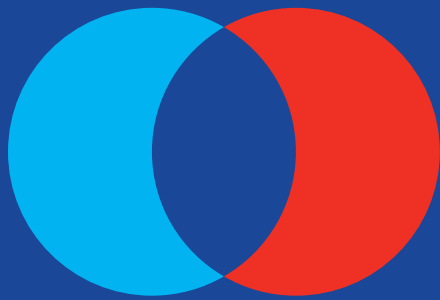


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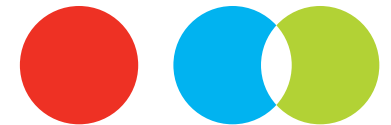


N.W.T. Labour Market Information Resource Module 1

Present Economic Outlook

Issue Briefing | April 1, 2022

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Key Findings

- Several key challenges affect the territorial economy's immediate and longer-term prospects, including COVID-19, a changing mining sector, out-migration, an aging population, and resident skills shortages.
- The Government of the Northwest Territories is working with its partners and stakeholders to spark a territorial knowledge economy. An urgent driver of the territory's desire to invest in new research and education is climate change adaptation.
- The territory's rich Indigenous heritage and collaborative approach to governance requires unique made-in-the-N.W.T. approaches to economic recovery, renewal, and skills transformation. In the context of UNDRIP and reconciliation in Canada, the territory also has an opportunity to lead by example.
- The severity of current economic conditions limits near-term GDP and job growth. More efforts to promote economic diversity and renewal could spur new employment growth.

The Northwest Territories' economy is currently in a vulnerable position, under pressure from COVID-19, a declining mining sector, skills shortages, and out-migration. Key themes for the territorial economy moving forward are sector change, recovery, and renewal.

The COVID-19 pandemic has severely hurt the near-term outlook for the N.W.T. economy. The shutdowns and restrictions on non-essential businesses to protect public health also slowed productivity and brought some industries to a near standstill. Tourism-related sectors, such as accommodations and food services, have been hit the hardest. Compared with the rest of Canada, it may take longer for these industries to recover to pre-pandemic levels.



Public safety amid an unprecedented pandemic is an ongoing cause for concern. Because many Northern communities lack local health care capacity to deal with an outbreak of this magnitude, the Government of the Northwest Territories (GNWT) and its partners have taken a more cautious approach than larger provincial governments. While prudent, this also means that the territorial economy could take longer to recover as businesses are delayed from reopening.

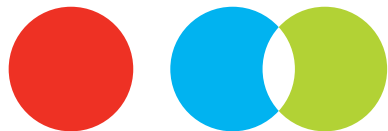
The economic shock of COVID-19 amplifies the serious contraction that N.W.T. experienced in 2019 following two years of weak growth. The contraction marked the largest decline in real territorial GDP since 2011 (while nationally, Canada's GDP that year increased by 1.9 per cent).¹ Two major causes of the contraction were a 38 per cent drop in diamond mine production and the completion of major projects, including the Stanton Hospital Renewal and pipeline repairs at Norman Wells.²

¹ Wawzonek, "Budget Address 2021-2022," 3.

² Ibid.

As a result, the economic outlook for the Northwest Territories is presently weaker when compared with the outlooks for Nunavut, Yukon, and most other regions of Canada. Real GDP in the territory is estimated to have contracted by 14.1 per cent in 2020, and we expect the territorial economy to continue to struggle over the near term—especially as diamond production continues to decline.

The labour market outlook for the Northwest Territories is, however, less grim than the outlook for real GDP. Because the territory's mining sector is a much larger contributor to GDP than to jobs, weakness in the global diamond industry does not have as sizable an impact on employment in the Northwest Territories. But due to COVID-19 and other constraints, annual job levels are expected to remain below 2019 figures for all major sectors of the labour market well into 2025—except for construction and public administration. Jobs in commercial services, for example, dropped more than 9 per cent in 2020 over the previous 2019 total of 4,900. That sector—which includes tourism-related industries, such as accommodations and food services—accounted for about one-fifth of all jobs in the territory in 2019. Such losses erode the territory's local economic resilience.



