



\$1.14 BILLION STRONG:

INDIGENOUS ECONOMIC PERFORMANCE
IN ATLANTIC CANADA

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Definitions

Terminology used in this report includes the following:

- **Attrition Rate** – The rate of reduction in numbers, size or strength.
- **Baseline** – An initial starting point for comparing values.
- **Capital Expenditure** – Payment(s) made in cash or cash equivalents over a period of more than one year to acquire or upgrade property, buildings or equipment.
- **Demography** – The study of birth, death, income, age or other statistics in the context of the dynamics of a given population.
- **Employment** – The impact on employment is measured in person years (PYs) [where a person year is equal to 2,000 hours and defined as a full-time equivalent position (FTE)]. FTEs are calculated on the basis of annual salaries, on an industry-by industry-basis, for the regions considered.
- **Geomatics** – Gathering, storing, processing, modelling and analyzing locational information.
- **Granularity** – Level or scale of detail in a data set.
- **Gross Domestic Product (GDP)** – A monetary measure of the value of all finished goods and services produced in a country or region within a specified period (quarterly or yearly).
- **Gross Expenditure / Total Expenditure** – The total value of all economic transactions associated with the direct spending within the Atlantic Indigenous Economy.
- **Household Income** – The impact on wages and salaries associated with the Person Years (PYs) of employment.
- **Median** – In statistics, the median is the middle value in a sample presented in ascending order. Half of the presented values are above the median and half are below.
- **Metrics** – A standard for measuring or evaluating.
- **Regions of Analysis** – The Input-Output (IO) results provided in this report allow us to provide economic impacts at the following geographical levels: Newfoundland and Labrador, Prince Edward Island, Nova Scotia, New Brunswick, portions of Quebec, the rest of Canada, and all of Canada.
- **Tax Effects** – Estimated changes in federal, provincial, and local taxation as a result of economic activity.

Acronyms

Acronyms used in this report include the following:

AIE	Atlantic Indigenous Economy
AAEDIRP	Atlantic Aboriginal Economic Development Integrated Research Program
APC	Atlantic Policy Congress (of First Nations Chiefs Secretariat)
EDO	Economic Development Officer
GATN	Group ATN Consulting Inc.
GDP	Gross Domestic Product
INAC	Indigenous and Northern Affairs Canada
JEDI	Joint Economic Development Initiative
MCPEI	Mi'kmaq Confederacy of Prince Edward Island
RFP	Request for Proposals

Executive Summary

Study Objective

The primary objective of *Promoting Atlantic Indigenous Economic Performance and Business Partnerships* is to demonstrate the real economic contributions of Indigenous communities and Indigenous business and economic development activities to the broader Atlantic region's economy.

This study is the first of its kind for Atlantic Aboriginal Economic Development Integrated Research Program (AAEDIRP) and Atlantic Policy Congress (APC), and as such, provides both critical economic benchmarks and baseline tools and methodologies. Accordingly, this study also provides a replicable methodology to measure economic performance in the Indigenous economy going forward. The research addresses a significant gap in available information on the outputs and outcomes of the Atlantic Indigenous Economy.

In turn, the study provides important foundational data on the measurement and performance of Indigenous economies and economic development. As such, it serves as a model to others to utilize the economic measurements necessary to increase the awareness and recognition of the Atlantic Indigenous Economy (AIE).

Background on the Atlantic Indigenous Economy

As part of their ongoing efforts, the APC is developing a comprehensive overview of the impact of Indigenous economic development on provincial Gross Domestic Product (GDP) within Atlantic Canada. To date, the APC's work in this area has been foundational.

The 2003 Auditor General's report for Canada noted that, 'there are substantial gaps in key economic indicators such as employment and income between Indigenous and non-Indigenous people in Canada. Closing these gaps would help reduce poverty among Indigenous people, resulting in lower social and financial costs. However, Indigenous communities told us they face barriers to accessing natural resources and capital, to accessing federal business support programs, and to benefiting from federal institutional development programs. These barriers increase their costs of doing business and impede their economic development'.

The Atlantic Indigenous Economy has existed in various forms from pre-contact millennia through to the first interactions with European explorers, company agents and the first non-Indigenous settlers. In more recent times, a sustained practice has emerged of Indigenous collaboration with non-Indigenous interests in the sectors of logging, fisheries, mining and energy, construction and agriculture, among others.

Within the past two decades, the increasing number of Indigenous owned and operated businesses has opened many doors to further partnering and collective enterprise development among businesses, on and off reserve.

The background research conducted by the GATN research team provides a valuable backdrop to the economic analysis. For example, a clear consensus emerged from a wide range of research as

to what constitutes the key features and ingredients around which a successful Indigenous economy revolves. For example, Indigenous community prospects for economic success are increased when:

- Communities make their own decisions on the use of their resources and on their strategies for economic development – the economic sovereignty issue;
- Communities have capable institutional arrangements, that is, stable political structures, a fair dispute resolution mechanism, the separation of business from politics, a competent bureaucracy, and a strategic orientation – good governance; and
- Community institutional arrangements fit the specific cultural identity and unique way of doing things – the Indigenous way.

The literature review confirmed the findings that emerged from our primary research including:

- The diversity of economic activity in which Indigenous communities are engaged;
- The proliferation of Indigenous-owned solo-proprietorships;
- The fact that some Indigenous community members do not recognize that they are business people; and
- Based on demographics alone, Indigenous communities will continue to grow as an economic force while the non-Indigenous population is declining.

Key Findings

The study findings provide clear-cut empirical evidence of the meaningful contribution that Indigenous peoples make to the cumulative economic impact of their local and regional economies.

Atlantic Indigenous Demographics

The registered population of Indigenous communities in the Atlantic region totaled 70,690. **Indigenous communities are considerably younger than the overall population of the Atlantic region. The median age for Indigenous people was 28, relative to 43 for all residents – a difference of 15 years.** The share of Indigenous people (40%) in the youth segment (0-19) is almost twice that of the overall population (22%). Additionally, the demographics highlight a considerable disparity in the 65+ segment. There are relatively few Indigenous seniors (5%) in contrast to the region as a whole (15%).¹

Relative to the general population, educational attainment was generally lower for Atlantic region Indigenous people. For example, one quarter (27%) of Indigenous people received a trade or apprenticeship designation compared to one-third (32%) of the overall population. Moreover, a workforce profile reveals striking differences in the occupational characteristics of the Indigenous

¹ Derived by GATN from data obtained from Indigenous and Northern Affairs Canada, Community Profiles: <http://fnp-ppn.aandc-aadnc.gc.ca/fnp/Main/index.aspx?lang=eng>. Note that values reported at the provincial level and the Atlantic Level are averages of values provided in AANDC's community profiles. Better estimates can only be derived from raw data on each community: raw data was not available to the team.

and overall populations of the Atlantic region. For example, **relative to the overall population, Indigenous employment is considerably lower in management positions (10%); natural sciences and health (3%); and in sales and service (13%) occupations.**

The median household income for Indigenous communities of the Atlantic region was \$34,815 or 35% lower than the regional overall population average of \$53,550. **The percentage of income derived from earnings was comparable for Indigenous people (70%) and the overall population of the Atlantic region (71%).** The share of income from government transfers was higher for Indigenous people (28%), relative to all residents (17%). This is marked contrast to the share of income from other sources for Indigenous people (3%), compared to 13% for all Atlantic Canadian residents.

Atlantic Indigenous Business Activity

Best estimates suggest that approximately 300 Indigenous entrepreneurial businesses operate in Atlantic Canada. Nearly one-third (86) of these businesses participated in an on-line survey to provide a solid foundation on which GATN conducted its analysis. Some of the highlights from this work include:

- Comments from survey participants underscored the opportunities to support economic growth and the capacity of individual businesses through supportive procurement initiatives. This stands as an acknowledgement of the pride and quality inherent in Indigenous businesses. An Indigenous First program would tap into this sentiment, particularly when Bands are undertaking the procurement.
- The variety of business activity among the participating Indigenous enterprises is noteworthy. The geographic diversity and wide range of commercial interests and activities is a clear signal that communities and community members are not limited in the entrepreneurial opportunities they are prepared to consider and pursue.
- The results hint at the impact of Indigenous businesses on the Atlantic Indigenous Economy. The average annual operating expenditure for participating Indigenous businesses was \$350,000. In one case, the operating budget was over \$10 million.
- The research findings punctuate the positive economic interactions taking place between Indigenous communities and their surrounding communities. For example, Indigenous businesses were an important source of employment for both Indigenous people (68%) and non-Indigenous people (32%). This is further illustrated by the significant spending of Indigenous enterprises on outside contractor services within the local area. A high share of the overall spending remains within the local economy.
- The significant annual capital investment for Indigenous businesses is also illustrative of their impact on the local economy. Capital expenditures for all reporting businesses totaled \$1.9 million. Many of the capital expenditures were for significant purchases – with some reaching as high as \$100,000.

Atlantic Indigenous Economic Impacts

Based on findings from a number of surveys, an extensive review of financial documents and custom analysis of Statistics Canada data, it was established that direct spending associated with the Atlantic Indigenous Economy totalled in excess of \$1 billion - \$1,144,000.

This spending originated as follows:

- \$66 million from Indigenous businesses.
- \$246 million from household spending (net of estimated band-run social programming).
- \$730 million from Band spending; and
- \$102 million from organizational spending.

This direct spending occurred across the region as follows:

- \$146 million in direct spending in Newfoundland and Labrador.
- \$44 million in direct spending in Prince Edward Island.
- \$422 million in direct spending in Nova Scotia.
- \$458 million in direct spending in New Brunswick; and
- \$74 million in direct spending in Quebec.

1 Background

The Atlantic Policy Congress (APC) has, for some time, been interested in the Atlantic Indigenous Economy. As part of their ongoing efforts, the APC is striving to develop and outline a thorough and comprehensive overview of the impact of Indigenous economic development on provincial Gross Domestic Product (GDP) within Atlantic Canada. This important study was undertaken to quantify growth and to delineate progress. In providing clear-cut and empirical evidence, the overview also serves a myth-busting function insofar as it dispels the notion that Indigenous peoples do not meaningfully contribute to cumulative economic impact.

During the course of researching and developing its effective 2008 Atlantic Indigenous Economy Strategy, APC noted that, 'there is surprisingly little quality data on the Atlantic Indigenous Economy'. This observation is reiterated in research undertaken by GATN, both in terms of the literature review completed as part of the *Promoting Atlantic Indigenous Economic Performance and Business Partnerships* project, and within the context of other projects GATN has undertaken for Indigenous organizations within Atlantic Canada and beyond.

The 2003 Auditor General's report for Canada² noted that, 'there are substantial gaps in key economic indicators such as employment and income between Indigenous and non-Indigenous people in Canada. Closing these gaps would help reduce poverty among Indigenous people, resulting in lower social and financial costs. However, Indigenous communities told us they face barriers to accessing natural resources and capital, to accessing federal business support programs, and to benefiting from federal institutional development programs. These barriers increase their costs of doing business and impede their economic development'.

Whereas the literature review confirms that there is a paucity of data with respect to the outputs and outcomes of the Indigenous economy, there is, nonetheless, a clear consensus – concluded from a plethora of research projects, studies and analyzes undertaken by a range of academic, private sector and government players – as to what constitutes the key features and ingredients around which a successful Indigenous economy revolves.

Best expressed in the salutary Harvard Project on American Indian Economic Development, (validated through a wealth of case studies on a range of American Indian nations and, in recent years, on similar communities in Canada) the three main conclusions are that Indigenous prospects for economic success are increased when:

- They make their own decisions on the use of their resources and on their strategies for economic development – the economic sovereignty issue;
- They have capable institutional arrangements, that is, stable political structures, a fair dispute resolution mechanism, the separation of business from politics, a competent bureaucracy, and a strategic orientation – good governance; and

² http://www.oag-bvg.gc.ca/internet/English/parl_oag_200311_09_e_12932.html#chghd3a

- Their institutional arrangements fit the specific cultural identity and unique way of doing things – the Indigenous way³.

Thematically, these findings are both broadly referenced and oft-cited in the literature on Indigenous economic development in Canada. Intuitively, these findings make a great deal of sense and, in fact, form the core of the 2008 APC Atlantic Indigenous Economy Building Strategy, examined in more detail below.

Within Canada, the literature focuses more regionally on Indigenous resource development, including forestry and mining (trends that are more predominant in Western Canada). Such research is most often focused on the challenges Indigenous peoples face in exercising control over their traditional territory and on the failed policy of externally-imposed approaches to economic development, which, in many cases, falter and serve to reinforce negative stereotypes about Indigenous peoples and their business practices.

With respect to the future of collaborative efforts around resource development in Canada, a recently tabled report by the Canadian Chamber of Commerce, *Indigenous Edge: How Indigenous Peoples and Natural Resource Businesses Are Forging a New Competitive Advantage* (2015)⁴ postulates that Canada's Indigenous peoples will play an increasingly crucial role in the resource industries. The report also cautions that getting these relationships wrong will take a significant toll on the country's competitiveness.

The national studies tend to focus both on barriers and on what needs to change to ameliorate the current situation. Considerations include policy, legislation, access to capital and own-source revenues, land-tenure arrangements and the restrictive and paternalistic tenor of the *Indian Act*.

National research often includes references to representative Bands and Indigenous communities across the country that have achieved success in economic development and building a robust economy. There are numerous analogues from which a lessons-learned approach can be derived. From an Atlantic perspective, Membertou, Millbrook, St. Mary's, Madawaska, among others, are often cited as leading practice analogues.

Within the Atlantic region, there are some real success stories. One such initiative is the Atlantic inshore fishery. The forward thinking report, *An Atlantic Fishing Tale: 1999 - 2011*⁵ chronicles the success Atlantic Indigenous people achieved upon entering the inshore fishery as a result of the Marshall Decision. As a case study, the Atlantic inshore fishery offers compelling insights into an exemplary Indigenous economic development and wealth creation model. This is a model in which the APC played a significant leadership and stewardship role of which it can be very proud.

³ Source: World Bank and the Harvard Project on American Indian Economic Development

⁴

http://www.google.ca/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=oCB4QFjAAahUKEwjx2IS6meXHAhWBvIAKHa1nC_I&url=http%3A%2F%2Fwww.chamber.ca%2Fdownload.aspx%3Ft%3Do%26pid%3D21afb216-1e45-e511-add8-000c29c04ade&usq=AFQjCNG_d2JUuOB4tMIho5g3IV3Z81qr-w&sig2=J3OOiX4ez2pPVQ_OeCl1tg

⁵ <http://www.macdonaldlaurier.ca/files/pdf/An-Atlantic-Fishing-Tale-February-2012.pdf>

The literature also focuses on the important question as to why some Indigenous communities perform better than others with respect to economic development and economic outcomes – an issue that is particularly germane to the present study.

The literature review conducted by the GATN research team provided a very useful backdrop to the current study. In turn, the present study provides some important foundational data on the measurement and performance of Indigenous economies and economic development. As such, it serves as a model to others.

The study entails an approach that has not been broadly studied or previously utilized. It provides a clear baseline and a rigorous and replicable methodology on which further work can be undertaken, both to gauge progress and to update results. It also provides a tool and the evidence to support advocacy for policy and even for legislative change and, as such, is potentially an invaluable asset to Atlantic Chiefs and Councils and to the APC.

Throughout the literature review, a fine point was placed on research probity and sensitivity in working with informed, consenting and engaged Indigenous communities and research participants. This mirrors a philosophy and a practical ethos to which the GATN team are always very attentive.

A further takeaway from the literature review is the importance of capacity-building and using the shared knowledge and knowledge transfer potential that arises from the studies so as to benefit Indigenous individuals and communities in substantive and tangible ways.

During the course of the study, numerous findings arising from the literature review proved very useful. The requirement of the project's RFP to briefly comment on the current state of Canadian research into the impacts of the Indigenous economy served as both a new learning experience and as a thought-provoking refresher with respect to several key issues. This educational dynamic is reflected in the project's work plan and its methodology.

Like other communities, Indigenous communities in Atlantic Canada differ significantly with respect to:

- Geography and location;
- Access to opportunity;
- Access to a population base sufficiently large to drive robust business operations; and
- Proximity to potential economic partners.

The study provides an overview of Indigenous communities and an orientation to the type and range of economic activities in which they typically engage. It also profiles best-practice models and explores the critical success factors that contributed to the models' many accomplishments.

The report identifies and examines areas of economic activity in which Atlantic Indigenous communities have experienced success and examines what underlies their achievements. As

noted, the Atlantic Inshore Fishery has achieved notable success and is widely recognized as having done so⁶, both nationally and regionally.

An important backdrop to this study is the afore-mentioned APC-led strategy – the *Atlantic Indigenous Economy Building Strategy*⁷. This strategy, reached through a consensus of Atlantic Chiefs, outlines five key principles underpinning the development of an effective Atlantic Indigenous Economy including:

- Self-sufficiency/self-sustainability;
- Self-determination;
- Long term stability;
- Integration with environmental outcomes; and
- Based on the determinants of health.

Extrapolating from these, this report examines the extent to which successes being achieved in Atlantic Indigenous Economy building and nation-building activities reflect these APC strategy principles, both in their design and at their core.

In addition, the study addresses a broad range of research questions, refined in consultation and discussion with AAEDIRP representatives both prior to, and during the course of, project initiation. Questions considered include:

- What do Atlantic Indigenous communities contribute to their respective provincial economies? What are the economic activities of Indigenous communities? What happens as a result of these activities? What are the short-term, medium-term, and long term results?
- What are the impacts on the tax base and tax revenues for the non-Indigenous communities around them?
- How many non-Indigenous people are employed directly and indirectly by Indigenous communities?
- What are the sectors that are supported through the activities of Mi'kmaq communities?
- What is the 'cluster' effect of Indigenous communities on the adjacent areas?
- What has been the level of private sector investment related to initiatives undertaken in partnership with Indigenous communities?
- More qualitatively, what have Indigenous communities contributed to the sustainability and preservation of rural communities across Atlantic Canada? And what has been the contribution of Indigenous communities to the cultural image of Atlantic Canada?
- Are there particular sectoral areas where Indigenous community-based economic development or business activities have greater success? Why is that? What are the implications?

⁶ <http://www.macdonaldlaurier.ca/files/pdf/An-Atlantic-Fishing-Tale-February-2012.pdf>

⁷

[http://www.apcfncc.ca/images/uploads/Atlantic_Indigenous_Economy_Building_Strategy_\(Chiefs_Strategy\).pdf](http://www.apcfncc.ca/images/uploads/Atlantic_Indigenous_Economy_Building_Strategy_(Chiefs_Strategy).pdf)

- What are the institutional and governance factors that distinguish best-practice models and what are the lessons that can be learned from them?
- What are the differences between economic development and business outcomes for urban and rural Indigenous economic development initiatives?
- What can we learn about the economic impact of Band-owned enterprises in terms of their impact on the community and community members?
- What are the challenges and opportunities related to investment attraction, access to capital and retention of potential non-Indigenous investors and what can we learn from the best-practice models?

These questions were addressed using both quantitative and qualitative analysis.

1.1 Study Objectives

The main objective of the study was to demonstrate the real economic contributions of Indigenous communities and Indigenous business and economic development activities to the broader Atlantic region's economy. The project entailed gathering and analyzing key critical data points relating to the economic performance of select Atlantic Policy Congress First Nation Chiefs membership communities and then extrapolating these findings to all communities in order to provide an Atlantic-wide assessment of economic performance. These data included the direct impact of such factors as revenue flow out of Indigenous communities; employment created by Indigenous communities; direct gross domestic product and personal income and spending; indirect impact arising from the supply of goods and services that support supply chain operations; and the induced impact arising from the spending of incomes earned in direct and indirect activities.

The scope of work included:

- Using an Input-Output Model of the Canadian economy to estimate the economic impact of Atlantic Indigenous people to the Atlantic region economy;⁸
- Meeting with select Indigenous communities to obtain the expenditure and direct employment data needed to drive the model;
- Using key economic indicators (GDP, income, employment and taxes) to quantify the direct, indirect and induced economic impacts;
- Preparing a report outlining the impacts and written in clear, non-technical language; and
- Reporting results at regional workshops/conferences.

