufacturers' Summit	This annual event provides a forum for Southern Manitoba manufacturers of all sizes and sub-sectors to explore a balanced approach to long-term social, environmental, and economic objectives.	Morden, MB	October 26, 2017
The Hemp Fest Cannabis Expo	The Expo will feature talks and presentations from industry leaders and exhibitors showcasing industry-	Winnipeg, MB	November 4, 2017



	related products and services, including licensed Producers, Dispensaries, Nutrient companies, Hydroponics Manufacturers, Medical Clinics, and Health and Wellness providers.		
Western Business Outlook 2018	The Conference Board of Canada will present its forecast into 2018 and beyond.	Winnipeg, MB	November 7, 2017
Grain World Conference	The conference will feature panelists and expert speakers from the grain industry and provide global networking opportunities with influential delegates in the agricultural sector.	Winnipeg, MB	November 14-15, 2017
Innovating at the Speed of Light	The Winnipeg Chamber of Commerce will host a luncheon session featuring Elyse Allan, CEO of GE Canada. The talk will focus on automation of our workplaces, the state of global competitiveness, and what Winnipeg employers and the workforce must learn to thrive in the Digital Revolution.	Winnipeg, MB	November 24, 2017
Western Canada Cleantech Innovation Forum	The forum will feature keynote speakers, plenary sessions, technical concurrent sessions, and a special edition of the Green Dragon's Lair.	Winnipeg, MB	November 29-30, 2017

Western Economic Diversification Canada

The role of Western Economic Diversification Canada (WD) is to improve the long-term economic competitiveness of Western Canada by supporting programs and services that enhance innovation, business development, and community economic development. In addition, the department undertakes policy, advocacy, and coordination activities in order to advance the interests of Western Canada in national economic decision-making.