A Changing Mining Sector

The price of diamonds, a crucial driver of the Northwest Territories' GDP, has substantially declined over the past decade. The territory's diamond production has also reached its peak, as indicated by mining plans issued for the territory's big three mines, Gahcho Kué, Diavik, and Ekati. To renew itself, the sector needs fresh opportunities for exploration and project development. There is currently a dearth of new projects in the territory's resource pipeline. Since 2015, the N.W.T.'s share of total Canadian exploration and appraisal expenditures has been in decline, going from 5.5 per cent in 2015 to 4.5 per cent in 2018 and 1.7 per cent in 2020.³ In terms of recent dollar amounts, expenditures on mineral exploration and deposit appraisal in the territory dropped from C\$112 million in 2018 to an estimated C\$79.8 million in 2019. As of February 2021, the preliminary estimates for 2020 had dropped further to C\$35.4 million. While expected spending intentions for 2021 rebounded slightly to C\$47.7 million, that is still well below even 2019 levels.⁴

The past three years have therefore seen intensified change and a need for new opportunities in the mining sector. While diamonds represented just over half of the territory's exploration and appraisal expenditures in 2018 and almost half in 2019, they accounted for less than 20 per cent of spending intentions in 2020, overtaken by interest in precious and base metals.⁵

³ Ibid., 16.

⁴ Natural Resources Canada, "Table 02 - Exploration Plus Development."

⁵ Wawzonek, "Budget Address 2021-2022," 16.

Opportunities for sector renewal are linked to the global green economy, emerging technology, and strengthening demand for base metals and rare earth elements. In early 2020, Canada and the United States released a Joint Action Plan on Critical Mineral Collaboration, which highlights North America's need for secure access to rare earth elements that are "critical to economic and national security."⁶ This shifting strategic context and cooperation with the United States and other nations could help to entice increased exploration and investment in new N.W.T. mines.

In recent years, the Canadian Arctic has attracted interest from foreign investors, including major Chinese firms that are eager to secure access to its untapped mineral wealth. In December 2020, however, the federal government signalled that Chinese investment may no longer be welcomed in Canada's North, as it blocked the C\$230-million sale of TMAC Resources and its Hope Bay gold mine to China's state-owned Shandong Gold Mining Co. Ltd.⁷ In this case, TMAC ended up accepting a stronger offer from Agnico Eagle Mines, a global mining presence and operator of two gold mines in Nunavut.

As one observer explained, "potential Chinese investment in the Arctic is complicated by tense relations between U.S. and China."⁸ Such a geopolitical climate may in turn affect potential Chinese investments in other Northern projects, such as the proposed Grays Bay road and port connecting mineral prospects in Nunavut and the Northwest Territories. For the time being, the federal government appears to be committed to moving these particular projects forward.⁹ (Our territorial outlook in Module 5 provides a closer look at future scenarios for the sector through to 2040.)

6 Natural Resources Canada, "Canada and U.S. Finalize Joint Action Plan."

7 Strong, "Ottawa Blocks Chinese Takeover."

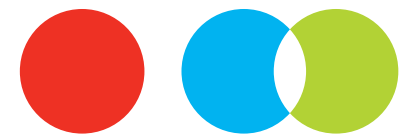
8 Ibid.

9 Ragsdale, "Northern Zinc-Rich Projects Get Boost."

Demographics and Tax Base

The N.W.T.'s population has been relatively stable over the past decade. In 2020, the territory's resident population was estimated at over 45,000, with all growth due to its birth rate and none to immigration.¹⁰ Vital records from July 1, 2019, to July 1, 2020, show 576 births and 247 deaths. The resulting gain of 329 individuals narrowly outpaced a parallel rise in outmigration. During the period, interprovincial migration resulted in a net loss of 309 persons, as 2,239 individuals left the territory and 1,930 moved there.¹¹

Immigration is a key driver of population growth for Canada. But for the Northwest Territories, its northern climate, relative remoteness, and weakened economic prospects present hurdles for immigrants. In this context, population gains in the N.W.T. are expected to be minimal over the next few years, before turning negative in 2029 and staying that way through to 2040. (See Module 5 for further details.) Flat or declining population growth, combined with a lack of new immigrants, implies that labour force and employment growth will be weak or negative. At the same time, those residents of the Northwest Territories who decide to stay will tend to be older and closer to, or into, their retirement years. This combination means that the government will have to finance its public services and programs from a diminishing tax base.