Additionally, the outreach effort included:

- Individual and linked Indigenous community-specific and regional economic performance indicators highlighting the contribution of Indigenous communities to the Atlantic regional economy;
- Evidence-based data to inform community and government economic policy and program development initiatives;

⁸ The model used featured the option of providing impacts at the Atlantic level, provincial level, and within the province level (e.g., county level or customized region).

- Seeking knowledge that will inform and support Indigenous business growth;
- Seeking knowledge that will support Indigenous and non-Indigenous business partnership development and sustainability; and
- Web-site development and media products to highlight Indigenous economic performance and contributions and to inform and enhance increased partnership and economic development.

The team organized and facilitated six meetings (2 in each of the following locations: Sydney, Halifax, and Moncton) with key stakeholders to address:

- Facilitators and barriers to Indigenous and non-Indigenous business growth and partnerships; and
- Moving forward – knowledge integration and dissemination (implementation of recommendations).

The aim of this study was to collect, through sampling methodology, and to synthesize, community-level economic and business operating and performance related data, and to assemble the resulting composite information into an objective and robust statement of the socio-economic impacts generated by the 37 member communities within the APC.

The study's core elements address the following:

- **Sampling Direct Impacts:** Description of expenditure categories; direct impact of spending by customers of selected Indigenous communities; direct employment income generated by Indigenous communities/effect on GDP; and Indigenous community capital spending and purchasing of regional goods and services.
- **Sampling Indirect and Induced Impacts:** Description of expenditure categories; indirect and induced impact on local and regional employment/effect on GDP; indirect and induced impact of Indigenous communities spending locally and regionally; and tax benefits generated by indirect and induced spending.
- **Sample Summary Of Overall Impacts Extrapolated To All Communities:** Indigenous communities' overall influence on the local and regional economy/GDP; Indigenous communities' economic relationship to other businesses/their host communities (e.g., hospitality, retail, residential, among other influences); Indigenous communities' economic relationship to supporting other cultural organizations (through employment, provision of infrastructure, education / training, other resources).

In addition, the report provides a contextual profile of the Indigenous communities being studied, including their relationship with the surrounding area. Within the Atlantic context, some communities are remote, whereas others are largely proximate to urban areas, factors that create differences in economic opportunities and impact.

The study provides an overview of the research design and the methodology applied. These were finalized in consultation with the project authority and in accordance with the research

requirements outlined in the project RFP. The overall research design is foundational and was a critically important element in conveying the objectivity, neutrality and integrity of the study findings. As well, the research design functions as a research paradigm that can be replicated should AAEDIRP wish to revisit the analysis in the future or to measure progress against the baseline.

AAEDIRP has a variety of stakeholders and the presentation of findings concisely conveys the key metrics resulting from the analysis.

The final report is presented in a high-interest, graphically and visually appealing manner, using easily decipherable graphs, charts, and other communication tools in order to convey the study findings to a diversity of audiences, so that the economic impact of Indigenous communities can be clearly understood.

This study is the first of its kind for AAEDIRP and APC, and as such, it represents both a benchmarking exercise and an opportunity to develop baseline tools and methodologies which, over the course of the project, were rigorously applied, tested and refined. Accordingly, this study also provides an opportunity to create a replicable approach, one that was informed by the lessons learned during the course of developing the initial benchmark performance estimates.

1.2 Research Methodology

GATN took a comprehensive approach in framing the Atlantic Indigenous Economy:

- Extensive outreach to Indigenous communities throughout Atlantic Canada
- Undertaking an approach that was closely coordinated with AAEDIRP, and
- Secured multiple lines of evidence to ensure a robust result.

Specific activities included:

- Deployment of a survey to 165 individuals
- Initial briefing of APC Chiefs
- Extensive consultation and meetings with a broad range of stakeholders in the Atlantic Indigenous community
- Desktop review of annual reports coupled with extensive secondary research
- Outreach to a representative sample of Bands and Band-owned enterprises
- Outreach to Atlantic Indigenous Organizations
- Outreach to Ulnooweg Development Group
- Initiation of a comprehensive social media campaign
- Outreach to Indigenous businesses through meetings and deployment of a comprehensive survey
- Conducting a round of meetings with senior Atlantic Indigenous officials
- Development of tools (web-site, media products, key messages) to showcase results
- Focus on estimating the spinoff / multiplier effects
- Overall focus allowing for both quantitative and qualitative input with the data assembled into a picture of the direct spending generated by communities

Elsewhere in the report, other dimensions of the methodology are noted where reference to the study approach is important to understanding the results.

The cumulative results of all phases of the initial work plan are captured in the final report as an important foundational piece surrounding what serves as a valuable benchmarking study for AAEDIRP and the APC.

Submitted earlier as a working paper, a stand-alone report entitled, *Interim Report: Promoting Atlantic Indigenous Economic Performance & Business Partnerships* provides a composite of all tools and elements of communications and correspondence used in the study, as well as community profiles for the Atlantic Indigenous communities considered.

2 Atlantic Indigenous Community Socio-Demographic Profile

In this section, we provide an overview of the origins of the Atlantic Indigenous Economy, the current context for the study, and an Atlantic-wide socio-demographic summary of Atlantic Indigenous communities.

2.1 Origins of the Atlantic Indigenous Economy

Business partnerships between Atlantic Indigenous communities or with non-Indigenous people are far from being a new or emerging trend in the region; rather they are well-established.

Considered alongside oral traditions, archaeological evidence of trade relations among Indigenous people in North America in the millennia and centuries prior to European contact, presents a picture of a diverse range of early Indigenous societies.

While not the Atlantic Indigenous Economy of current times, early trade was characterized by political and cultural alliances and divisions, diverse tribal laws and varying intertribal contact and exchange systems. In large part, the formation of trade networks was primarily dictated by the ready availability of locally-sourced resources and the need to forge alliances to engage in trade to obtain resources which others possessed. Climate and geography also played a role with respect to how extensive and how far reaching trade alliances occurred. Whereas some peoples forged a mixed subsistence economy in which trade systems played a major role, those dwelling in extremely remote areas (Canada's present day Inuit Nunangat, for example) were less reliant on trade.

Traditionally, Indigenous communities were linked by kinship, friendship and trade. Trade alliances – what we would today call partnerships – were fostered, not only to obtain resources that were not indigenous to a particular area but also to guarantee protection of territory and transportation routes. For example, the Mi'kmaq residing in what is now Nova Scotia engaged in trade with the Malecite (Wolastoqiyik) and Peneboscot (Panawahpskek) in New Brunswick and Maine. Trade alliances also existed with the Montagnais residing on the north shore of the St. Lawrence. Trade with peoples residing further south and west than the present day Maine region was either sporadic or indirect (no contact except through a chain of goods), or in the context of the Iroquois (Haudenosaunee), rare and essentially non-existent.

After European contact, which occurred between 1,000 and 500 years ago, the Mi'kmaq (our example above), entered into sustained trade relations with both French settlers, later known as the Acadians, and with the British.

The Malecite, whose traditional territory includes the 673 km. Saint John River that runs from Somerset County in northern Maine (adjacent to the province of Quebec) to its outlet in the Bay of Fundy at the Reversing Falls near Saint John, New Brunswick, also inhabited areas along the St. Lawrence River. Trade took place with Mi'kmaq to the east and with the Passamaquoddy and Penobscot to the west. Contact with European fishermen and fur traders in the early 17th century resulted in a stable and protracted fur trade network that existed for 100 years. In later years,

wood, bark and basketry items became major trade commodities. In the 21st century, Malecite artisans continue to design and produce high-end products for discerning collectors.

Spending the majority of the year deep in the subarctic and boreal interior of the eastern portion of the Quebec - Labrador peninsula, and frequenting coastal areas sporadically and during the summer months only, the Naskapi Innu (Algonkian people previously known as the Naskapi – Montagnais), engaged in a variety of trade alliances. These occurred amongst Innu peoples living within a vast territory encompassing a broad range of terrain and a variety of ecosystems. Trade took place with other Indigenous groups such as the Wyandot, who inhabited more southern areas of Quebec.

The Innu are considered to be the first North American people to have likely encountered Norse explorers some 1,000 years ago. Archaeological evidence – and in later centuries, written accounts – provide testimony of the Innu interacting with seasonally itinerant Portuguese fishermen, Basque whalers and fishermen, as well as agents and workers engaged by French, Dutch and British trade companies. As occurred elsewhere, contact resulted in the emergence of a Métis population, largely driven by European traders and fishermen who overwintered at trade stations and eventually became permanent settlers.

17th century trade relations with the French and later contact with Moravian missionaries whose primary focus was the Inuit, led to the establishment of coastal Innu communities along the north shore of the St. Lawrence, as well as at Lake Melville, along Ungava Bay and along stretches of coastal Labrador. Exchange of trade goods with French voyageurs took place in advance of commercial trade in furs with agents of the Hudson Bay Company. The latter activity began in the 1830s when the company established its first trading post in Labrador at North West River, a former French trading station.

Until the 1940s, Innu and Metis trappers exchanged furs for dried foodstuffs, canvas tents, axes, guns, metal tools, textiles and other trade goods. Being first and foremost nomadic caribou hunters, many Innu families resisted becoming overly dependent on trapping and European trade goods and chose to pursue caribou hunting rather than the trapping of fur-bearing species.

Innu-Inuit relations were not extensive and sometimes adverse: hence, trade between the two peoples is assumed to be limited. Inuit seal hunters engaged in trade with the Moravians, and in later years, with the Hudson Bay Company.

On the island of Newfoundland and as reported by Englishman John Guy at Cupids, Beothuk-European relations are reported to have commenced *circa* 1612 in Bulls Arm, Trinity Bay. Initially, trade was conducted by means of the silent barter method, wherein the trade parties did not have contact with each other: the Beothuk traders displayed furs by suspending them from poles and the English traders then collected the pelts, leaving behind what they considered to be fair exchange goods.

Indigenous communities provided European traders with critical life sustaining assistance and delivered what was, essentially, survival and skills development training. This took place against the background of providing the newcomers with supplemental food, herbal medicines and

introducing the Europeans to traditional healing practices. Trading furs and skins, Indigenous people, in what is now Atlantic Canada, accessed European-made goods including metal axes and knives, metal fishing implements, copper cooking pots and muskets. Somewhat later, European trade goods came to include dried beans and other non-perishable foodstuffs, textile items and glass beads. As time went on, European and North American markets emerged for finely wrought Indigenous artisan items, such as Mi'kmaw quillwork and beadwork.

2.2 The Modern Atlantic Indigenous Economy

More recently, a sustained practice emerged of Indigenous people collaborating with non-Indigenous interests in the sectors of logging, the fisheries, mining and energy, construction and agriculture (harvesting). Within the past two decades, the increasing number of Indigenous owned and operated businesses has opened many doors to further partnering and collective enterprising amongst businesses both on and off reserve.

As evidenced time and time again, there is no single formula for approaching joint business ventures.

Today, each partnership is situation-specific and reflects the distinctive contexts and nuances of both partners and their cultural, socio-economic and community-driven circumstances. In entering into business partnerships with Indigenous people, non-Indigenous interests benefit from: access to new labour pools that are eager to acquire new skills; tax benefits; resource opportunities, as well as the opportunity to share investment, responsibility and capacity building. In turn, Indigenous communities benefit from: heightened employment prospects; training; partnering with long-established corporations; potentially greater access to capital; broader markets opportunities and the opportunity to promote themselves further afield.

This rich history, the growth in Indigenous business and their favourable demography underscores the potential impact of Atlantic Indigenous communities economically. According to the MacDonald-Laurier Institute⁹, the national Indigenous economy 'will [soon] be among the largest corporations in Canada with billions in assets'. As illustrated in this study, this is particularly apparent in the Atlantic region, where Indigenous communities are increasingly becoming more strategic, competitive and profitable in their development projects and agreements.

2.3 Study Context

This study has been undertaken at an interesting time in terms of the economic development of Indigenous communities across Atlantic Canada and highlights the similarities and differences among the communities themselves, as compared to the non-Indigenous population.

⁹ <http://www.macdonaldlaurier.ca/Indigenous-canada-could-use-come-compassionate-conservatism-brian-lee-crowley-in-the-citizen/> Brian Lee Crowley (twitter.com/brianleecrowley) is the Managing Director of the MacDonald-Laurier Institute, an independent non-partisan public policy think tank in Ottawa: www.macdonaldlaurier.ca

Developments within these communities, though still somewhat uneven across the Atlantic Region, have been trending positively over the past two decades, a phenomenon that is creating momentum and critical mass. There is a confluence of a number of factors supporting this trend including:

- Growing capacity at the community level to lead more complex and ambitious projects including specific sector development successes in, for example, the inshore fishery, in forestry and in renewable energy;
- A growing sophistication and deliberateness in reaching agreements with corporate partners, whether through the negotiation of *Impact Benefit Agreements* or specific project-related business partnerships;
- A growing approach to harnessing the experience, resources and acumen of several Bands simultaneously in commercial activities and initiatives; the so-called 'collective commercial' approach, where it makes sense to do so from a business perspective and where the results are scalable;
- Jurisprudence is helping by clarifying and interpreting Indigenous rights and title in ways that enable and support economic development and greater self-sufficiency by Bands growing their own-source revenues;
- More diverse and sophisticated approaches to land management practices that serve to offset the limitations the *Indian Act* can impose on access to capital and economic activity;
- A more sophisticated approach to governance including the creation of economic development corporations that provide the means to develop and lead more complex projects in a manner that separates politics from economic development;
- General improvement in education outcomes and the recognition that Indigenous peoples can be an important source of labour supply in coming decades.

Within the Atlantic Region, the following are important contextual factors to consider in the assessment of the Atlantic Indigenous Economy.

- **Broad Diversity of Economic Circumstances** – Indigenous communities across Atlantic Canada face a wide range of differing economic circumstances. Some communities are co-located within or proximate to larger urban centers, while others are relatively remote. Those closer to larger populations/higher traffic tend to have more opportunities for economic development. Likewise, those that are near or have been located near resource development / major project sites have a relative advantage to those that are not, providing resource development / major project opportunities including provisions to work with nearby Indigenous communities. Also, communities across the region differ in their relative position along their own economic development trajectory, with some

having large and thriving economic development corporations and others being in the early stages of creating the corporate and administrative infrastructure to leverage economic development opportunities;

- **Demography** – While Indigenous communities across the country generally enjoy more favourable demography, as referenced above, the situation in Atlantic Canada accentuates this point more compellingly than elsewhere. The fundamental demography of Indigenous communities across Atlantic Canada is significantly more favourable than the rest of Atlantic Canada, an advantage that is particularly important in an Atlantic context which is one of the oldest regions in Canada. Indigenous communities are younger, have larger families and tend to want to remain within their community. As a growing share of the overall population, these communities can support a variety of economic development goals for both Indigenous-owned and non-Indigenous owned enterprises;
- **Increased Capacity** – Related to a point above, the capacity of Indigenous communities to leverage opportunities is increasing. The communities themselves are becoming more sophisticated when it comes to economic development goals and the tools and systems they are put in place to achieve these. Where reliance on outside support had been the norm, we are seeing an increasing number of Indigenous community members with the capacity to develop and lead more sophisticated businesses across a broad range of sectors.

Beyond these factors, throughout the study, the team was constantly reminded that in some cases Indigenous communities and their economic development activities are having a significant impact on adjoining municipalities. This is particularly true in more urban setting. At a time when municipalities are being ‘hollowed out’ as a result of outmigration, the aging of the population and declining tax bases, economic activities in Indigenous communities are creating an economic stimulus.

Another point that came up repeatedly, particularly, during meetings with stakeholders, is the fact that Indigenous people tend to spend their money quickly. There is often a differential in disposable income levels among Indigenous vs. non-Indigenous individuals. Stakeholders pointed out that this often results in Indigenous community members tending to spend more directly on everyday requirements. It was consistently pointed out that this both catalyzes local economic impact and also presents an inducement to Indigenous entrepreneurs and businesses to provide these goods and services on reserve, thereby reducing the ‘leakage’ to non-Indigenous community areas.

Going forward, another dimension of economic activity that is projected to grow in the future is Band-led housing and infrastructure developments. With a new federal focus on Indigenous housing and infrastructure and increased funding, there is an opportunity for Indigenous communities to leverage the procurement opportunities associated with these developments to maximize local economic benefits by supporting Indigenous companies and entrepreneurs. There is also an opportunity to ensure a greater volume of local employment, including the opportunity for Indigenous apprentices to be able to achieve their certification by working on these projects.

Overall, the consultant team concluded that the cumulative effect of all of the above factors is very promising and has the potential to improve upon what are already impressive results related to the economic impact of Indigenous communities as identified in this study.

Appendix A provides a detailed overview of the socio-demographic attributes of the Atlantic Indigenous communities, profiled in the context of similar attributes for the overall population for Atlantic Canada, the four provinces, and parts of Quebec, considered in this study as the traditional lands of the Atlantic Indigenous communities.

3 Findings from Outreach Efforts

The outreach strategy employed in the research was designed to inventory, target, and collect both primary data (new information and data created during this study) and secondary data (data that has already been collected by other organizations and is available as background information).

In an effort to ensure optimal engagement and to provide comprehensive feedback, the research team utilized a diversity of channels to secure input, including focus groups, interviews (e.g., with Indigenous business owners and Economic Development Officers (EDOs), surveys (e.g., of Indigenous business owners), and interviews with key administrative data gatekeepers, such as those listed above (Band Finance Departments / Economic Development Officers/Departments).

Ultimately, the outreach efforts combined personal interviews, data mining of existing sources, extensive use of social media, the creation of a project website, two rounds of regional meetings and a number of other formal and informal presentations/colloquia with regional stakeholders.

In support of this effort, a number of data collection tools and deployment strategies were developed, including interview guides, the design and deployment of an online survey, and a number of communications – such as letters to inform, requests for information, permission releases – employed as part of the overall strategy to obtain required feedback from key stakeholders.

In this section, we present the high-level findings of the stakeholder engagement efforts and outreach methods employed.

3.1 Study Participants

Study participants can be grouped into several key categories. The first category includes the communities selected at the outset with the project authority for detailed examination. These communities included:

New Brunswick:

- Elsipogtog
- Esgenoopetitj
- Madawaska
- Metepenagiag
- St. Mary's
- Eskasoni
- Glooscap
- Membertou
- Millbrook
- Waycobah

Nova Scotia:

- Acadia
- Prince Edward Island:
- Abegweit
- Lennox Island

These were selected as being representative of Atlantic Indigenous communities throughout the region in terms of the following key criteria:

Their being at various stages along their economic development trajectory; and

Location characteristics, relative to urban and rural populations, among other attributes.

These communities were the focus of site visits and telephone interviews intended to solicit information at a more detailed level than is otherwise publicly available.

Whereas the above communities were recruited for a more in-depth and detailed examination, as the study progressed, all Atlantic communities were ultimately included. All four Atlantic Provinces, as well as Quebec, are represented as the traditional lands of all the applicable Indigenous communities. The full list of communities is provided in **Appendix B**. Publicly available financial statements were collected from these communities, digitized, and analysed for the purpose of the economic impact assessment described in section 4.

Other stakeholder outreach included:

- Indigenous business owners;
- Indigenous organizations that support Indigenous communities and individuals on and off reserve; and
- Band staff within these communities.

Appendix C provides an overview of the tools developed as part of this particular research effort.

Information on the survey developed and deployed as part of the study is included in Section 3.3 below.

3.2 Community Interviews and Other Outreach Observations and Comments

This section provides a summary of the key findings of the in-depth interviews with the thirteen study communities located in the provinces of Nova Scotia, New Brunswick and Prince Edward Island. Feedback was obtained from all but two communities in New Brunswick, information for which was obtained through secondary research.

The interview information augmented and dovetailed with feedback obtained from the community stakeholder meetings and from the survey results.

Community outreach was facilitated by obtaining written consent from the communities' Chiefs and by the Chiefs identifying the specific individual(s) with whom the GATN research team could engage and obtain detailed economic development and financial information. This consent procedure was in addition to the approved letter sent to all communities at the study's onset. This initial communique solicited financial information at a higher level of granularity than what was typically available through secondary research. During the study, community interviews were conducted with more than 50 individuals and, generally required outreach to four to six people per community. In excess of 200 teleconferences and e-mail exchanges yielded a detailed record of business and economic development activity.

It is evident from the interviews conducted and information collected that the wheel of economic development activity in Indigenous communities and among business owners is gathering considerable momentum. Beyond the numbers, an energy and optimism was manifestly evident.

There are many examples of communities leading the way in the region when it comes to economic development. For example, communities such as, Madawaska, Membertou and Millbrook have helped set the stage for other communities in the Atlantic region that are now beginning to set their sights on more robust, sophisticated and ambitious economic development activity.

Instead of reinventing the wheel, a number of communities that are in the early stages of economic development look to other Indigenous communities that are economically successful. Membertou, Millbrook and Madawaska, communities that are consistently lauded as economic 'success stories', provide inspiration, serve as business models and, in some instances, offer other communities specific guidance and advice such as approaches taken and lessons learned. Communities are beginning to recognize that there are virtually unlimited possibilities for them to pursue in respect to successful economic development activities. And there is also an awareness that 'one size does not fit all' and that successful approaches and activities must be adapted to the presenting circumstances of a particular area – the local economy, the demography, the opportunity environment, and the presence of viable partners among other factors.

Buzz words such as *economic development*, *revenue generation*, *reinvestment in community* and *capacity building* were prevalent throughout the interviews and these meetings. Stakeholders were uniformly generous of their time and open in terms of offering their opinions and proposing solutions; a factor for which the consultant team is very grateful.

Communities interviewed also echo these sentiments and recognize that, reaching the ultimate goal of self-government will depend on successful economic development and enhanced own-source revenues: the pathway for transforming this laudable goal into reality.

Taken in aggregate, the diverse meeting participants, survey respondents and interview participants identified the following as critical success factors in Indigenous economic development:

- **Strong Leadership** – Although strong and stable leadership is a key theme mined from the communities interviewed, when it comes to success in economic development ventures, effective leadership also acknowledges **importance of reinvesting** business-generated revenues back into the community.

Re-investing is not simply a matter of sound financial planning and seeing monetary assets grow. Reinvesting was described as capacity building, employment and training opportunities for community members, infrastructure improvements and other developments. This reinvestment imperative is seen as an effective way to instill pride in community members and as an avenue to provide youth with hope for their future.

- **Strategic Partnerships** – Identifying and developing strategic partnerships that are mutually beneficial to all parties is also viewed as an effective approach to economic development. Partnership development, joint ventures and building industry relations that result in *Impact Benefit Agreements (IBAs)*, *Memoranda of Understanding (MOUs)* or other instruments are crucial to successful community economic development.

Many of the communities interviewed are already active in local business associations, are participating in business networking opportunities or are in the process of joining these types of organizations as a way to help identify and become familiar with potential partners and investors.

Other communities are also embracing the idea of partnership development to help realize their economic development goals. Mutually beneficial partnerships are proving to be a win-win situation for all involved. A significant number of communities have joined (or are in the process of joining) local business associations, are participating in business networking opportunities and are considering potential partnerships when creating economic development plans.

Partnership opportunities were identified as providing capacity building, as well as employment opportunities for community members. They are also seen as a viable approach in tapping into new and specific areas of economic development. Stakeholders stressed the fact that there is an onus upon communities to perform their own due diligence to ensure that they are laser-focused on what type of partnership will be most advantageous.

- **Bringing in Outside Expertise When Required** – Communities have recognized the importance of sourcing non-Indigenous people and businesses to assist in addressing capacity gaps that impede the realization of Indigenous economic development goals. Adopting such a strategy reportedly has proved to be highly advantageous to many of the communities participating in the study.

Bringing in outside resources may include mentoring and / or the contracting of outside expertise such as semi-retired senior level business people or sector-specific consultants.

Communities that are already active in economic development ventures and those just beginning the journey realize that bringing outside resources into the communities stands as an effective way to learn and to build capacity. In turn, this approach provides opportunities for the outside entities to access new sources of revenues while also helping Indigenous communities to improve their self-sufficiency.

- **Primacy of Economic Development Plans** – Developing an economic development plan that takes into consideration the strengths, uniqueness and weaknesses of individual communities was flagged by study participants as being integral to moving forward.

All of the communities interviewed, and certainly those that are analogues that have achieved considerable success, recognize the importance of effective planning and the

foundational importance of having an economic development plan in place and keeping it evergreen through periodic updating.

Importance of Community Input and Cultural Considerations – Community input into a Band’s vision for the future is seen to be a critical success factor in an effective economic development plan. Addressing community concerns and obtaining member feedback was a common theme voiced by study participants and is regarded as being, in the words of an enthusiastic participant, ‘a given’. Some informants, and indeed the literature review, attests to the importance of this principle and the possibility of failure when it is ignored or not meaningfully accommodated.

Most of the interview informants and other study participants recognize the importance of any economic development ventures including a strong cultural component that reflects the fact that Indigenous communities offer unique differences from non-Indigenous communities. Bands should not duplicate or emulate economic development models that do not take into consideration the unique circumstances that Indigenous communities face, and the unique cultures and history that have shaped their communities.

- **Economic Development = Opportunity and Hope** – Amongst key informants, there was a reassuring sense of purpose and hope for the future. Many reflected on the fact that their economic development ventures have had a positive impact with respect to raising levels of hope among community members. Ventures can heighten interest among youth, inspiring them to complete their education and training and to take an active role in securing the future well-being of themselves and their communities.

The following additional observations and comments were compiled from the community meetings:

- Meeting participants underscored the importance of the research being undertaken through this study.
- Participants recognize the complexity of the research and believe that its value proposition is two-fold: its potential to dispel myths and to instill community pride.
- Meetings resulted in some participants reflecting on the policy issues that create barriers to greater economic success for both communities and Indigenous entrepreneurs. Some feel that the barriers need to be explored in greater detail and addressed more assertively.
- Many were intrigued by the research presenting a baseline that can be updated as a tool to gauge future growth and progress.
- Meeting participants shared their hopes for the research including:
 - Raising awareness of the contributions of Atlantic Indigenous people to the Atlantic Indigenous Economy.

- The Indian Taxation Advisory Board may help Indigenous communities to develop an internal economy.
 - Need for more education and training for young entrepreneurs.
 - Desirability of a full compendium of businesses existing in the entire Mi'kmaq Territory. In this regard, strong support exists for an Indigenous Chamber of Commerce.
 - Recognition of the important contributions of Indigenous women to the economic growth of both reserves and provinces is needed.
 - Need for more resources to support growth.
- Throughout the meetings there was a universal recognition of the important role Indigenous people can play in addressing labour force constraints arising from demographic challenges.
 - Key informants generally pointed out that more recognition is needed in relation to the overall success and contributions of Indigenous entrepreneurs and businesses.

3.3 Business Survey Findings

In an effort to reach as many key informants as possible, an online survey was developed and deployed. It was accompanied by a vigorous communications strategy that included the efforts of Indigenous stakeholders and social media outreach to promote awareness of the on-line survey and to encourage participation in the research. Best estimates derived from canvassing several sources suggest that approximately 300 Indigenous-owned entrepreneurial businesses operate in Atlantic Canada. Roughly half of these businesses linked through to the survey, with 86 completing a substantive portion of the survey. This suggests strong engagement on the issue of economic development among Indigenous business operators and provides a solid foundation of responses on which to conduct further analysis.

The value of this research and the opportunity to use the findings to leverage further potential economic growth was echoed through the comments of many of the respondents. There was anticipation that the study's practical research findings and insights could be used to address longstanding barriers to growth. Oft-cited examples include increased business resources and improved access to financing and capital. Education and training were viewed as additional factors that would support growth and nurture an entrepreneurial mindset. A recurring theme was the opportunity to use Band-level procurement to leverage business growth; hands-down, this issue attracted the most comments. Many of the respondents reflected on the need to develop Indigenous procurement policies among Indigenous organizations and Indigenous communities so that these policies become capacity building tools and growth levers for Indigenous entrepreneurs and businesses.

This stands as an acknowledgement of the pride and quality inherent in Indigenous businesses. It was suggested that an Indigenous First program in Band-level procurement would serve to create a realistic pathway for Indigenous entrepreneurs to grow their businesses. Initiatives in this area will require the collaboration of Band Councils and potentially, other collaborators.

Finally, there is an expectation that the research project will lead to increased awareness and recognition of the contribution of Atlantic Indigenous people to the regional economy. The study will also grow community recognition and pride in the accomplishments of Indigenous business owners.

The wide variety of business activity represented among the participating Indigenous enterprises is noteworthy. The geographic diversity and wide range of commercial interests and activities is a clear signal that communities and community members are not limited in their entrepreneurial activities, but rather, are highly responsive to local economic circumstances (whether on or off reserve or both).

Diversity is also apparent in the date of business formation - ranging from 1970 to 2016 – a span of nearly 50 years. The majority of businesses (77%) were established after 2000. This may well reflect the more recent drive among Indigenous communities and individuals to pursue commercial enterprises. The activity also coincides with the establishment of local, provincial, and regional supporting institutions and programming designed to target Indigenous businesses as part of a broader thrust in economic development. Nearly one in ten (7%) businesses was established in the 1970s, whereas 22% were formed in the 1980s and 1990s. Given the challenges all small businesses face, coupled with overall attrition rates, the longevity of these businesses is impressive.

The business level results hint toward the impact of Indigenous businesses on the Atlantic Indigenous Economy. The operating budgets of the participating businesses ranged from minimal to over \$10 million. The average annual operating expenditure for participating Indigenous businesses was \$350,000. Even after adjusting for the relatively large businesses, the average annual expenditures were in the order of \$130,000 per year. Employment also reflects the impact of these business operations. Indigenous businesses are an important source of employment with an average of 5.39 workers.

The research findings punctuate the positive economic interactions taking place between Indigenous communities and their surrounding communities. For example, Indigenous businesses were an important source of employment for both Indigenous people and non-Indigenous people. Just over two-thirds (68%) of the employees of the Indigenous-owned businesses were Indigenous, with the remaining 32% being non-Indigenous. This is further illustrated by the spending of Indigenous enterprises on outside contractor services. Half (50%) of businesses reported that their contractors were normally sourced off reserve but from within the local area. A high share of the overall spending remains within the local economy.

The significant annual capital investment in Indigenous-owned businesses is also illustrative of their impact on the local economy. Capital expenditures for all reporting businesses totaled \$1.9 million, with an average expenditure of \$78,000. Many of the capital expenditures were for significant purchases – with some running as high as \$100,000. Heavy equipment, special purpose vehicles, cars and trucks were some of the more common capital purchases.

The intent of the business survey was to collect information from on reserve and off reserve businesses to secure the following information: business profile; operating expenses (inputs); and

supplier sources. The following provides a summary of key findings, many of which align closely with findings arising from outreach to other stakeholders throughout the study:¹⁰

- Nova Scotia represents the largest contingency – accounting for the locale of business operations for 58% of respondents. New Brunswick followed, with nearly a quarter (23%) of businesses identifying that province as its base. Prince Edward Island (13%), Newfoundland and Labrador (5%) and Quebec (1%) were the home bases for a total of 19% of respondents.
- Four in five (79%) businesses operated from a single location. The remaining 21% of businesses operated from multiple locations. There was a diversity of business distribution models. Nine of the businesses operated from more than one community in Atlantic Canada. Other businesses operated regionally, nationally and globally (online). The main physical location for 72% of businesses was on reserve, compared to 28% off reserve.
- The most common type of business was sole proprietorship, with 46% of businesses reporting this structure. This is consistent with many of the operators with whom the study team met. It also aligns with the study finding that highlights the fact that many who could be categorized as entrepreneurs do not necessarily see themselves or categorize their operations in that role. Rather, these individuals define themselves by what they do – crafters or jewelry makers – but not as business persons. The second most frequent type of business was home based (19%), followed by corporation (12%), partnerships (10%), Band owned enterprises (5%) and various other types of businesses (7%).
- Operators were asked if their businesses were involved in production and if they sold goods and/or services. The largest share (27%) of operations surveyed sold services exclusively. Following very slightly behind at 26% were operations that were involved in the provision of both goods and services.
- Six in ten (60%) businesses that participated in the survey were located in Nova Scotia. New Brunswick followed at 32%, with Prince Edward Island at 22%. Areas outside of Atlantic Canada (16%), in Newfoundland (13%) and in Labrador (7%) accounted for the remainder. The results reflect that many businesses operate in multiple provinces and regions. As might be expected, the location of the business operations is generally aligned with the provincial and regional Indigenous communities and their respective populations.
- The businesses spanned a wide range of sectors. The 87 profiled businesses operated in 11 sectors, with many active in multiple sectors. The most represented sector was retail sales (35%), followed by business services (24%) and arts and crafts (23%). Just over one in ten (11%) businesses was construction-related. Six sectors each accounted for less than 10%

¹⁰ These are presented in the order in which the survey generated responses. There is no rank or importance associated with the order in which these results are presented.

of all the businesses – including tourism (9%), other services (9%), fish harvesting (8%), communication services (5%), food services (3%) and fish processing (2%). Business outside these sectors (17%) included information technology, renewable energy, transportation, fine art, hunting, rentals and distribution.

- The operational budgets of the participating businesses varied substantially – ranging from minimal to over \$10 million. The average annual operating expenditure for participating Indigenous businesses was \$350,000. Adjusting for those respondents whose businesses are relatively large, the average annual expenditures were in the order of \$130,000 per year.
- Indigenous-owned businesses are an important source of employment. On average, employment (of all types) was 5.39 workers for businesses that responded to this question. The largest category of employees was part-time/ full year at 1.87 employees per business. Just over two-thirds (68%) of the employees of the Indigenous-owned businesses were Indigenous; the remaining 32% were non-Indigenous.
- Indigenous-owned businesses employed a range of full time and part time employees who worked a similar number of hours. The average number of weeks worked per year was 28 for full time employees, compared to 27 for part time employees. The average rate of pay, excluding benefits for full time employees, was \$15.50 per worker, compared to \$9.89 for part time employees. The gap between the part time hourly wage and the legislated rate may reflect the financial challenges of operating a small business – particularly, among young ventures where informal compensation practices reflect the challenge faced by proprietors to pay themselves the going rate. The benefit rate averaged 11% among all employees.
- Survey respondents were asked about the location of outside contractor services (such as accountants, lawyers and consultants). Half (50%) of businesses reported that their contractors were normally sourced off reserve but from within the local area. The second most common location for sourcing contractors was outside the local area but within the province. Contractors were normally located on reserve for 12% of businesses. In 5% of cases, contractors were located outside of the province, but within Atlantic Canada. One business (2%) reported that its contractors were generally located outside of Canada. One in ten (10%) of businesses engaged contractors that are not specific to any one region. The above is an important contextual result and further punctuates the positive economic interactions taking place between Indigenous communities and their surrounding communities, wherein a high share of the overall spending remains within the local economy.
- The annual capital investment for business was significant. Capital expenditures for all businesses totaled \$1.9 million, with an average expenditure of \$78,000. Many of the capital expenditures were for significant purchases – with some running as high as \$100,000. Heavy equipment, special purpose vehicles, cars and trucks were some of the more common capital purchases.

- Survey participants offered insights and comments on the nature of the Atlantic Indigenous Economy, as well as opportunities to support further growth.
- The opportunity to use procurement to leverage business growth attracted the most comments from survey participants. Many of the respondents reflected on the need to develop Indigenous procurement policies among Indigenous-owned organizations and Indigenous communities. Comments underscored the opportunity to support economic growth and the capacity of individual businesses leveraged through supportive procurement initiatives. This stands as an acknowledgement of the pride and quality inherent in Indigenous-owned businesses. An Indigenous First program would tap into this sentiment. Initiatives in this area will require the collaboration of Band Council, and potentially, others.
- Business education and training programs are needed to support Indigenous businesses to grow their markets, develop business and to move to the next level of growth. Programing must reflect and support non-traditional businesses.
- Accreditation, certifications and promotion are needed for Indigenous businesses. These mechanisms (and other efforts) will increase awareness that Indigenous businesses are qualified, competent and open for business. Training, accreditation and raising public awareness will provide a foundation for Indigenous-owned business growth and success.
- Finally, comments underscored the primacy of the study as an opportunity to demonstrate and promote the important economic contribution that Indigenous communities make to the broader Atlantic regional economy. It was noted that, as conducted by the fastest growing demographic in Canada, the Indigenous economy is a developing market that must be served now and into the future. It is critical to recognize the economic power Indigenous people have in local rural communities – both on and off reserve.

3.4 Overview of Economic Development Activities and Initiatives

The economic activities being pursued by the targeted communities are as diverse as the communities in which they are conducted. This reflects the commitment of community members to draw on their own particular strengths, local resources and the interests and innovation quotient of community entrepreneurs.

The breadth of the multifaceted activity taking place within the communities speaks compellingly to the imperative to dispel the myth that contemporary Indigenous economic activity is largely confined to gas bars, tobacco, gaming and convenience stores.

Businesses are big, small, new, long-standing, innovative, mainstream and cutting edge. Sectors vary from conventional resource-based industries, such as fisheries and forestry, to property management and land acquisitions, gaming, building supply businesses, daycares, security services, retail and hospitality. Other sectors include air charter services, renewable energy, landscaping and tree services, IT, housing, interior decor, geomatics and music.

A detailed list of sectors and businesses is outlined in **Appendix D**.

The criticality of good governance and solid management structures was cited as being an important aspect of both day- to-day business operations and in relation to attracting business partnerships as discussed in Section 3.2 above. One community became the first indigenous government in the world to achieve ISO 9001 certification. Other communities are in the process of acquiring the First Nations Financial Management Certification¹¹ as a way of ensuring that operations run as effectively and efficiently as possible, and also to demonstrate explicitly to others (including potential investors) that 'the house is in order' and the community is open for business.

Elsewhere, commercial and business development initiatives within communities are providing employment opportunities for community members and non-Indigenous people as well. One informant indicated that there is a job for every community member if he or she chooses to take advantage of the opportunities. Youth within this particular community have exceptionally good part-time and summer employment opportunities. This, in turn, helps young people to prepare for their future long-term careers.

Non-Indigenous communities are now beginning to take notice of the Indigenous communities in their area as a potential source of employment. Some communities participating in the study are already among the top employers in their respective regions.

Noticeably, the types of economic development being pursued vary. The level and types of economic development opportunities depend on the location of the communities. The strategic location of some of the communities considered renders commercial land development easier and more attractive to both investors and businesses looking to set up operations in the region. Notwithstanding, in some cases more rural communities are left to think 'more outside the box' when it comes to identifying economic development opportunities that will not be hindered by location. The community leaders in such locales have not let location stand in the way of successful business development. Wisely, many communities are in the process of undertaking preliminary feasibility studies to assist them in identifying viable opportunities that take into consideration location, unique features and other community-specific offerings.

Land acquisition and management is also being pursued as a form of economic generation. Communities are pursuing both land acquisitions/assembly (individually and collectively) and, in some cases, the negotiation of land claims. These efforts are focused on helping communities realize their economic development goals, create the opportunity for greater self-sufficiency and as a means of breaking down one of longest standing barriers facing the Indigenous population, namely, access to capital.

In many cases, acquisitions consist of acquiring land for the purpose of commercial development; commercial buildings and private dwellings are acquired to lease. The majority of tenants for the commercial properties and housing properties are non-Indigenous. One community in particular

¹¹ <http://www.fnfmb.com/services/certification/financial-management-systems-certification/>

has recently acquired 850 acres of land, not only adjacent to the community, but also within the region and off reserve.

It is also important to note that some communities are using land management strategies that serve to offset some of the challenges associated with the *Indian Act*. Some communities are choosing to keep acquired lands in Fee Simple status as a means to leverage these assets for further economic development purposes, including financing new developments through the ability to pledge these assets as security. These communities are following the same regulations that govern other off reserve lands and the Bands are paying property taxes. One community in particular noted that 50% of the off reserve lands purchased was acquired by paying fair market value.