10 Wawzonek, "Budget Address 2021-2022," 9.

11 Ibid.

Aside from its resident population, the N.W.T. has a significant non-resident workforce. This is largely due to the resident labour force's small size compared to the needs of employers, as reflected for example in the territory's mining sector. According to the GNWT's own analysis, from 2007 to 2017, non-resident workers accounted for close to 33 per cent of the territorial labour force and approximately 20 per cent of all employment income created in the territory.¹² This dependence on non-resident workers implies lost consumer spending for territorial businesses and lost revenues for the territorial government. (For further analysis, refer to Module 3 where we take a deeper look at non-resident workers as part of our analysis of the inter-jurisdictional workforce. Module 5 then provides details of our demographic outlook.)

Today, the Government of the Northwest Territories is on relatively solid fiscal ground. However, the continued weakness in economic growth will constrict its tax base, temper population growth, and put pressure on government services. As a result, the government will see its fiscal position erode over the next decade.

Knowledge Economy

The Government of the Northwest Territories is working with its partners and stakeholders to spark a territorial knowledge economy. The World Bank describes the knowledge economy as “an economy in which knowledge is acquired, created, disseminated, and applied to enhance economic development.”¹³ This knowledge economy is sustained by four pillars: education, research and innovation, information infrastructure, and a regime that stimulates innovation and entrepreneurship. Similarly, the N.W.T. Post-Secondary Education Strategic Framework proposes that a “knowledge economy can be broadly defined as an economy that creates, shares, and uses knowledge to enhance its growth and development.”¹⁴

Currently, the GNWT is focusing on research, entrepreneurship, education, and manufacturing. As our analysis in Module 4 indicates, there is a pressing need for innovation in the education sector. And as our occupational forecast in Module 6 indicates, there will be a pressing need for new primary and secondary school educators to replace those who are retiring or leaving the territory. It is also anticipated that Aurora College's transformation into a polytechnic university will play an important supporting role in this exciting new initiative. Manufacturing is another area where the GNWT and its partners plan to make targeted investments. Under current conditions, this sector contributes only a small fraction of territorial GDP and employment. (See our analysis in modules 5 and 6.)



12 Ibid., 11.

13 World Bank, *Building Knowledge Economies*, 23.

14 Government of Northwest Territories, *NWT Post-Secondary Education*.

An urgent driver of the territory's desire to invest in new research and education is climate change adaptation. In December 2015, Canada signed the Paris Agreement, a global effort to curb climate change and restrict temperature increases to at least less than 2°C. To help fulfill this agreement, the Government of Canada submitted its Mid-Century Long-Term Low-Greenhouse Gas Development Strategy. This strategy outlines the government's plan to grow the clean energy sector, pursue electrification and forest and land management, and increase supports for research, development, and innovation.¹⁵ In December 2016, the Pan-Canadian Framework on Clean Growth and Climate Change was adopted. The framework sets an approach for carbon pricing, meeting emissions targets, and strengthening innovation, technology development, and climate change resilience.¹⁶

Warming in the N.W.T. is occurring at three times the global average and causing increased permafrost thaw, changes to water quality and quantity, increased wildfire risk, greater erosion, and the moving north of new species.¹⁷ Climate change is already having an impact on traditional livelihoods in the territory, on the economy, and on infrastructure. In response, the N.W.T. released its 2030 N.W.T. Climate Change Strategic Framework and 2019–2023 Climate Change Action Plan.¹⁸

While a daunting challenge, climate change adaptation presents opportunities for economic renewal and skills transformation. The recent 2030 N.W.T. Climate Change Strategic Framework, for example, summarizes territory-wide commitments to create a low-carbon economy, to build local resilience, and to improve knowledge of climate change impacts. Achieving these goals will require new skills and competencies tied to the potential for new opportunities and occupational roles in a low-carbon economy. It will also require increased territorial research capacity across a range of scientific fields, including geoscience, the life sciences, and engineering. As further identified in the framework, a broad range of industrial sectors will be implicated—from environmental management, to health, to culture and heritage, and to infrastructure. Playing its catalytic role, in October 2020 the GNWT allocated \$2.6 million to support five departments in staffing 14 new full-time and two new seasonal climate change-related positions in Yellowknife, Hay River, Fort Smith, and Inuvik. Budget 2021 plans to continue this work with an additional \$2.6 million.¹⁹

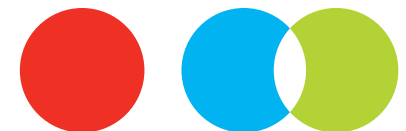
¹⁵ Environment and Climate Change Canada, *Canada's Mid-Century Long-Term Strategy*.