Clearly, innovation, creativity, ongoing dedication and a willingness to take some risks are reaping benefits for a number of communities participating in the study.

3.5 Anticipated Impacts of Economic Development

Informants identified present and potential benefits accruing to their communities as a result of economic development ventures:

- Generation of revenues that will be reinvested back into community will lead to increased own-source revenue and improved self-sufficiency.
- Increased employment opportunities for community members and non-Indigenous people in their region.
- Capacity building opportunities for the community and its members.
- Increased hope and pride for community members.
- Building of mutually beneficial relationships with non-native businesses and local non-native communities.
- Changing the public perception of Indigenous people and communities.
- Quality jobs and careers that pay well.
- Increased interest on the part of youth in trades/universities.
- Successful community members becoming role models for the next generation and potential mentors in an Indigenous mentor network.
- Employment opportunities will make it possible for community members to stay and work in the community.
- Offering of improved and additional programming and services for community members.
- Commercial development is creating leasing opportunities for non-Indigenous businesses that are expressing keen interest in bringing business to community commercial development sites.
- Training and capacity building opportunities for community members being written into tenders.

4 Estimating Direct Spending

The direct impacts within the Atlantic Indigenous Economy are based on an assessment of spending by the:

- Indigenous business community.
- Spending by organizations that support Indigenous communities.
- Household spending, and
- Community-level spending by the bands on goods and services related to their activities.

The estimates are described below.

4.1 Indigenous Business Community Spending

The business survey, discussed above, found that the average annual operating expenditure for participating Indigenous businesses was \$350,000. Adjusting for those respondents whose businesses are relatively large, the average annual expenditures were in the order of \$130,000 per year. The survey also helped identify the goods and services that were used by these businesses, where these goods and services were purchased, and where they were manufactured. With some further adjustment for large and small operations, we used an average annual expenditure per Indigenous Business of \$220,000 (removing those spending more than \$2 million and those spending less than \$15,000).

From an employment perspective, Indigenous businesses are an important source of employment. On average, employment (of all types) was 5.39 workers for businesses that responded to this question. The largest category of employees was part-time/ full year at 1.87 employees per business. Just over two-thirds (68%) of the employees of the Indigenous-owned businesses were Indigenous, with the remaining 32% being non-Indigenous.

As there is no comprehensive inventory or registry of Indigenous-owned enterprises in Atlantic Canada, the research team had to estimate the number. To do this, a number of sources were consulted, including online directories maintained by Ulnooweg Development Group, Industry Canada, and other sites. In addition, the team consulted the 10th edition of the *Indigenous Business and Communities Directory* (published by Indiana Marketing). Ultimately, the team settled on an estimate of 300 businesses based on consultation with community members and informants within APC.

Table 1 provides the resulting spending estimate.

Table 1: Estimated Indigenous Business Spending in Atlantic Canada, 2015

TOTAL	On Reserve (\$1,000)	Local Area (\$1,000)	In Province (\$1,000)	Outside of Province (\$1,000)	Total (\$1,000)
Financing	\$1,411	\$8,549	\$1,325	\$404	\$11,689
Heat	\$238	\$1,102	\$18	\$0	\$1,357
Lights	\$118	\$428	\$174	\$0	\$719
Other Fuel And Energy	\$1,885	\$1,083	\$129	\$21	\$3,118
Marketing And Advertising	\$88	\$1,290	\$94	\$133	\$1,605
Professional Services	\$246	\$553	\$168	\$123	\$1,090
Rent	\$495	\$601	\$218	\$0	\$1,313
Repairs And Maintenance	\$141	\$1,862	\$35	\$18	\$2,056
Transportation	\$396	\$1,280	\$208	\$0	\$1,884
Labour	\$5,255	\$13,698	\$124	\$0	\$19,076
Capital and Equipment	\$5,398	\$1,456	\$798	\$2,519	\$10,172
Outside Contractors	\$431	\$1,290	\$1,658	\$88	\$3,467
Other Expenses	\$60	\$886	\$7,484	\$63	\$8,493
Total	\$16,162	\$34,076	\$12,432	\$3,369	\$66,040
Share of Spending	24%	52%	19%	5%	100%

As illustrated above, we estimate that the approximately 300 Indigenous businesses spend as much as \$66 million annually on a variety of goods and services used as inputs to produce the products and services they offer for sale.

4.2 Spending By Organizations That Support Indigenous Communities

In each province, there are a number of organizations that work in support of Indigenous communities and Indigenous people who live both on and off reserve. Mandates include economic development, as well as social and personal support services. Although GATN searched for a directory that may provide a consolidated list of these organizations, we ultimately used a web-based method to search within each province to compile a list of organizations that support some dimension of the Indigenous community within the Atlantic region. From this exercise, we identified at least 35 organizations, 10 in New Brunswick, 6 in Newfoundland and Labrador, 14 in Nova Scotia and 5 in PEI.

Organizations in this category include groups like the Saint John River Valley Tribal Council, Northshore Micmac District Council, New Brunswick & Maritime Indigenous People's Council, Joint Economic Development Initiative (JEDI), Mi'kmaq Confederacy of Prince Edward Island (MCPEI), Native Council of PEI, Union of New Brunswick Indians, Ulnooweg Development Group, Nova Scotia Native Council, Active Partnership Strategy, Friendship Centre, among others.

Many of the organizations were approached and, in addition to being asked to participate in the research, were asked for their financial statements to contribute to our understanding of this component of the Atlantic Indigenous Economy.

In total, we obtained financial statements from 11 organizations and we used them to determine an average annual operational spending by consolidating financial statements into similar expenditure categories and then calculating average expenditures. These averages expenditures were then attributed to all 35 organizations as summarized in the table below.

Table 2: Estimated Indigenous Organizational Spending, 2015

Category	Share	NB	NL	NS	PE
Advertising and promotional materials	1%	\$160,984	\$96,591	\$225,378	\$80,492
Catering	2%	\$693,648	\$416,189	\$971,107	\$346,824
Communications	1%	\$263,354	\$158,013	\$368,696	\$131,677
Contracts	39%	\$11,477,264	\$6,886,358	\$16,068,169	\$5,738,632
Direct project costs	0%	\$106,882	\$64,129	\$149,635	\$53,441
Dues and fees	0%	\$97,492	\$58,495	\$136,489	\$48,746
Equipment and room rentals	1%	\$369,238	\$221,543	\$516,933	\$184,619
Equipment leases and interest	0%	\$27,597	\$16,558	\$38,635	\$13,798
Insurance	0%	\$56,890	\$34,134	\$79,646	\$28,445
Interest and bank charges	0%	\$25,456	\$15,274	\$35,639	\$12,728
Interest on long term debt	1%	\$310,822	\$186,493	\$435,151	\$155,411
Office supplies and postage	1%	\$386,390	\$231,834	\$540,947	\$193,195
Professional fees	0%	\$138,478	\$83,087	\$193,869	\$69,239
Rent and facilities	2%	\$446,147	\$267,688	\$624,606	\$223,074
Salaries and benefits	33%	\$9,549,209	\$5,729,525	\$13,368,892	\$4,774,604
Staff training and relocation	0%	\$18,521	\$11,113	\$25,930	\$9,261
Travel	17%	\$5,004,514	\$3,002,708	\$7,006,319	\$2,502,257
Total Expenses	100%	\$29,132,887	\$17,479,732	\$40,786,042	\$14,566,444
Total					\$101,965,105

Based on the sample method, the 35 organizations that support some dimension of the Atlantic Indigenous Economy spend an estimated \$102 million annually.

4.3 Household Spending

Household spending was estimated based on the information provided in a number of leakage studies completed throughout the region, monies spent on social programming and INAC data. This suggested that, on average, the per capita household spending is in the vicinity of \$19,600 per annum.

4.4 Band Spending

The information on direct spending sourced from communities was high quality and did not need to be estimated. Rather, spending information was available through a review of audited financial statements for 37 of the 38 communities included in this study.

Table 3 provides a summary of the direct spending, by category of expenditure.

Table 3: Actual Band Spending, by Categories, 2015

Category	Share	NB	NL	NS	PE	QE
Retail Operations	16%	\$52,456,623	\$15,980,365	\$40,609,621	\$3,728,457	\$6,649,003
Education	15%	\$47,395,009	\$14,438,397	\$36,691,142	\$3,368,693	\$6,007,431
Social Services	14%	\$44,753,795	\$13,633,779	\$34,646,429	\$3,180,964	\$5,672,651
Maintenance	8%	\$25,106,835	\$7,648,537	\$19,436,613	\$1,784,518	\$3,182,352
Housing	7%	\$23,694,964	\$7,218,425	\$18,343,604	\$1,684,166	\$3,003,394
AANDC	7%	\$21,293,495	\$6,486,842	\$16,484,492	\$1,513,477	\$2,699,002
Fisheries	6%	\$19,074,363	\$5,810,807	\$14,766,537	\$1,355,748	\$2,417,721
Health Canada Programs	6%	\$18,809,228	\$5,730,036	\$14,561,281	\$1,336,903	\$2,384,115
Community Health	5%	\$16,006,779	\$4,876,299	\$12,391,747	\$1,137,713	\$2,028,898
Gaming	3%	\$11,033,076	\$3,361,112	\$8,541,325	\$784,198	\$1,398,469
Economic Development	3%	\$9,543,706	\$2,907,391	\$7,388,320	\$678,338	\$1,209,688
Amortization	3%	\$8,273,303	\$2,520,376	\$6,404,829	\$588,041	\$1,048,661
Employment Development	2%	\$6,952,256	\$2,117,933	\$5,382,132	\$494,145	\$881,215
Other Programs	2%	\$6,560,428	\$1,998,566	\$5,078,796	\$466,295	\$831,550
Financial Management	1%	\$2,978,800	\$907,461	\$2,306,057	\$211,724	\$377,570
Miscellaneous	1%	\$1,905,452	\$580,476	\$1,475,118	\$135,434	\$241,521
Interest and Bank Charges	1%	\$1,669,395	\$508,564	\$1,292,373	\$118,656	\$211,600
Rent	0%	\$1,192,930	\$363,414	\$923,514	\$84,790	\$151,207
Chief and Council	0%	\$836,566	\$254,851	\$647,633	\$59,461	\$106,037
Bad Debts	0%	\$454,867	\$138,571	\$352,138	\$32,331	\$57,656
Insurance	0%	\$356,534	\$108,614	\$276,013	\$25,341	\$45,192
Forestry	0%	\$279,492	\$85,144	\$216,370	\$19,865	\$35,426
Sub-Total		\$320,627,899	\$97,675,960	\$248,216,086	\$22,789,256	\$40,640,355
Grand Total						\$729,949,556

As with the organizational spending highlighted above, the research team generated a consolidated financial picture of all communities by province, further narrowing the spending

categories into similar expenditure types. As shown, the communities included in the study spent an estimated \$730 million on a variety of goods and services during 2015.¹²

4.5 Summary

Total direct spending associated with the Atlantic Indigenous Economy totalled \$1,144 million. As outlined in Table 1, this spending originated from the following sources:

- \$66 million from Indigenous-owned businesses.
- \$246 million from household spending.
- \$730 million from Band spending; and
- \$102 million from organizational spending.

Table 4: Summary of Direct Spending (millions 2015 \$)

Region	Indigenous Business Spending (Estimate)	Household Spending (Estimate)	Band Spending (Actual)	Other Indigenous Organizational Spending (Estimate)	Subtotal Total Direct Spending
NB	\$22.84	\$85.23	\$320.63	\$29.13	\$457.83
NL	\$6.55	\$24.42	\$97.68	\$17.48	\$146.12
NS	\$28.06	\$104.71	\$248.22	\$40.79	\$421.78
PE	\$1.46	\$5.43	\$22.79	\$14.57	\$44.24
QE	\$7.13	\$26.62	\$40.64	\$0	\$74.39
Atlantic region	\$66.04	\$246.41	\$729.95	\$101.97	\$1,144.37

This direct spending occurred across the region as follows:

- \$146 million in direct spending in Newfoundland and Labrador (13%).
- \$44 million in direct spending in Prince Edward Island (4%).
- \$422 million in direct spending in Nova Scotia (37%).
- \$458 million in direct spending in New Brunswick (40%); and
- \$74 million in direct spending in Quebec (7%).

Figure 1 shows the distribution of the direct spending by region.

¹² Subsequent analysis of information not available at the time the model was run suggests that the total direct spending is in the order of \$776.6 million.

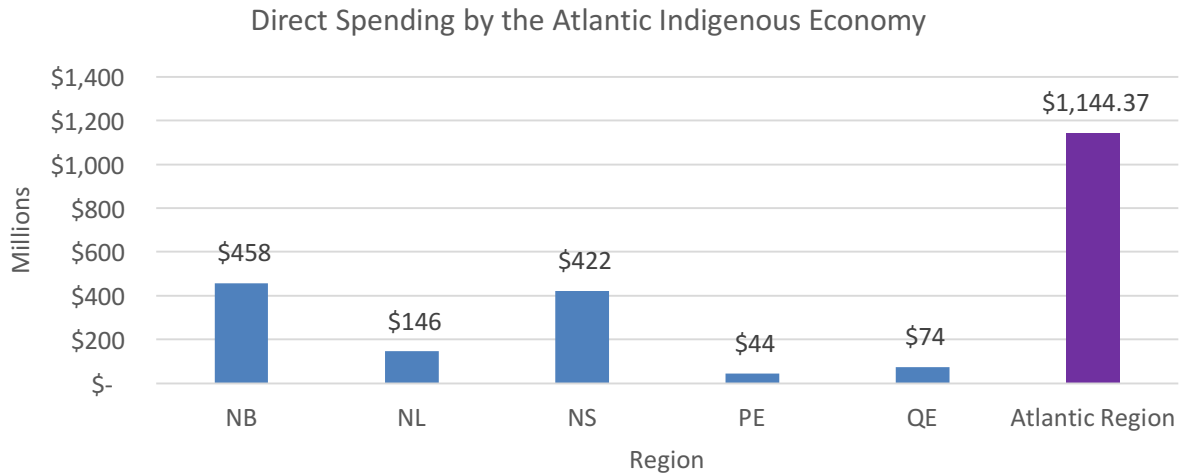


Figure 1: Regional Distribution of Direct Spending, AIE

4.6 Exclusions

It is important to highlight that the identified direct spending does not include capital expenditures on, for example, new buildings, roads, houses, or other infrastructure. Likewise, it does not include spending that is made by companies or organizations that target local economic benefits programs / employment / supplier commitments to Indigenous people. Accordingly, the direct estimate of spending is limited to operational spending (business, organizational, household, and Band-level) and therefore tends to be a conservative estimate of the total annual spending within the Atlantic Indigenous Economy.

5 Economic Impacts

In this section, we present the economic impacts based on the direct spending highlighted above. The types of impacts discussed in the report are defined below:

- **Direct Impacts** – The production, income, employment, taxes and spending on goods and services associated with the direct operation of the communities, households, Bands, Indigenous entrepreneurs and others directly involved in the Atlantic Indigenous Economy. This includes the business owner's wages and salaries, as well as expenses relating to accommodations, food and transportation;
- **Indirect Impacts** – The production, income, employment, tax, resource or environmental changes in backward linked industries. These are the impacts associated with, for example, the suppliers to the Bands, and in turn, suppliers of these suppliers. Examples of indirect effects would be the impacts associated with the transactions between an engineer assigned to an onsite oversight of the construction of a Band office building and an accommodations provider who rents accommodations to the engineer during the course of the project; and
- **Induced Impacts** – The changes in household spending caused by changes in household income. These are the impacts from employees and/or hotel employees spending their wages and salaries on goods and services. An example is a CAD operator who spends wages earned during his or her work on the design of the band office cited in the previous example.

Combined, the indirect and induced effects are sometimes called the spin-off impacts.

5.1 Total Expenditures / Gross Production

Gross Production is the final statistic generated by the I-O model. By definition, it includes 'double-counting' as the sum of all sales by industry resulting from the spending being modelled. The gross production figure is interpreted as the amount of all sales generated in each industry through the original expenditures in relation to the spending within the Atlantic Indigenous Economy. Caution needs to be exercised in use and reporting because of the double counting within the statistic.

Gross Production is the combination of the direct spending within the Atlantic Indigenous Economy and the indirect and induced industry expenditures that result. The summary of Gross Production is provided in **Table 5** as follows.

Table 5: Total Expenditures / Gross Production Impacts

Impacts (millions \$, 2015)	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$136.2	\$42.7	\$387.5	\$484.2	\$29.6	\$40.2	\$1,120
INDIRECT	\$40.5	\$14.5	\$141.8	\$165.8	\$181.4	\$299.3	\$843
INDUCED	\$104.1	\$32.3	\$306.0	\$308.6	\$191.5	\$326.3	\$1,269
TOTAL	\$280.8	\$89.5	\$835.4	\$958.6	\$402.5	\$665.8	\$3,233
<i>Share of Total</i>	9%	3%	26%	30%	12%	21%	100%
<i>Share of Atlantic</i>	11%	3%	33%	37%	16%		100%

Canada-wide, the Atlantic Indigenous Economy generated an estimated \$3,233 million in total spending in 2015. This is distributed across the region as follows:

- \$280.8 million in total spending in Newfoundland and Labrador.
- \$89.5 million in total spending in Prince Edward Island.
- \$835.4 million in total spending in Nova Scotia.
- \$958.6 million in total spending in New Brunswick; and
- \$402.5 million in total spending in Quebec.

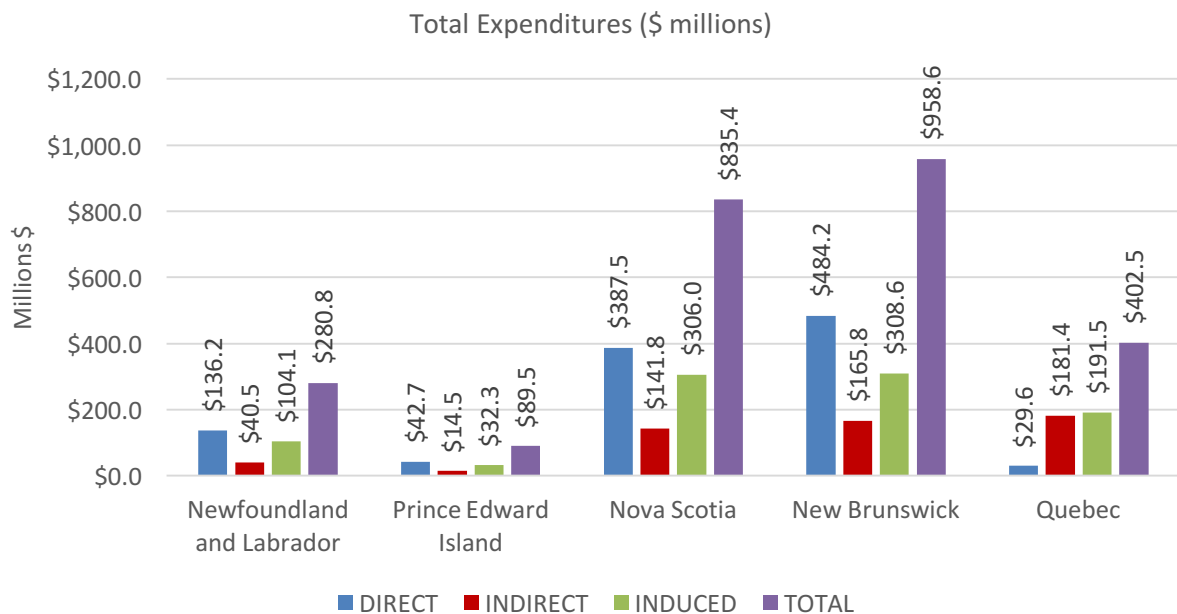


Figure 2: Regional Distribution of Total Spending / Gross Production Impacts

The total gross production impacts from the Atlantic Indigenous Economy spending in the study area are distributed as follows:

- 9% in Newfoundland and Labrador.
- 3% in Prince Edward Island.
- 26% in Nova Scotia.
- 30% in New Brunswick; and
- 12% in Quebec.

5.2 Employment

The estimated \$1,144 million in spending associated with Indigenous communities in the Atlantic Region in 2015 generated 10,352 person years of direct employment within Canada. The direct employment impacts for the provinces break down as follows: Newfoundland and Labrador (1,456), Prince Edward Island (392), Nova Scotia (3,878), New Brunswick (4,278) and Quebec (162). The employment impacts are summarized below in **Table 6**.

Table 6: Employment Impacts

Impacts (millions \$, 2015)	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	1,456	392	3,878	4,278	162	186	10,352
INDIRECT	319	139	1,141	1,405	948	1,443	5,393
INDUCED	235	95	835	761	691	1,042	3,658
TOTAL	2,010	626	5,853	6,444	1,800	2,670	19,403
<i>Share of Total</i>	10%	3%	30%	33%	9%	14%	100%
<i>Share of Atlantic</i>	12%	4%	35%	39%	11%		100%

Overall, the Atlantic Indigenous Economy generated just under 20,000 person years of direct, indirect and induced employment. This is distributed across the region as follows: Newfoundland and Labrador (2,010), Prince Edward Island (626), Nova Scotia (5,853), New Brunswick (6,444) and Quebec (1,800).

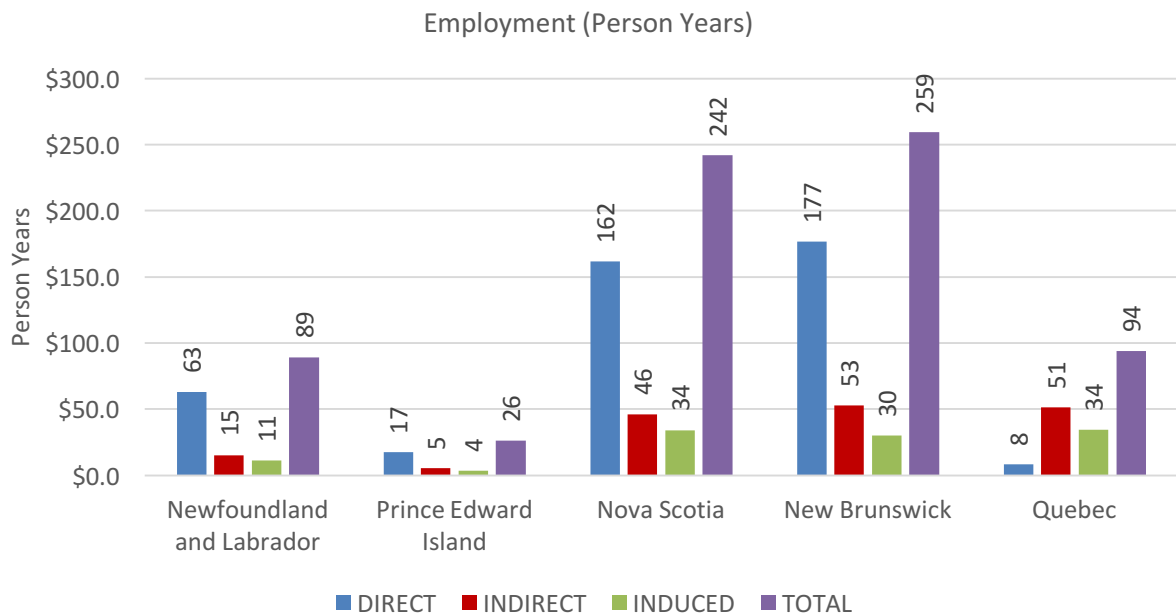


Figure 3: Regional Distribution of Employment Impacts

The employment impacts from the Atlantic Indigenous Economy spending in the study area are distributed as follows:

- 10% in Newfoundland and Labrador.
- 3% in Prince Edward Island.
- 30% in Nova Scotia.
- 33% in New Brunswick; and
- 9% in Quebec.

5.3 Household Income

The summary of the impact of the Atlantic Indigenous Economy on household income is presented below in **Table 7**.

Table 7: Household Income Impacts

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$63.2	\$17.3	\$161.7	\$176.7	\$8.4	\$10.4	\$437.6
INDIRECT	\$15.1	\$5.3	\$46.2	\$52.8	\$51.3	\$92.3	\$263.0
INDUCED	\$11.0	\$3.6	\$34.1	\$29.9	\$34.5	\$58.3	\$171.4
TOTAL	\$89.3	\$26.1	\$242.0	\$259.4	\$94.1	\$161.1	\$871.9
<i>Share of Total</i>	10%	3%	28%	30%	11%	18%	100%
<i>Share of Atlantic</i>	13%	4%	34%	36%	13%		100%

Canada-wide, the Atlantic Indigenous Economy contributed \$872 million in wages and salaries to Canadian workers through direct, induced and indirect effects. The direct, induced and indirect effects were distributed by province as follows:

- \$89.3 million in total wages and salaries in Newfoundland and Labrador.
- \$26.1 million in total wages and salaries in Prince Edward Island.
- \$242 million in total wages and salaries in Nova Scotia.
- \$259.4 million in total wages and salaries in New Brunswick; and
- \$94.1 million in total wages and salaries in Quebec.

The household income impacts from the Atlantic Indigenous Economy spending in the study area are distributed as follows:

- 10% in Newfoundland and Labrador.
- 3% in Prince Edward Island.
- 28% in Nova Scotia.
- 30% in New Brunswick; and
- 11% in Quebec.

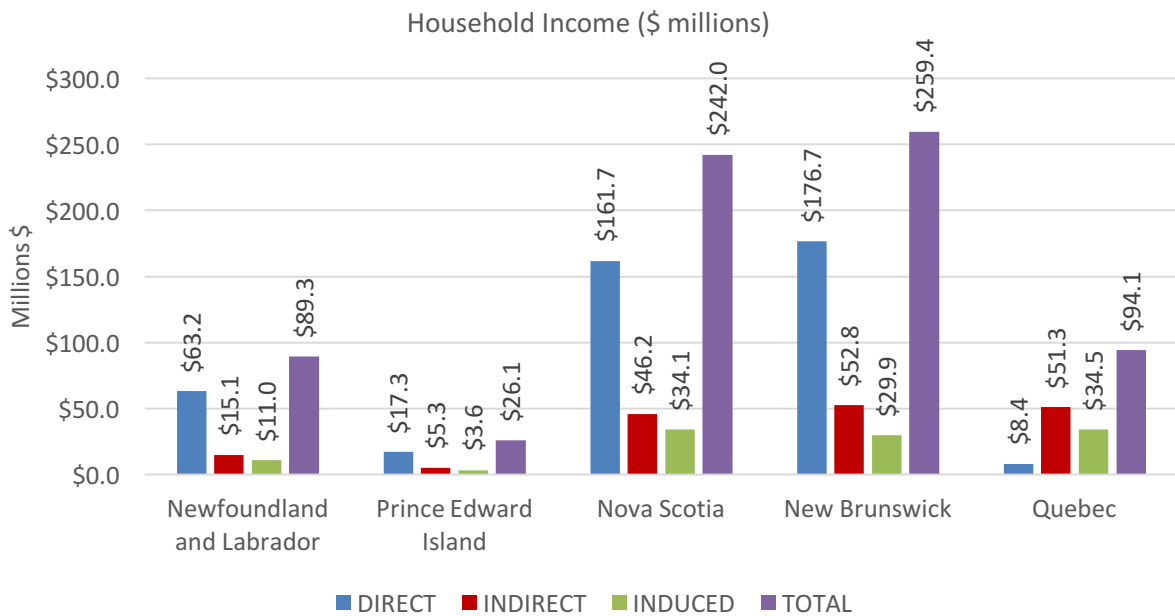


Figure 4: Regional Distribution of Household Income Impacts

5.4 Gross Domestic Product

The summary of the impact of the Atlantic Indigenous Economy on gross domestic product (GDP) at market price impacts is presented below in **Table 8**.

Table 8: Gross Domestic Product Impacts

Impacts (millions \$, 2015)	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$71.8	\$19.4	\$199.1	\$215.9	\$14.0	\$16.5	\$536.8
INDIRECT	\$20.7	\$7.6	\$69.2	\$77.1	\$84.9	\$140.7	\$400.3
INDUCED	\$27.8	\$9.3	\$88.3	\$81.5	\$67.2	\$115.2	\$389.2
TOTAL	\$120.4	\$36.3	\$356.6	\$374.5	\$166.1	\$272.4	\$1,326.3
<i>Share of Total</i>	9%	3%	27%	28%	13%	21%	100%
<i>Share of Atlantic</i>	11%	3%	34%	36%	16%		100%

Canada-wide, the Atlantic Indigenous Economy contributed \$1,326.3million in additional GDP through a combination of direct, indirect and induced GDP impacts distributed across provinces as follows:

- In Newfoundland and Labrador, GDP impacts amounted to \$120.4 million.
- In Prince Edward Island, GDP impacts amounted to \$36.3 million.
- In Nova Scotia, GDP impacts amounted to \$356.6 million.
- In New Brunswick, GDP impacts amounted to \$374.5 million; and
- In Quebec, GDP impacts amounted to \$166.1 million.

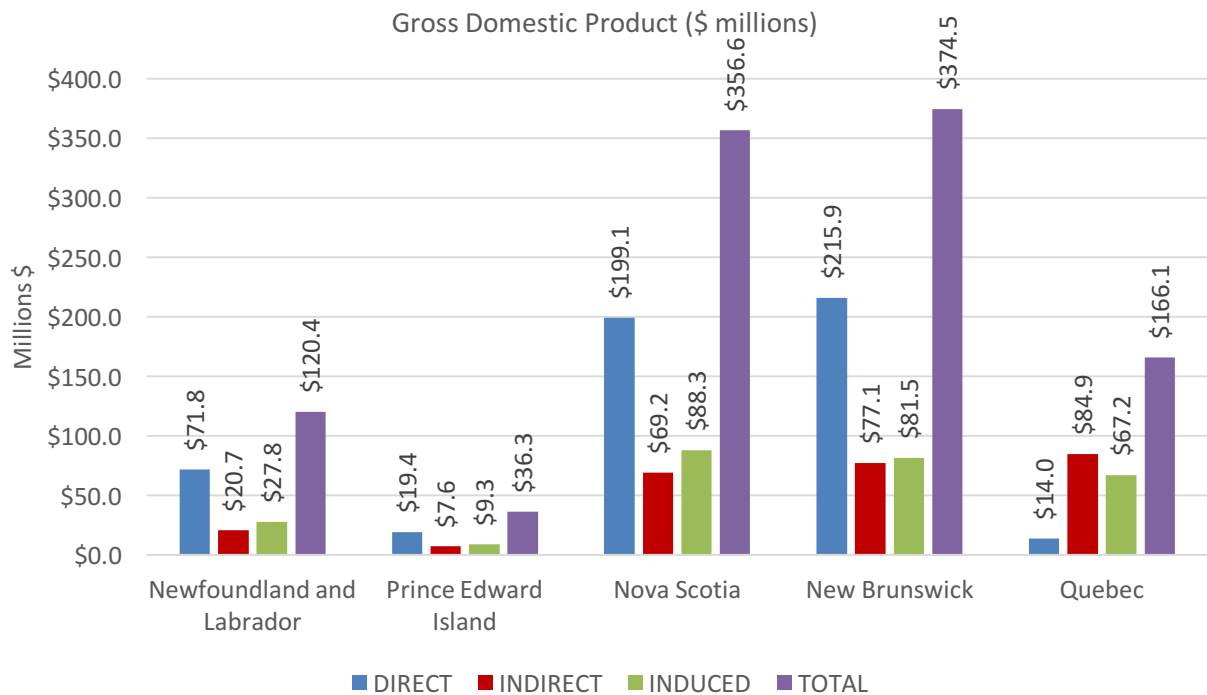


Figure 5: Regional Distribution of GDP Impacts

The GDP impacts from the Atlantic Indigenous Economy spending in the study area are distributed as follows:

- 11% in Newfoundland and Labrador.
- 3% in Prince Edward Island.
- 34% in Nova Scotia.
- 36% in New Brunswick; and
- 16% in Quebec.

5.5 Government Tax Revenues

The summary of the impact of the Atlantic Indigenous Economy on all government tax revenues is presented below in **Table 9**.

Table 9: Government Tax Revenue Impacts

Impacts (millions \$, 2015)	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$9.6	\$2.9	\$29.3	\$31.6	\$2.2	\$2.3	\$77.9
INDIRECT	\$1.7	\$0.7	\$8.7	\$7.5	\$13.8	\$19.7	\$52.2
INDUCED	\$7.8	\$2.5	\$25.3	\$24.2	\$16.7	\$25.8	\$102.3
TOTAL	\$19.2	\$6.0	\$63.3	\$63.3	\$32.6	\$47.8	\$232.3
<i>Share of Total</i>	8%	3%	27%	27%	14%	21%	100%
<i>Share of Atlantic</i>	10%	3%	34%	34%	18%		100%

Canada-wide, the Atlantic Indigenous Economy is estimated to have contributed \$232 million in federal, provincial and other tax dollars in 2015. These combined tax impacts (including direct, indirect and induced) are distributed by province as follows:

- In Newfoundland and Labrador, total tax impacts amounted to \$19.2 million.
- In Prince Edward Island, total tax impacts amounted to \$6 million.
- In Nova Scotia, total tax impacts amounted to \$63.3 million.
- In New Brunswick, total tax impacts amounted to \$63.3 million; and
- In Quebec, total tax impacts amounted to \$32.6 million.

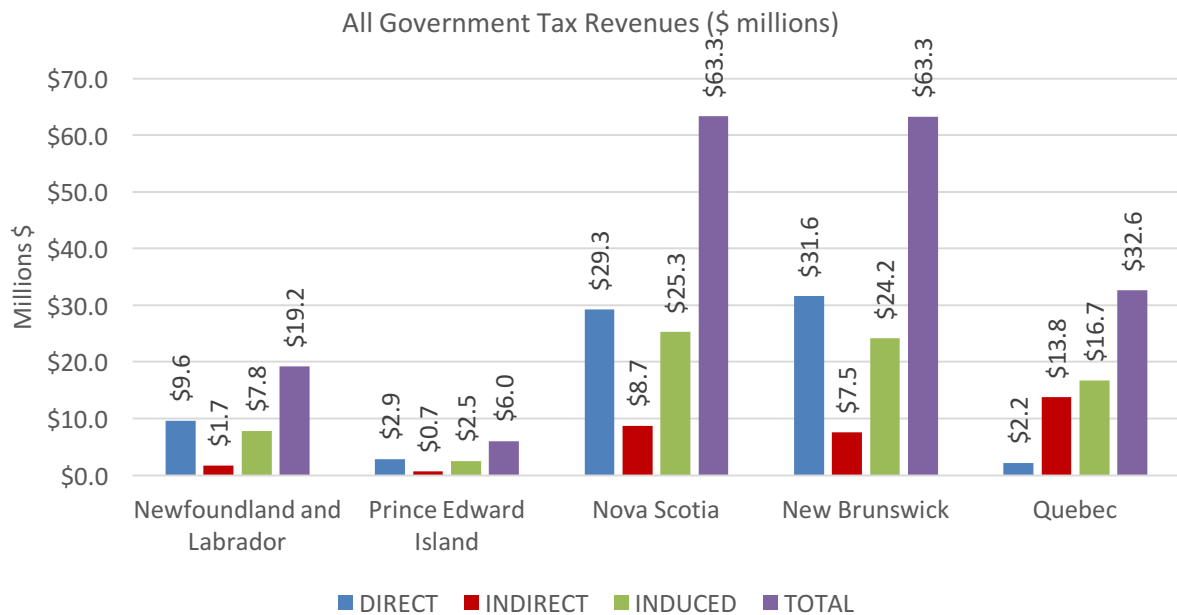


Figure 6: Regional Distribution of All Government Tax Revenue Impacts

The government (all levels) tax revenue impacts from Atlantic Indigenous Economy spending in the study area are distributed as follows:

- 8% in Newfoundland and Labrador.
- 3% in Prince Edward Island.
- 27% in Nova Scotia.
- 27% in New Brunswick; and
- 14% in Quebec.

5.6 Federal Tax Revenues

The summary of the impact of the Atlantic Indigenous Economy on federal tax revenues is presented below in **Table 10**.

Table 10: Federal Tax Revenue Impacts

Impacts (millions \$, 2015)	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$4.6	\$1.3	\$12.1	\$13.3	\$0.9	\$1.2	\$33.4
INDIRECT	\$1.0	\$0.3	\$4.0	\$3.9	\$6.1	\$10.6	\$25.9
INDUCED	\$2.7	\$0.8	\$8.4	\$7.8	\$5.8	\$10.5	\$36.0
TOTAL	\$8.3	\$2.4	\$24.4	\$25.1	\$12.9	\$22.2	\$95.4
<i>Share of Total</i>	9%	3%	26%	26%	13%	23%	100%
<i>Share of Atlantic</i>	11%	3%	33%	34%	18%		100%

Canada-wide, the Atlantic Indigenous Economy is estimated to have contributed \$232 million in federal tax revenues in 2015. These federal tax impacts (including direct, indirect and induced effects) are distributed by province as follows:

- In Newfoundland and Labrador, federal tax impacts amounted to \$8.3 million.
- In Prince Edward Island, total federal tax impacts amounted to \$2.4 million.
- In Nova Scotia, total federal tax impacts amounted to \$24.4 million.
- In New Brunswick, total federal tax impacts amounted to \$25.1 million; and
- In Quebec, total federal tax impacts amounted to \$12.9 million.

The federal tax revenue impacts from the Atlantic Indigenous Economy spending in the study area are distributed as follows:

- 9% in Newfoundland and Labrador.
- 3% in Prince Edward Island.
- 26% in Nova Scotia.
- 26% in New Brunswick; and
- 13% in Quebec.

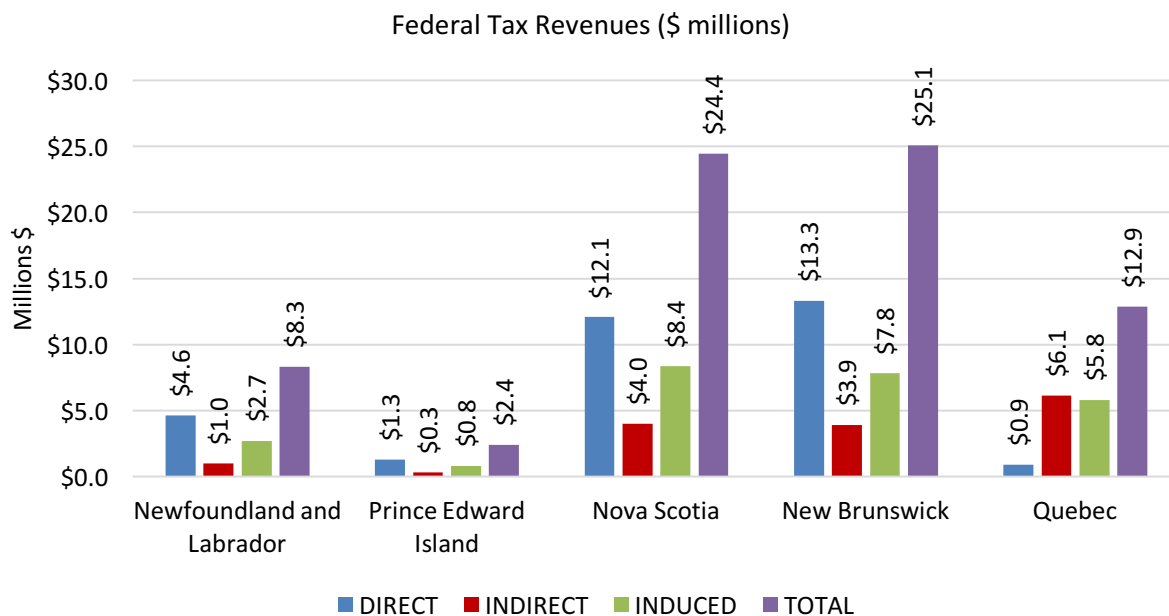


Figure 7: Regional Distribution of Federal Government Tax Revenue Impacts

5.7 Provincial Tax Revenues

The summary of the impact of the Atlantic Indigenous Economy on provincial tax revenues is presented below in **Table 11**.