¹⁶ Environment and Climate Change Canada, *Pan-Canadian Framework on Clean Growth*.

¹⁷ Government of Northwest Territories, Environment and Natural Resources, "Climate Change."

¹⁸ Ibid.

¹⁹ Wawzonek, "Budget Address 2021-2022," 10.



Broadband infrastructure is an economic and social catalyst, and reliable high-speed Internet is fundamental to helping the GNWT realize its vision of an N.W.T. knowledge economy.



Indigenous Rights and UNDRIP

In the past four decades, there has been a structural and permanent shift in the way that development occurs in Canada. The Supreme Court of Canada has handed down several rulings clarifying the nature and scope of Indigenous rights. The constitutional and legal recognition of Indigenous rights and Aboriginal title has strengthened the ability of Indigenous groups to direct how their territories are developed. In this context, the Northwest Territories has been an innovator and leader.

In 2016, the Government of Canada endorsed the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) without qualification and committed to its implementation. The Mandate of the Government of the Northwest Territories 2019–2023 committed the GNWT to work with its Indigenous partners on an action plan to advance UNDRIP principles.²⁰ The GNWT wants to adopt UNDRIP and has created a committee to work on moving its mandate forward.²¹ This could have implications for a broad range of economic and social initiatives that require Indigenous consultation and the upholding of treaty rights.

²⁰ Government of the Northwest Territories, Executive and Indigenous Affairs, “United Nations Declaration of the Rights of Indigenous Peoples.”

²¹ Brackenbury, “What Could Implementing UNDRIP Look Like in the NWT?”

A guiding principle of the GNWT for over a decade has been the ideal of “collaborative consent”—a process whereby both Indigenous and non-Indigenous governments commit to working together to ensure they achieve mutual consent around joint policy actions.²² This principle informed the territorial government’s approach to negotiating resource revenue-sharing agreements with its counterpart Indigenous governments and organizations. As a principle, it also provides direction for how to undertake joint actions to improve education and skills deficits in the territory, particularly for the smaller and more remote communities outside regional centres and Yellowknife. (For details on education and skills deficits, see our analysis in Module 4.)



²² Ishkonigan, Inc., *Collaborative Consent*.

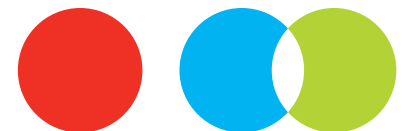
Infrastructure

In 2021, three major infrastructure projects—the Mackenzie Valley Highway, the Taltson hydro expansion, and the Slave Geological Province Corridor—continue to progress. Broadband telecommunications also remain an important theme tied to several key projects. There is the Mackenzie Valley fibre optic link to Tuktoyaktuk, as well as the Tłıchǫ Government’s plan to embed a fibre optic line to Whatı alongside the final work on the Tłıchǫ Highway. The expectation is that these telecommunications projects, alongside those announced by Northwestel in 2020, will enable all the territory’s communities to have high-speed Internet access by 2023.²³ Broadband infrastructure is an economic and social catalyst, and reliable high-speed Internet is fundamental to helping the GNWT realize its vision of an N.W.T. knowledge economy.

Major infrastructure projects help to bolster local construction employment while providing critical facilities that benefit residents and industries. But with limited private sector investment, they also place a strain on the GNWT’s fiscal capacity. The government’s medium-term outlook estimates that under current conditions it will require more debt to pay for infrastructure investments. Under its current assumptions, the GNWT will be only \$76 million below its borrowing limit in 2022–23 and will be over the limit by the end of 2023–24.²⁴

Access to new and innovative financing arrangements from public and private partners is therefore critical. Recently, the Canada Infrastructure Bank (CIB) has emerged as a potential partner. Created as a Crown corporation in 2017, the CIB has a plan to invest \$35 billion of federal funding into revenue-generating infrastructure projects with private and institutional investment. The three-year, \$10-billion Growth Plan, announced in October 2020, will invest in transit, green infrastructure, clean power, broadband, and trade and transportation.