Table 11: Provincial Tax Revenue Impacts

Impacts (millions \$, 2015)	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$4.6	\$1.5	\$13.9	\$15.9	\$1.1	\$0.9	\$38.0
INDIRECT	\$0.7	\$0.3	\$4.0	\$3.4	\$7.0	\$7.7	\$23.1
INDUCED	\$4.3	\$1.6	\$12.3	\$13.4	\$8.7	\$10.7	\$51.0
TOTAL	\$9.6	\$3.4	\$30.2	\$32.7	\$16.8	\$19.3	\$112.0
<i>Share of Total</i>	9%	3%	27%	29%	15%	17%	100%
<i>Share of Atlantic</i>	10%	4%	33%	35%	18%		100%

Canada-wide, the Atlantic Indigenous Economy is estimated to have contributed \$112 million in provincial tax revenues in 2015. These provincial tax impacts (including direct, indirect and induced) are distributed by province as follows:

- In Newfoundland and Labrador, provincial tax impacts amounted to \$9.6 million.
- In Prince Edward Island, total provincial tax impacts amounted to \$3.4 million.
- In Nova Scotia, total provincial tax impacts amounted to \$30.2 million.
- In New Brunswick, total provincial tax impacts amounted to \$32.7 million; and
- In Quebec, total provincial tax impacts amounted to \$16.8 million.

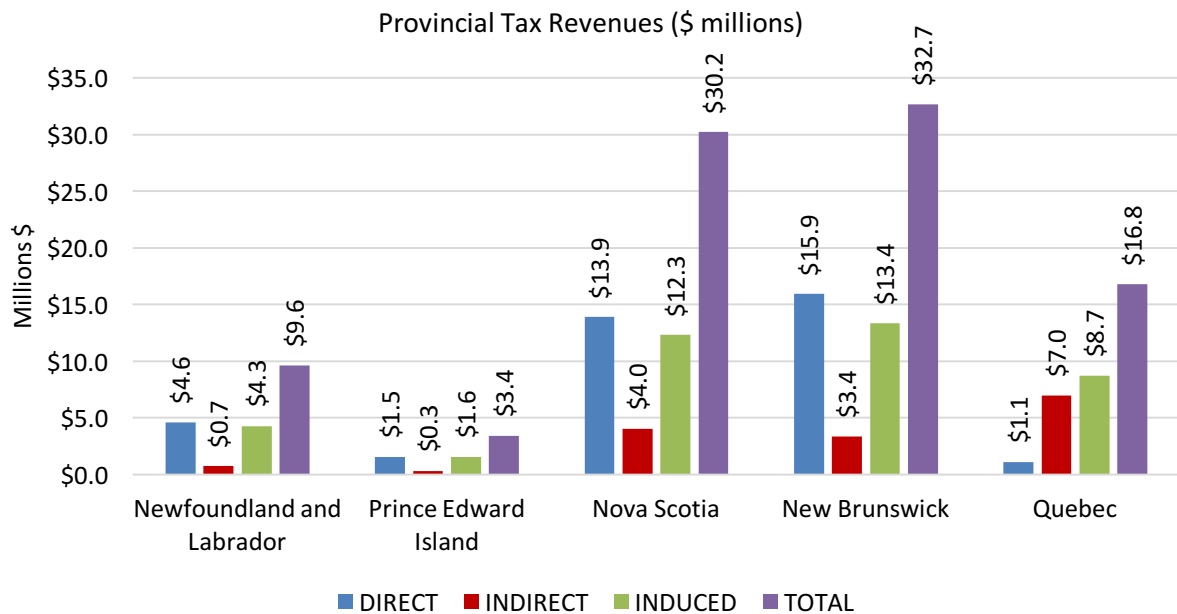


Figure 8: Regional Distribution of Provincial Government Tax Revenue Impacts

The provincial tax revenue impacts from the Atlantic Indigenous Economy spending in the study area are distributed as follows:

- 9% in Newfoundland and Labrador.
- 3% in Prince Edward Island.
- 27% in Nova Scotia.
- 29% in New Brunswick; and
- 15% in Quebec.

5.8 Other Tax Revenues

The summary of the impact of the Atlantic Indigenous Economy on other tax revenues is presented below in **Table 12**.

Table 12: Other Tax Revenue Impacts

Impacts (millions \$, 2015)	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$0.4	\$0.0	\$3.3	\$2.3	\$0.1	\$0.2	\$6.4
INDIRECT	\$0.0	\$0.0	\$0.7	\$0.3	\$0.7	\$1.5	\$3.2
INDUCED	\$0.8	\$0.1	\$4.6	\$3.0	\$2.2	\$4.6	\$15.3
TOTAL	\$1.2	\$0.2	\$8.7	\$5.6	\$3.0	\$6.3	\$24.9
<i>Share of Total</i>	5%	1%	35%	22%	12%	25%	100%
<i>Share of Atlantic</i>	7%	1%	47%	30%	16%		100%

Canada-wide, the Atlantic Indigenous Economy is estimated to have contributed \$25 million in other tax revenues in 2015. These other tax impacts (including direct, indirect and induced) are distributed by province as follows:

- In Newfoundland and Labrador, other tax impacts amounted to \$1.2 million.
- In Prince Edward Island, total other tax impacts amounted to \$.2 million.
- In Nova Scotia, total other tax impacts amounted to \$8.7 million.
- In New Brunswick, total other tax impacts amounted to \$5.6 million; and
- In Quebec, total other tax impacts amounted to \$3.0 million.

The other tax revenue impacts from the Atlantic Indigenous Economy spending in the study area are distributed as follows:

- 5% in Newfoundland and Labrador.
- 1% in Prince Edward Island.
- 35% in Nova Scotia.
- 22% in New Brunswick; and
- 12% in Quebec.

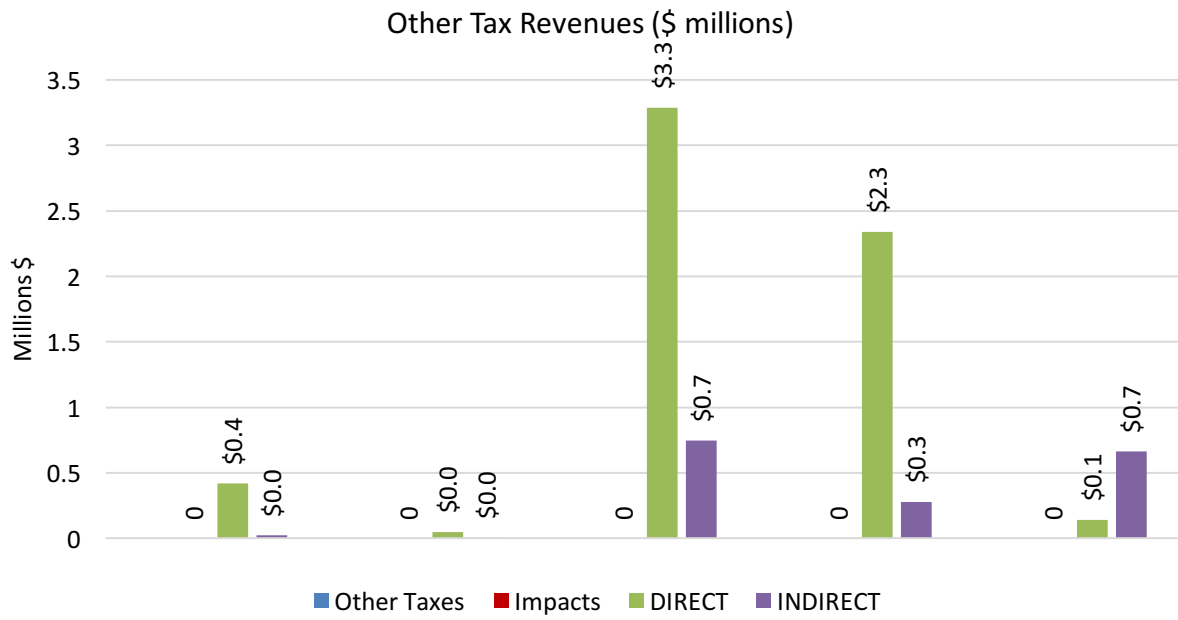


Figure 9: Regional Distribution of Other Government Tax Revenue Impacts

5.9 Impact Summary

From the standpoint of the annual operational impacts of the Atlantic Indigenous Economy, as defined in this report, we highlight the following key results.

For **Prince Edward Island**, the provincial impacts include:

- \$89.5 million in total expenditures / gross production.
- 626 FTEs (employment).
- \$26.1 million in in household income.
- \$36.3 million in GDP.
- \$6.0 million in government tax revenues:
- \$2.4 million in federal tax revenues.
- \$3.4 million in provincial tax revenues.
- \$0.2 other tax revenues.

In **Newfoundland and Labrador**, the impacts include:

- \$280.8 million in total expenditures / gross production.
- 2,010 FTEs (employment).
- \$89.3 million in in household income.
- \$120.4 million in GDP.
- 19.2 million in government tax revenues:
- 8.3 million in federal tax revenues.
- \$9.6 million in provincial tax revenues.
- \$1.2 other tax revenues.

Provincially, **Nova Scotia** contributed the following impacts to the Atlantic Indigenous Economy:

- \$835.4 million in total expenditures / gross production.
- 5,853 FTEs (employment).
- \$242.0 million in in household income.
- \$356.6 million in GDP.
- \$63.3 million in government tax revenues:
- \$24.4 million in federal tax revenues.
- \$30.2 million in provincial tax revenues.
- \$8.7 other tax revenues.

From **New Brunswick**, the provincial summary impacts include:

- \$958.6 million in total expenditures / gross production.
- 6,444 FTEs (employment).
- \$259.4 million in in household income.
- \$374.5 million in GDP.
- \$63.3 million in government tax revenues:
- \$25.1 million in federal tax revenues.
- \$32.7 million in provincial tax revenues.
- \$5.6 other tax revenues.

For portions of **Quebec** included in the region, the impacts include:

- \$402.5 million in total expenditures / gross production.
- 1,800.10 FTEs (employment).
- \$94.1 million in household income.
- \$166.1 million in GDP.
- \$32.6 million in government tax revenues:
- \$12.9 million in federal tax revenues.
- \$16.8 million in provincial tax revenues.
- \$3.0 other tax revenues.

Including all regions highlighted above, the combined impacts for **Atlantic Canada** include:

- \$2,566.7 million in total expenditures / gross production.
- 16,733 FTEs (employment).
- \$710.9 million in household income.
- \$1,053.9 million in GDP.
- \$184.5 million in government tax revenues:
- \$73.2 million in federal tax revenues.
- \$92.7 million in provincial tax revenues.
- \$18.6 other tax revenues.

Appendix E provides a number of summary tables.

6 Conclusions and Next Steps

As the first study of its kind on the magnitude and impact of the Atlantic Indigenous Economy, this study provides a baseline of the level of economic activity generated by Indigenous communities within the region. It also chronicles how those impacts flow across the communities, within the individual provinces and across the country. The importance of these communities to the regional and Canadian economies is indisputable; perhaps, more so in a region of the country that has traditionally had serious economic challenges.

With over \$1 billion in annual spending on a variety of goods and services which, for the most part, are sourced within their home province, Atlantic Indigenous communities are supporting local businesses in largely rural areas of Atlantic Canada, creating an Atlantic Canada-wide economic impact that includes:

- \$2,566.7 million in total expenditures / gross production.
- 16,733 FTEs (employment).
- \$710.9 million in household income.
- \$1,053.9 million in GDP.
- \$184.5 million in government tax revenues:
- \$73.2 million in federal tax revenues.
- \$92.7 million in provincial tax revenues.
- \$18.6 in other tax revenues.

Of the \$1.144 billion that these communities spend on consumables every year, 94% is spent in Atlantic Canada.

For every dollar spent by the Atlantic Indigenous Economy, another \$1.42 is spent elsewhere in Atlantic Canada (\$2.82 Canada-wide).

In terms of the areas impacted by the Atlantic Indigenous Economy:

- 79% of the spending and re-spending occurs within Atlantic Canada.
- 86% of the employment effect occurs in Atlantic Canada.
- 81.5% of the household income stays in Atlantic Canada.
- 79% of the contribution to GDP is from the impacts within Atlantic Canada.
- 79% of the tax revenues that are generated by this the Atlantic Indigenous Economy are generated in Atlantic Canada.

Comparatively speaking, the annual spending by the Atlantic Indigenous Economy is on par with the annualized spending of virtually any major project being discussed in Atlantic Canada in recent years. The Irving Shipbuilding is estimated at \$1.3 billion spending per year for 25 years, the Labrador-Island Link (\$2.1 billion), the Maritime Link (\$1.2 billion), Shell's 2016 -2017 approved 11-12 month drilling and exploration program (\$1 billion), among others making up the estimated \$122 billion major projects recently inventoried by the Atlantic Provinces Economic Council (APEC). All of these projects have a beginning, middle, and an end and all of these projects will involve the importation of machinery, equipment, and technical knowhow. The vast preponderance of the \$1.144 billion injected into the Atlantic region by the Atlantic Indigenous Economy is spent within Atlantic Canada (94%). Furthermore, the majority of this spending happens in rural and semi -urban areas.

Several important factors that impact the Indigenous economy emerge from this study. These were reinforced repeatedly and, often passionately, throughout the outreach and engagement process and during the regional meetings held across Atlantic Canada. These are salutary for the future and include:

- The study underscores the fundamental importance of using community/Band procurement as a tool to advantage local business, apprentices and to employ local Indigenous people. Many study participants advocated for Indigenous communities, as well as government, to introduce approaches to engaging Indigenous-owned businesses, as well as Indigenous apprentices / labour in procurement for infrastructure and other on reserve contracting opportunities. Those advocating this approach see the need for the development of a protocol broadly endorsed by Atlantic Chiefs, specifically including provisions in Band contracting and procurement to enhance opportunities for Indigenous-owned businesses (as well as Indigenous apprentices). This could include a system that assigns points for these provisions as part of the evaluation process associated with various projects:
 - Spending thresholds or a targeted percent content for Indigenous-owned businesses.
 - Capacity building and partnership arrangements for working with Indigenous-owned businesses, with specific targets in outcomes – progression to higher-level credentials, acclimation to higher-levels of project management and responsibility over the course of the contract execution, among others.
 - Targets for Indigenous apprentices and labour in these procurement opportunities, with accompanying support for mentorship, including the potential for cohort learning and training.

In addition, more strategic buying by Bands potentially means more value to the Bands: bundling orders for software, hardware, and other goods and services may mean lower unit costs and greater reach for limited dollars; more responsive / better quality service; more opportunities and more negotiations drive into the process the requirement that Indigenous-owned businesses and individual workers are required to participate in the process; among other benefits.

Use of procurement can also amplify economic development programming objectives toward strategic involvement in key sectors, building of capacity for both workers and businesses (noting that Indigenous Development Corporations are more often using their resources to launch businesses and Indigenous-owned enterprises, as well as employment of individuals).

- Creating consistency of approach and an Atlantic-wide network to support a more effective use of Indigenous procurement as an economic development tool could precipitate several important benefits including:

- Having the effect of making the Indigenous economy more 'one-stop' for non-Indigenous business owners.
 - Helping potential non-Indigenous partners to better understand the scale and the benefits of partnering with Indigenous enterprises.
 - Showing the way to use Indigenous contracting opportunities to optimize local economic benefits to Indigenous communities.
 - Further, the network itself may become a tool through which non-Indigenous companies with benefits agreements and local economic benefits commitments (formal or otherwise) can fulfill their commitments.
- These impacts occur within a context of a number of longstanding and systemic barriers faced by Indigenous people. The barriers include:
 - **Expressed preference not to leave communities:** In this research and reinforced in other research, it is evident that one of the main barriers facing Indigenous people is the fact that the majority are not motivated to leave their community to pursue work and, in some cases, even for training. This relates to the challenge that, in more urban settings or off-reserve settings, it becomes more difficult for Indigenous people to remain connected to their culture and to have access to culturally-based support services to assist them in making that transition successfully. Individuals who live in more rural communities and have had limited exposure to the off-reserve environment reportedly experience greater culture shock when they do leave the community for training or employment, which may result in them not completing training or work experience and having to return to their community.
 - **Skills deficits:** A common finding in the research highlights a lack of proficiency in math and literacy skills which is having a negative impact on both educational and occupational outcomes for Indigenous people. This has been identified as a challenge for Indigenous apprentices and for those attempting to pass other credentialing processes required to progress within various training programs. There is also a lack of support available to help individuals secure the specific essential skills they require, in particular, those related to math and literacy skills. In spite of the representation of Indigenous people in the trades sector, on par with the general population, Indigenous people are not generally completing apprenticeship programs and attaining journeyman status at the same rate as the non-Indigenous population. Notwithstanding the highly favourable demography of Atlantic Indigenous communities, these issues may have the impact of limiting options, particularly, for Indigenous youth, a matter that was of concern to key project stakeholders.
 - **Lack of Indigenous mentors and role models:** Students often point to the challenging lack of Indigenous mentors and role models. For Mi'kmaq apprentices particularly, this is seen as a challenge and one which, if addressed, has the potential to result in better outcomes.

- **Land management issues:** By virtue of section 91(24) of the *Constitution Act* of 1867, the federal government has exclusive jurisdiction over matters relating to 'Indians and lands reserved for the Indians'. A reserve is defined in s. 2(1) of the *Indian Act* as a tract of land set aside by the federal government for the use and benefit of a Band. Title to the reserve remains in the name of the federal government. The *Indian Act* establishes what types of interests are allowed on reserve and gives the Federal Minister final authority to grant virtually all transactions – unless an Indigenous entity has taken over the jurisdiction under treaty, self-government or a sectoral initiative. Setting up a business on reserve usually entails the use of reserve lands. This may involve the use or leasing of land or buildings in the operation of the business, or the actual development of the land itself. The use of land within a reserve and the nature of the 'ownership' are very different from lands off-reserve. Under this system of land management, because Indigenous Bands or on-reserve entrepreneurs do not own the land on which their businesses operate, they are unable to secure capital by pledging this asset. Those who oppose this system point to land tenure under Fee Simple as a desirable alternative. They point to the normalizing influence it has in making Indigenous people more like other Canadians. When a party owns the Fee Simple title to lands, it is registered at the local Land Title Office and it can be used to securitize a loan or other financial instruments. In reality, many Indigenous groups are getting around these challenges by keeping some lands in Fee Simple tenure. Some advocates point to the current situation as being a significant contributor to the economic and social challenges that Indigenous people face. While there is no unanimity on what it would take to 'fix' the land management system for Indigenous people, it was clear during the outreach and engagement process that this issue is on stakeholders minds and is seen as a factor in holding back the Atlantic Indigenous Economy.
- **Access to Capital:** Access to capital is the lifeblood of economic development. That the Atlantic Indigenous Economy has done as well as it has is remarkable given the challenges that Indigenous groups and entrepreneurs face in relation to access to capital. As referenced above, the inability to pledge land as collateral for loans closes off an important source of capital universally exploited by non-Indigenous business. Current land management practices also often impede investment attraction because investors want greater certainty, and even if accommodations which are possible under the *Indian Act* are able to be reached, they are time consuming, complex and require extensive legal stewardship, factors that often create a disincentive to investors. In addition, mainstream lending services are often not available to Indigenous groups and entrepreneurs. This is changing; though, there is considerable ground to make up.
- Indigenous entrepreneurship is alive and well and is finding expression in both growing existing ventures and establishing new ventures. While more information is needed to pinpoint the exact number of Indigenous-owned enterprises, the research conducted within this study suggests that 300 such businesses are active within the Atlantic Region. On a per capita basis, this number is expected to double over the next ten years, based on

input from key informants who expect the Indigenous population base to also double during the same period. This study suggests that momentum in new Indigenous-owned business start-ups has increased over the past ten years and reinforces the growing success of the programs and interventions designed to increase entrepreneurship and the number of Indigenous-owned businesses. This is a positive trend that is expected to continue and is a metric that should be carefully monitored going forward.

- Indigenous communities and Indigenous entrepreneurs are having a positive economic impact not only on their own communities but on adjoining communities and their respective provinces as well. The vast majority of the direct spending associated with the Atlantic Indigenous Economy is spent locally: within the broader communities around Indigenous communities, the region, and the province – very little is leaked outside the immediate geographic locus of the community.
- The demography of Indigenous communities is more favourable than non-Indigenous communities, a factor that means that employment opportunities for Atlantic Indigenous people are likely to be promising going forward. Importantly, this factor also means that Indigenous workers can play an important role in addressing labour supply issues.
- This study can help address prevailing myths in respect to Indigenous economic development. The study compellingly illustrates Indigenous communities are a significant net contributor to the Atlantic economy. The findings of this study show real progress and success in important sectors – energy, the fishery as well as some forestry ventures – and augur well for future development in these sectors and the beneficial exploitation of major projects.

The study also underscores the close link that Indigenous communities forge between social and economic impacts/outcomes. This embodies important Indigenous values and is a differentiator between Indigenous and non-Indigenous communities.

- There are fundamental differences between the demographic and societal make-up of the Indigenous communities and the non-Indigenous communities, as well as some interesting similarities. While educational attainment, median income, and age are very different, the percent of income from earnings and the level of participation in trades occupations are similar. Among characteristics that stands out most in an economic development context is that the largely rural-based population of Indigenous people are 3/4th of a generation younger (median age difference of 15 years) than the general population. The Indigenous labour force represents an important resource for the both the non-Indigenous and Indigenous business community in respect to access to labour and succession planning in a region characterized by outmigration, limited success in retaining new immigrants, declining birth rates, an aging population and increasing migration from rural to urban areas.
- The preceding point highlights the importance of continuing to evolve the project outreach and engagement tools developed as part of this project, continuing the engagement process, advancing the B2B exchange, and linking these tools to all sized

operations: small, medium, and large enterprises. Among the recommendations advanced by the participating stakeholders was the notion of an Atlantic Indigenous Chamber of Commerce. Although tried in the past, a new attempt with an Atlantic-wide mandate may be the structure through which many of the above observations could be embodied and implemented. A go-forward business plan for an Atlantic Indigenous Chamber of Commerce may need start-up funding and a clearly leveraged value proposition for registering businesses. Own source revenues may be achieved through the Chamber taking on roles to support benefits agreements, taking a percentage as the arbitrator of the benefits agreement fulfilment and a monitoring and reporting role. It could also take on the role of implementing an Indigenous First policy in respect to procurement opportunities. The Chamber could also fill an important role in tracking local economic benefit impacts during projects to ensure accountability through use of a custom-designed accountability framework with accompanying monitoring, and reporting tools.

Ultimately, this study is replicable, enabling APC to continue to gauge progress in the Atlantic Region. Beyond the numbers, the study and, particularly, the input of key stakeholders throughout also re-affirm some of the challenges which need to be addressed.

Appendix A: Detailed Community Demographic Profile

The following table provides a summary of key demographic data assessed within this report.

Indicator ¹³	NL	PE	NS	NB	QE	AIE	General Population
Total Registered Population	29,867	1,312	16,543	15,559	7,409	70,690	70,690
Age 0-19	42%	39%	42%	37%	38%	40%	22%
Age 20-64	55%	58%	52%	57%	54%	54%	63%
Age 65 and over	3%	5%	5%	6%	8%	5%	15%
Median Age	26	27	27	30	29	28	43
Education							
No degree, certificate or diploma	61%	35%	39%	39%	40%	42%	23%
High school diploma or equivalent only	12%	24%	21%	26%	23%	22%	22%
Trades/apprenticeship or other non-university certificate	22%	31%	27%	27%	29%	27%	32%
University certificate below bachelor level	1%	3%	4%	3%	3%	3%	4%
University degree (bachelor level or higher)	4%	6%	9%	5%	5%	6%	18%
Sources of Income (%)							
Earnings - % of income	77.7	69.0	66.0	69.5	66.5	69.7	70.6
Government transfer - % of income	20.0	28.0	31.3	28.2	32.0	27.9	16.8
Other money - % of income	2.0	4.0	2.9	2.9	1.5	2.7	12.8
Median household income (\$)	\$48,489	\$39,503	\$26,907	\$27,974	\$31,204	\$34,815	\$53,550
Labour Force (%)							
Participation rate	69.8	72.5	52.5	61.7	61.1	63.5	63.8
Employment rate	48.7	52.9	40.3	42.8	35.1	44.0	56.8
Unemployment rate	29.0	21.2	20.5	31.9	43.1	29.1	11.0
Industry							
Agriculture, resource based	4.0%	20.0%	5.7%	6.6%	3.8%	5.9%	2.3%
Manufacturing, construction	3.5%	2.9%	4.4%	5.7%	3.8%	4.6%	11.5%
Wholesale, retail	3.8%	5.7%	5.4%	5.3%	2.9%	4.9%	11.1%
Finance, real estate	0.0%	0.0%	0.3%	0.2%	0.6%	0.2%	3.4%
Health, education	18.8%	7.1%	11.6%	9.7%	11.3%	11.7%	13.4%
Business services	1.6%	4.3%	3.1%	2.7%	4.3%	2.9%	7.1%
Transportation, warehousing	0.5%	0.0%	0.5%	1.1%	0.6%	0.7%	3.0%
Other services	40.9%	38.6%	23.5%	28.2%	28.3%	28.2%	16.6%
Occupation							
Management	12.0%	12.9%	8.5%	10.1%	11.0%	9.9%	17.5%
Natural sciences, health	4.2%	0.0%	2.3%	3.8%	5.5%	3.4%	8.9%
Social sciences, gov't	21.6%	12.9%	12.2%	10.6%	11.3%	12.8%	8.1%
Sales and service	14.6%	14.3%	13.0%	14.1%	9.0%	13.2%	16.7%
Trades and related	14.1%	8.6%	9.0%	9.1%	11.3%	9.9%	9.8%
Primary industry	3.3%	21.4%	7.4%	9.8%	4.3%	7.7%	1.6%
Other Occupations	4.2%	4.3%	2.2%	2.0%	2.3%	2.5%	5.6%
Mobility							
% Non-Movers	84%	87%	91%	91%	96%	90%	88%

¹³ Indigenous and Northern Affairs Canada, Community Profiles:
<http://fnp-ppn.aandc-aadnc.gc.ca/fnp/Main/index.aspx?lang=eng>

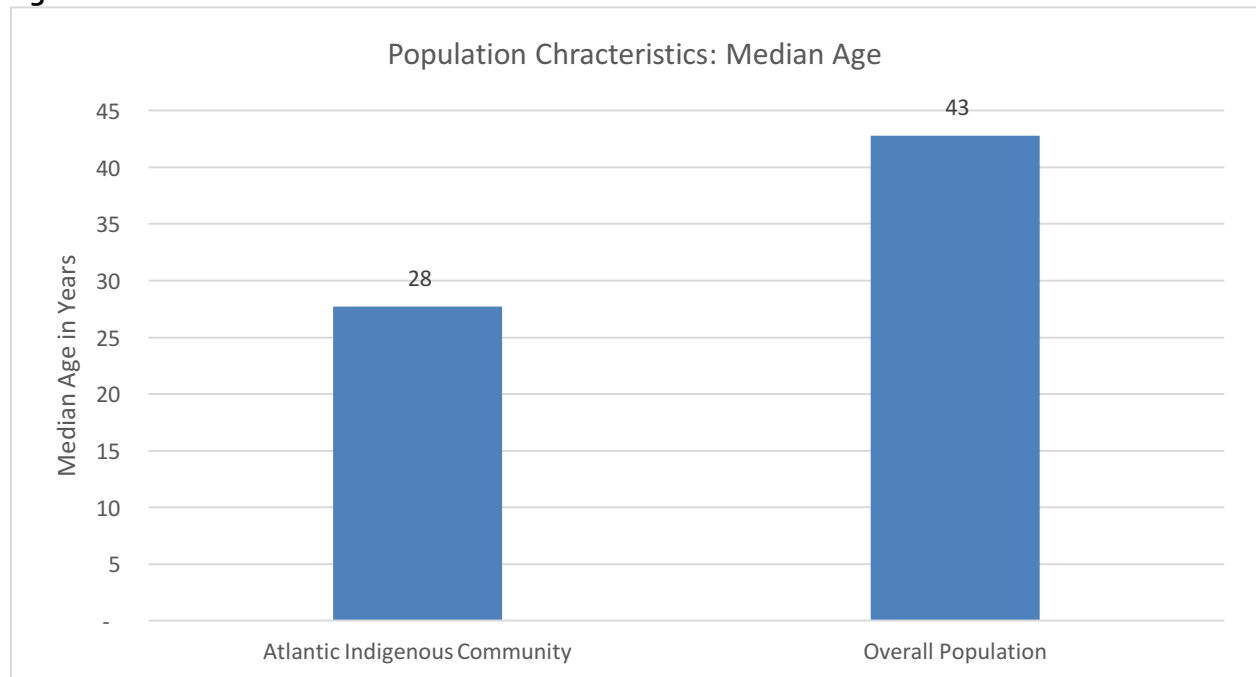
Note – Values reported at the provincial level and the Atlantic Level are averages of values provided in INAC. Better estimates can only be derived from raw data on each community: raw data was not available to the team.

Social / Demographic Profile: Atlantic

The table above was derived through compiling INAC data available as Indigenous Community Profiles. As shown in the table above, the registered population of Indigenous communities in the Atlantic region totaled 70,690. This was almost evenly split between registered females (51%) and males (49%). The majority of both registered females (63%) and males (61%) were off reserve. The bulk of the remaining females (36%) and males (38%) were on reserve.

A relatively small segment (1%) of the registered population was classified as living on other reserves. A very small number – 45 residents in total – were in the remaining categories of no band crown land, own crown land and other band crown land.

Age Characteristics

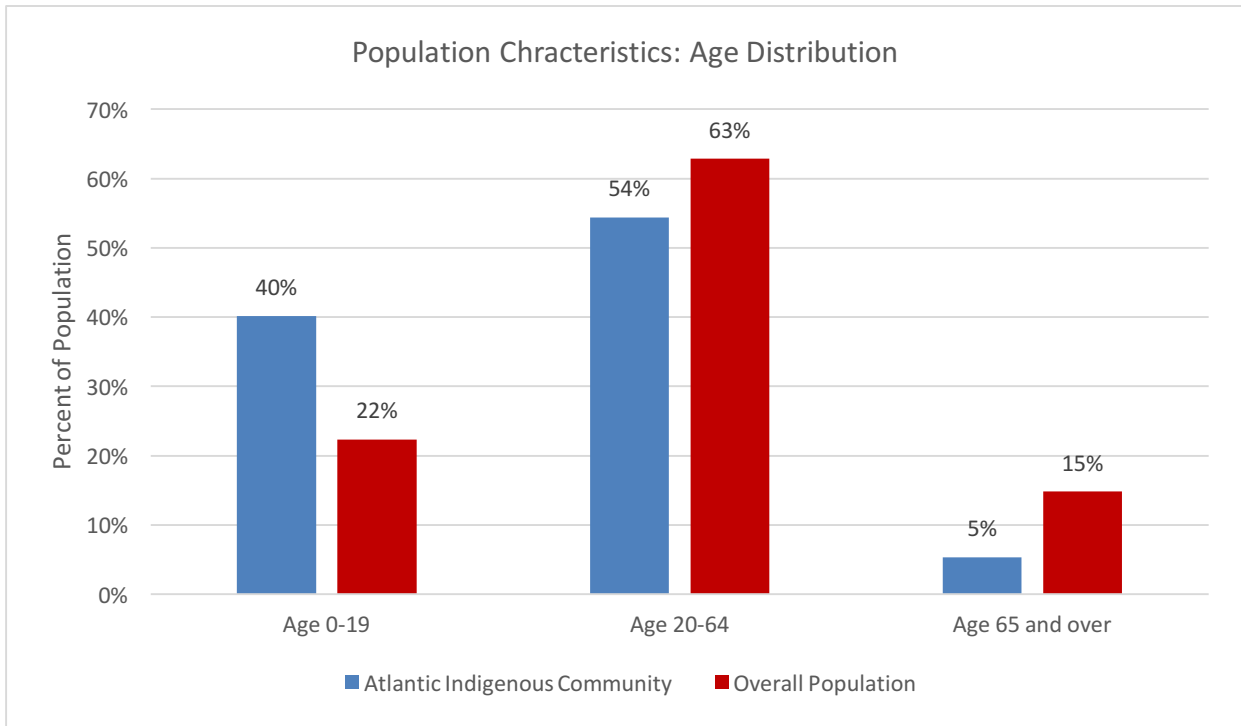


Indigenous people are considerably younger than the overall population of the Atlantic region. The median age for Indigenous people was 28, relative to 43 for all residents – a difference of 15 years.

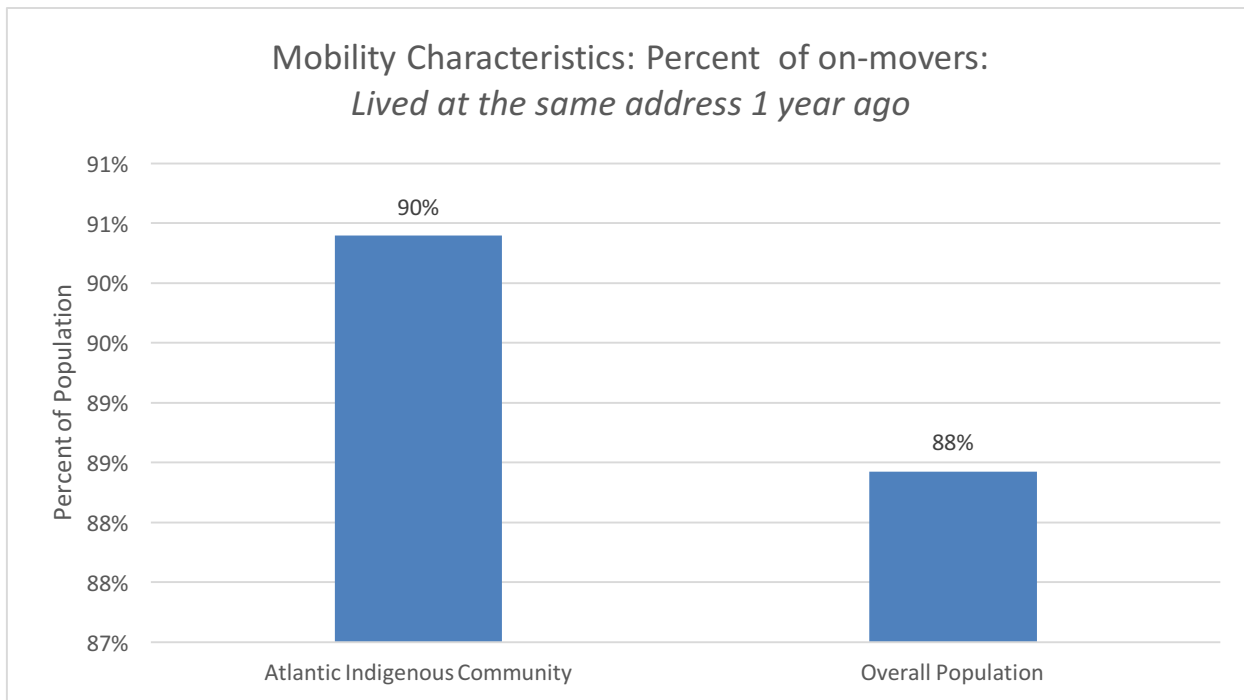
A review of the age distribution highlights the differences between the Indigenous and overall population of the Atlantic region. The share of Indigenous people (40%) in the youth segment (0-19) is almost twice that of the overall population (22%).

Just over one half (54%) of Indigenous people fall in the 20-64 age demographic, compared to 63% for the general population. Additionally, the demographics highlight a considerable disparity in the 65+ segment.

There are relatively few (5%) Indigenous seniors compared to the overall number of seniors resident in the Atlantic region (15%).



Mobility

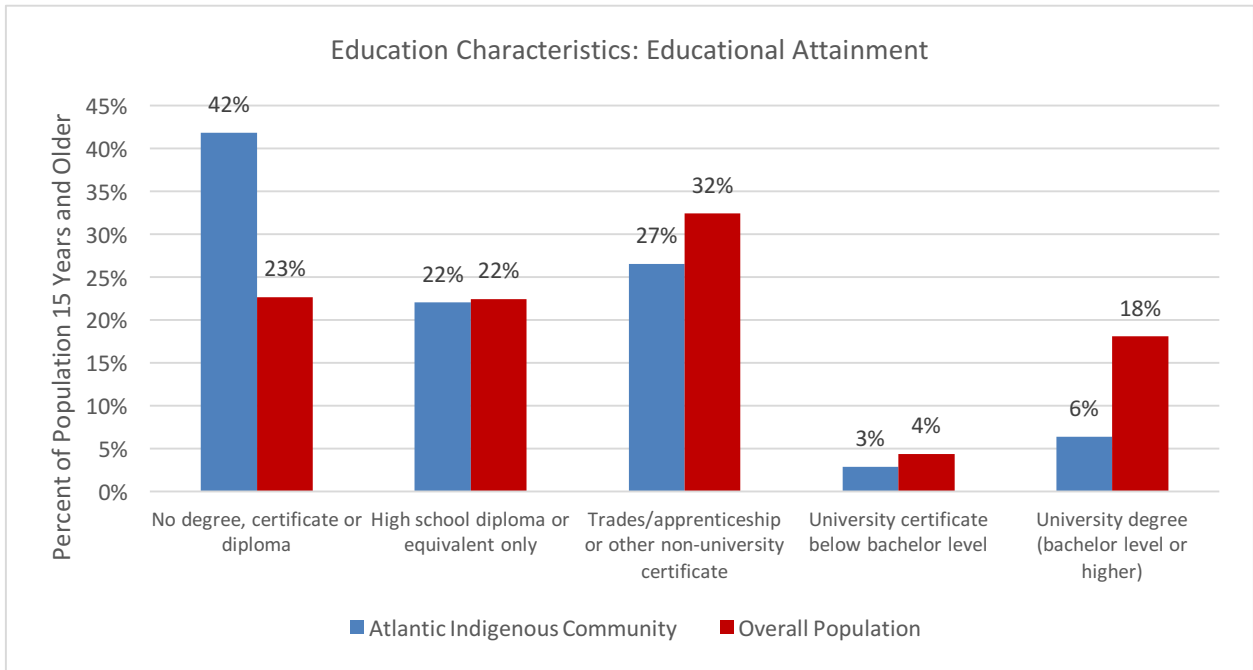


Indigenous residents in the Atlantic region were slightly less mobile than the general population. Regionally, nine in ten (90%) Indigenous residents lived at the same address as they did one year previously. This compares to 88% for all residents in the region.