In 2019, the CIB and GNWT entered into an advisory services agreement for the Taltson Hydroelectricity Expansion Project. Under this agreement, the CIB committed to assisting the GNWT in developing the project’s financial structure and business case.²⁵ (A deeper look at infrastructure projects expected to come online in the next 20 years is featured in our Territorial Forecasting Model presented in Module 5.)



²³ Wawzonek, “Budget Address 2021-2022,” 12.

²⁴ Ibid., 11.

²⁵ Canada Infrastructure Bank, “Canada Infrastructure Bank to Work With the Government of Northwest Territories.”

Government Responses to COVID-19

The federal government spent \$74 billion on the Canada Emergency Response Benefit, which provided \$2,000 per month for individuals who lost employment. This program then transitioned into the Canada Recovery Benefit, which ended on October 23, 2021. Budget 2021 also extended the Canada Emergency Wage Subsidy and the Canada Emergency Rent Subsidy until October 23, 2021.

CanNor's Regional Relief and Recovery Fund provided financial support targeting relief and stabilization efforts in key sectors. As part of this, the Northern Business Relief Fund provided grants for operational costs for small and medium-sized territorial businesses, ranging from \$2,500 to \$100,000. The tourism; accommodation and food services; arts, entertainment, and recreation; transportation; and retail sectors were eligible. Applications were received until July 31, 2020, for support through to March 31, 2021.²⁶



²⁶ Canadian Northern Economic Development Agency, "About the Northern Business Relief Fund."

The Northwest Territories is also providing a variety of economic supports.²⁷ Beginning in February 2021, the GNWT introduced a Labour Market Recovery Wage Subsidy, Labour Market Recovery Project Fund, and funding for all N.W.T. communities to hire residents for pandemic response and labour market recovery.²⁸

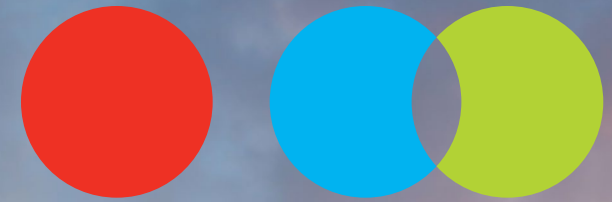
The Northwest Territories Business Development and Investment Corporation (BDIC) provided loans for COVID-19 economic relief of up to \$25,000 to N.W.T. businesses at a rate of 1.75 per cent. BDIC also offered loan deferments until March 31, 2021, without penalty. The GNWT's Support for Entrepreneurs and Economic Development Policy supplemented its regular programming with additional support for N.W.T. businesses for local employment development and community investment that promotes recovery. Small businesses and entrepreneurs can apply for up to \$75,000 through this initiative.

In addition, the GNWT made \$250,000 available for economic recovery funding for artists, film producers, and arts organizations. It also provided rent relief between April 1, 2020, and March 31, 2021, to all holders of existing commercial and mining surface dispositions on public land. And it offered individual assistance, including education loan repayment postponements (holds), a \$750 one-time COVID-19 technology grant, a \$100 monthly COVID-19 support grant, housing and rent support, and modified income assistance until October 31, 2020.

²⁷ Government of Northwest Territories, "Financial Support for Businesses."

²⁸ Government of Northwest Territories, "GNWT Introduces New Labour Market Recovery Supports."

COVID-19 has placed significant pressure across industry sectors, especially those that rely on non-resident workers (such as mining and construction) and consumers from abroad (such as the various sectors that depend on tourism). Our analysis of the inter-jurisdictional workforce in Module 3 takes a closer look at the impacts and countermeasures being taken. See also Module 5 for further details on the industries affected.



Appendix A

Methodology

This research project applied a mixed-methods approach that includes qualitative analysis, cross-sectional data analysis, historical time series, and forecasting.

Our analysis of factors shaping the contemporary Northwest Territories labour market combined quantitative and qualitative research activities. These activities included a collaboration with the Northwest Territories Bureau of Statistics and engagement with Education, Culture, and Employment and other Government of the Northwest Territories (GNWT) stakeholders to access relevant internal reports and administrative data. Specific research activities included:

- A review of academic and grey literature (public policy, industry, etc.) on key labour market issues in the territory and Northern economies. The review included over 400 documents from academic, public (federal, territorial, and Indigenous governments), and private sector sources.
- A review of data sources, including databases maintained by Statistics Canada and relevant federal and territorial government departments.
 - An exploratory analysis of data sets from Statistics Canada, including custom data from the National Household Survey, Census, Aboriginal Peoples Survey, Labour Force Survey, and Canadian Business Patterns.
 - An exploratory analysis of custom data sets from the Northwest Territories Bureau of Statistics (linked to the N.W.T. Community Survey), as well as program data from ECE.

The Conference Board of Canada's Territorial Forecasting Model (TFM) was used to produce three sets of economic forecasts up to the year 2040. The model relies on a core set of consistent assumptions formed from our global, Canadian, and provincial forecasts, in addition to ongoing monitoring of international, national, and territorial events. Specific territorial forecasting assumptions were then developed through engagement with the GNWT, industry experts, and through research of publicly available information on the status of project plans and capital investments in the territory. The forecasts were completed on June 15, 2021.



Definitions

National Occupational Classification System (NOCs) 2016 Version 1.0 Classification System

NOCs Skill Level Criteria

Each skill level represents the type and/or amount of education or training required to enter into and work in an occupation.

| Skill level | Education/training required |
|---|---|
| Skill level A: | These occupations can be classified as either “management occupations” or “professional occupations.” |
| Management occupations | These occupations are characterized by a high level of responsibility, accountability, and subject matter expertise. Expertise can be acquired either through formal education or extensive subject matter expertise. |
| Professional occupations | These occupations require a university degree (i.e., a bachelor’s, master’s, or doctorate). |
| Skill level B: College/apprenticeship training | These occupations usually require college education or apprenticeship training. |
| Skill level C: Occupational training | These occupations usually require secondary school and/or occupation-specific training (up to two years). |
| Skill level D: On-the-job training | These occupations usually revolve around on-the-job training. |

NOCs Skill Type

Each skill type refers to the type of work performed in an occupation or the field of study needed to enter into an occupation.

| Skill type | Description |
|--|---|
| Management occupations | These occupations are considered to be at the top of the organizational hierarchy of workplaces or businesses. Decision-making that affects the organization as a whole, or departments within organizations, is undertaken by management. |
| Business, finance, and administration occupations | This category contains occupations that are concerned with providing financial and business services, administrative, and regulatory services and clerical supervision and support services. |
| Natural and applied sciences and related occupations | This category contains professional and technical occupations in the sciences, including physical and life sciences, engineering, architecture, and information technology. |
| Health occupations | This category includes occupations concerned with providing health care services directly to patients and occupations that provide support to professional and technical staff. |
| Occupations in education, law, and social, community, and government services | This skill-type category includes a range of occupations that are concerned with law, teaching, counselling, conducting social science research, developing government policy, and administering government and other programs. |
| Occupations in art, culture, recreation, and sport | This skill-type category includes professional and technical occupations related to art and culture, including the performing arts, film and video, broadcasting, journalism, writing, creative design, libraries, and museums. It also includes occupations in recreation and sport. |

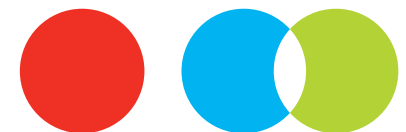
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NOCs Skill Type

| Skill type | Description |
|---|---|
| Sales and service occupations | This skill-type category contains sales occupations, personal and protective service occupations, and occupations related to the hospitality and tourism industries. |
| Trades, transport and equipment operators, and related occupations | This skill-type category includes construction and mechanical trades, trades supervisors and contractors, and operators of transportation and heavy equipment. These occupations are found in a wide range of industrial sectors, with many occurring in the construction and transportation industries. |
| Natural resources, agriculture, and related production occupations | This category contains supervisory and equipment operation occupations in the natural resource-based sectors of mining, oil and gas production, forestry and logging, agriculture, horticulture, and fishing. Most occupations in this category are industry specific and do not occur outside of the primary industries. |
| Occupations in manufacturing and utilities | This category contains supervisory and production occupations in manufacturing, processing and utilities. |

Note: We did not include the occupations in manufacturing and utilities category in our analysis. In all but one year, there were no GNWT employees in these occupations.

Source: Statistics Canada, "Introduction to the National Occupational Classification (NOC) 2016 Version 1.3."



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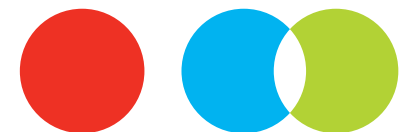
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