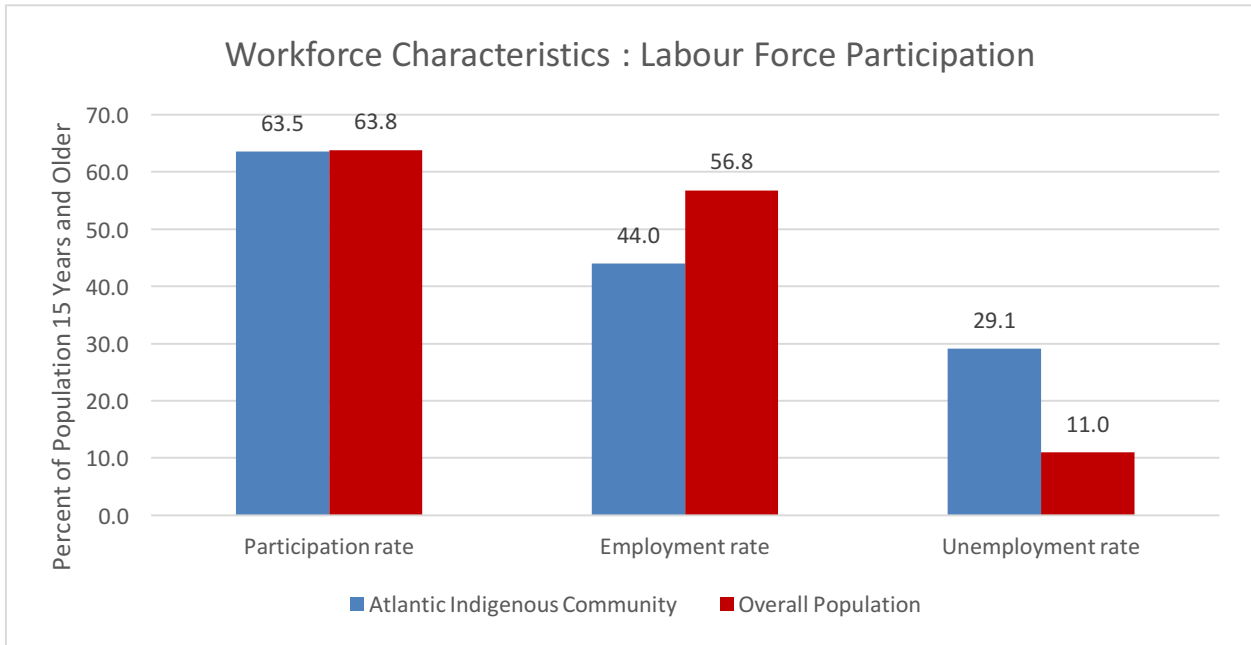
Educational Attainment

Relative to the general population, educational attainment was generally lower for Atlantic region Indigenous people. Four in ten (42%) of Indigenous people did not hold a post-secondary degree, certificate or diploma compared to 23% of the overall population. Two in ten (22%) Indigenous people held a high school diploma – the same trend as prevails with respect to the region’s general population.

One quarter (27%) of Indigenous people received a trade or apprenticeship designation compared to one-third (32%) of the overall population. The rate of university certification (3%) was comparable to the regional rate. The university graduation rate among Indigenous people (6%) was a third of the provincial rate (18%).

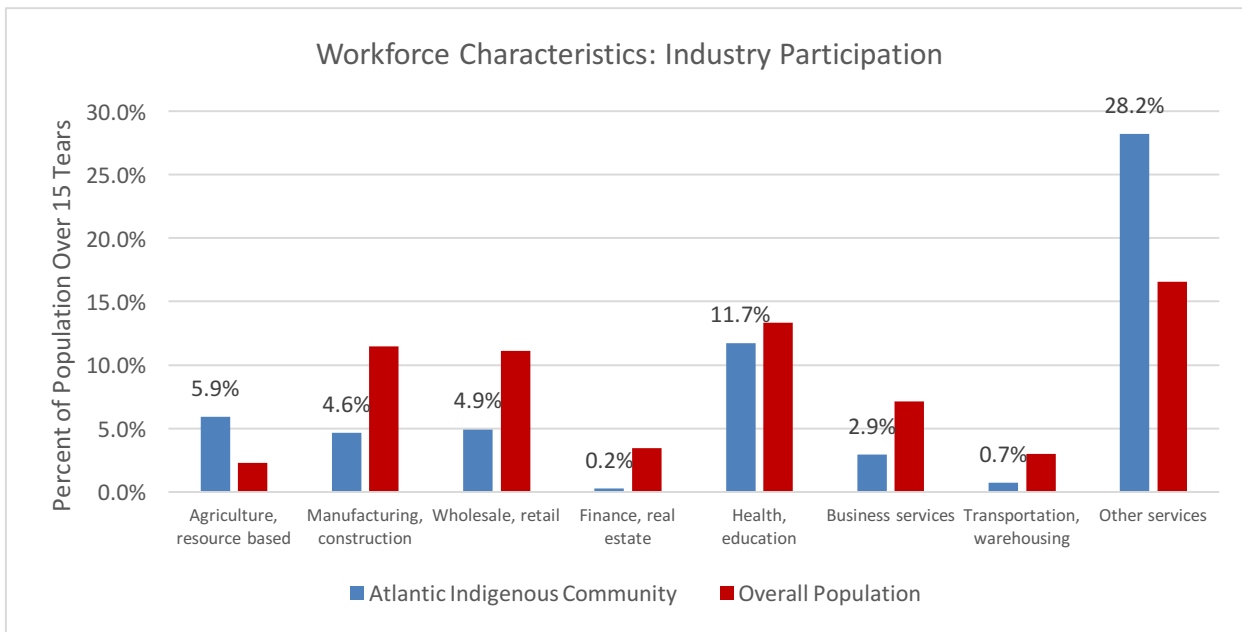


Labour Force Participation Labour force participation among Indigenous people in the Atlantic region was on par with the overall provincial participation rate of 64%. However, the employment rate of 44% for Indigenous people was lower than the provincial employment rate of 57%. Combined, these factors created a sizable gap in the unemployment rate between Indigenous people and the general population. The Indigenous unemployment rate (29%) was nearly three times that of Atlantic Canada (11%).



Industry Participation

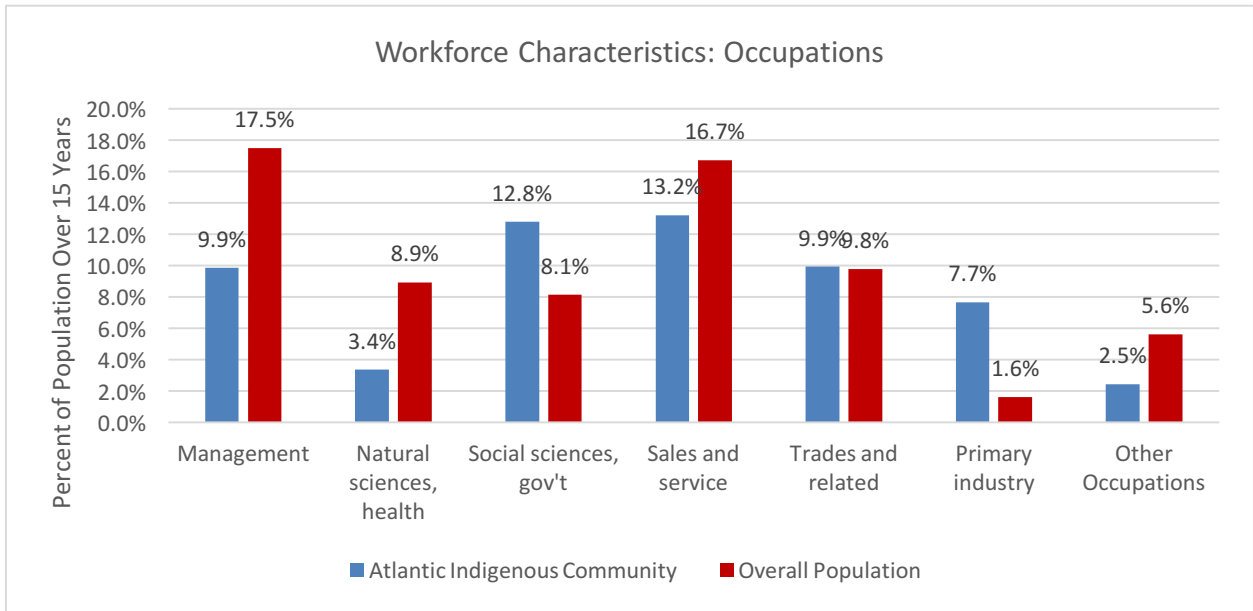
Atlantic region Indigenous people were most likely to work in the 'other services' sector. Three in ten (28%) Indigenous people in the region were employed in this category, compared to 17% for the general population.



The only other industry where Indigenous employment exceeded the overall population was agriculture/resource based (6%). The relative frequency of employment among the overall regional population exceeded that of the Indigenous population for the remaining industries including: health and education sector (12%), manufacturing / construction (5%), wholesale / retail (5%), business services (3%) and transportation/warehousing (1%).

Occupational Characteristics

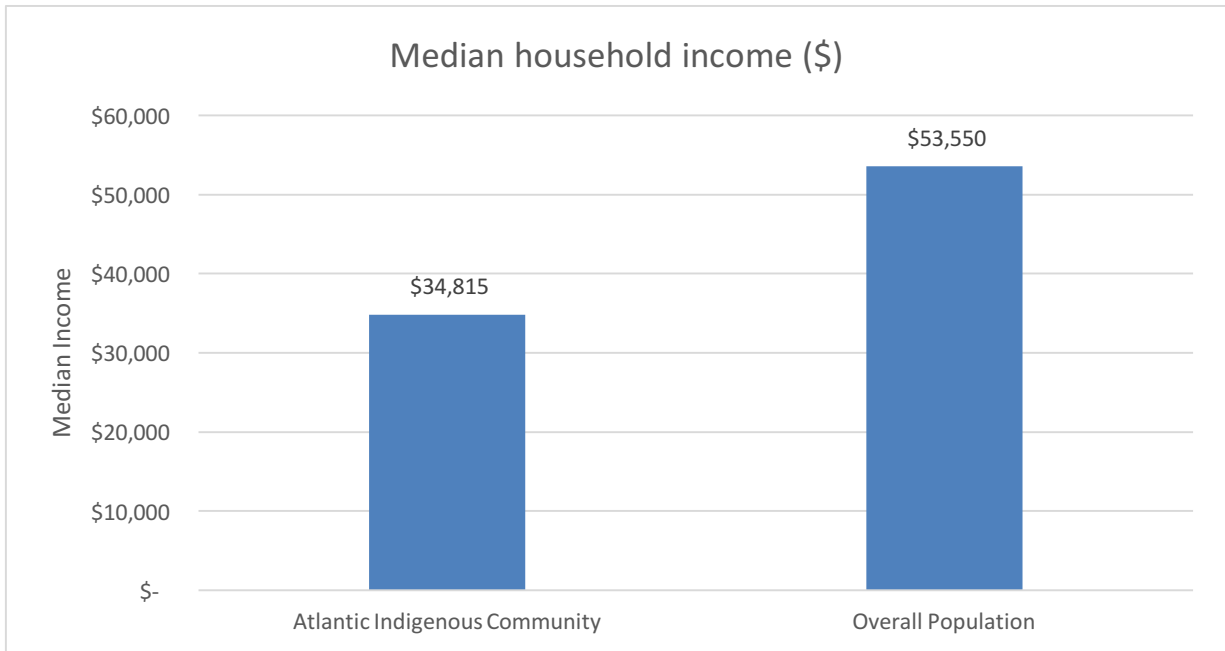
A workforce profile reveals striking differences in the occupational characteristics of the Indigenous and overall populations of the Atlantic region. For example, relative to the overall population, Indigenous employment is considerably lower in management positions (10%); natural sciences and health (3%); and sales and service (13%) occupations.



Alternatively, Indigenous employment was higher in social sciences and government (13%) and primary industry (8%). Employment in the trade related occupations was comparable among both populations at 10%.

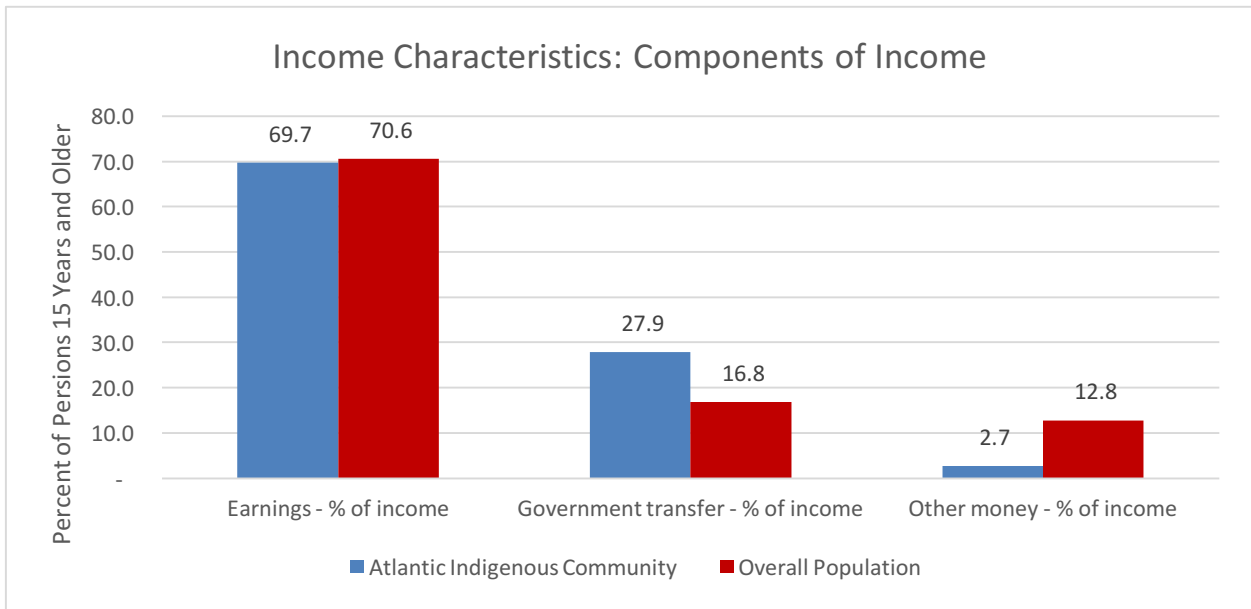
Median Household Income

The median household income for the Indigenous communities of the Atlantic region was \$34,815. This compares to a median household income of \$53,550 for the entire region. Indigenous household incomes were 35% lower than the regional average.



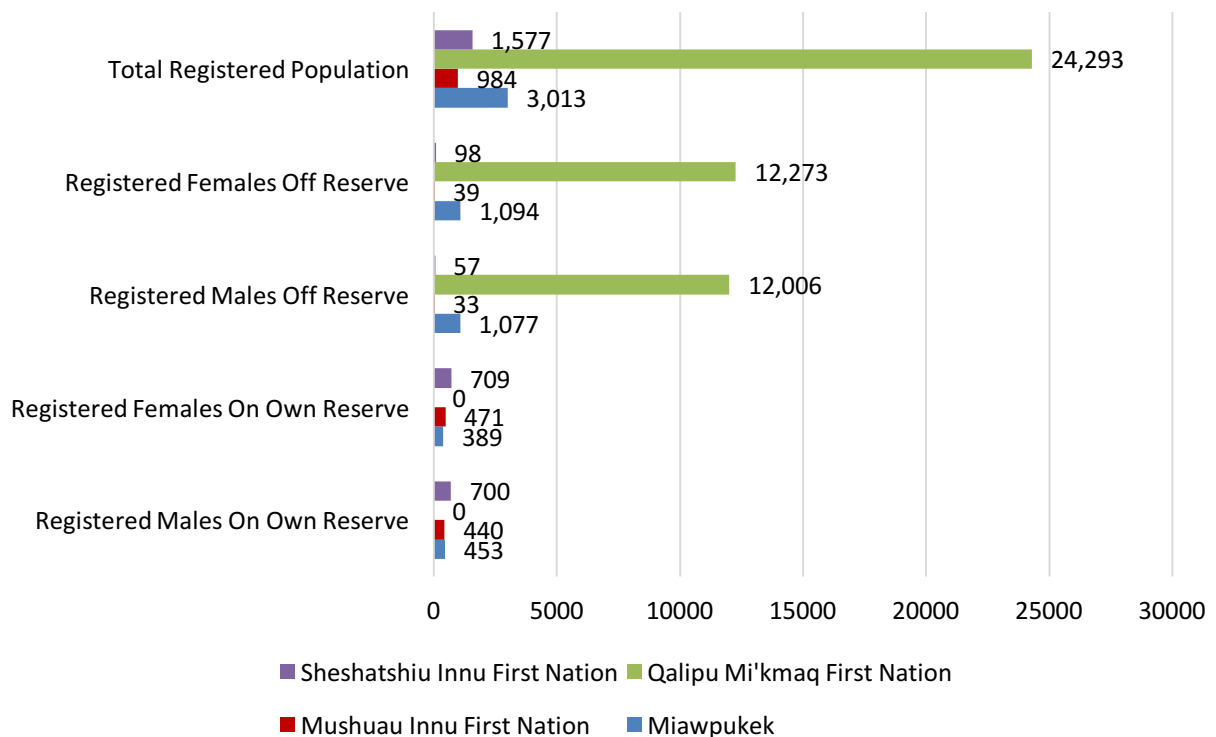
Components of Income

The percentage of income derived from earnings was comparable for Indigenous people (70%) and the overall population of the Atlantic region (71%). The share of income from government transfers was higher for Indigenous people (28%) relative to all residents (17%). This is marked contrast to the share of income from other sources for Indigenous people (3%), compared to 13% for all Atlantic Canadian residents.



Social / Demographic Profile: Newfoundland

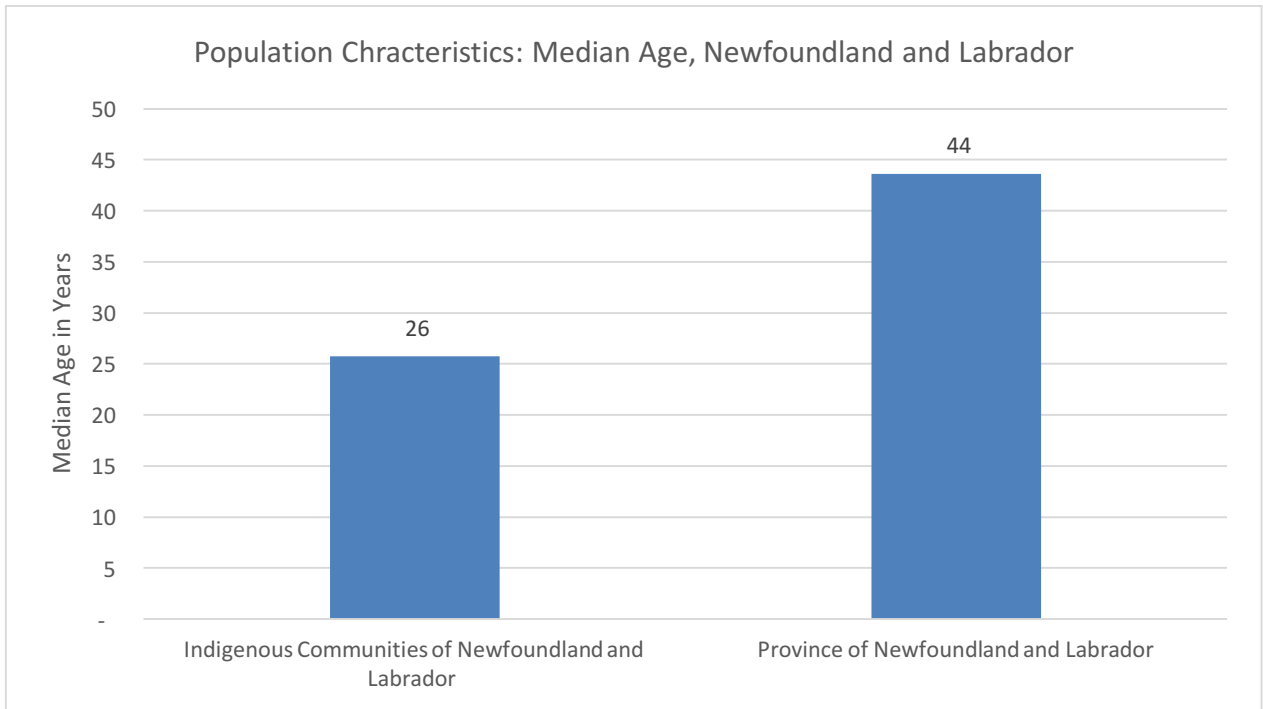
Registered Population, Newfoundland and Labrador



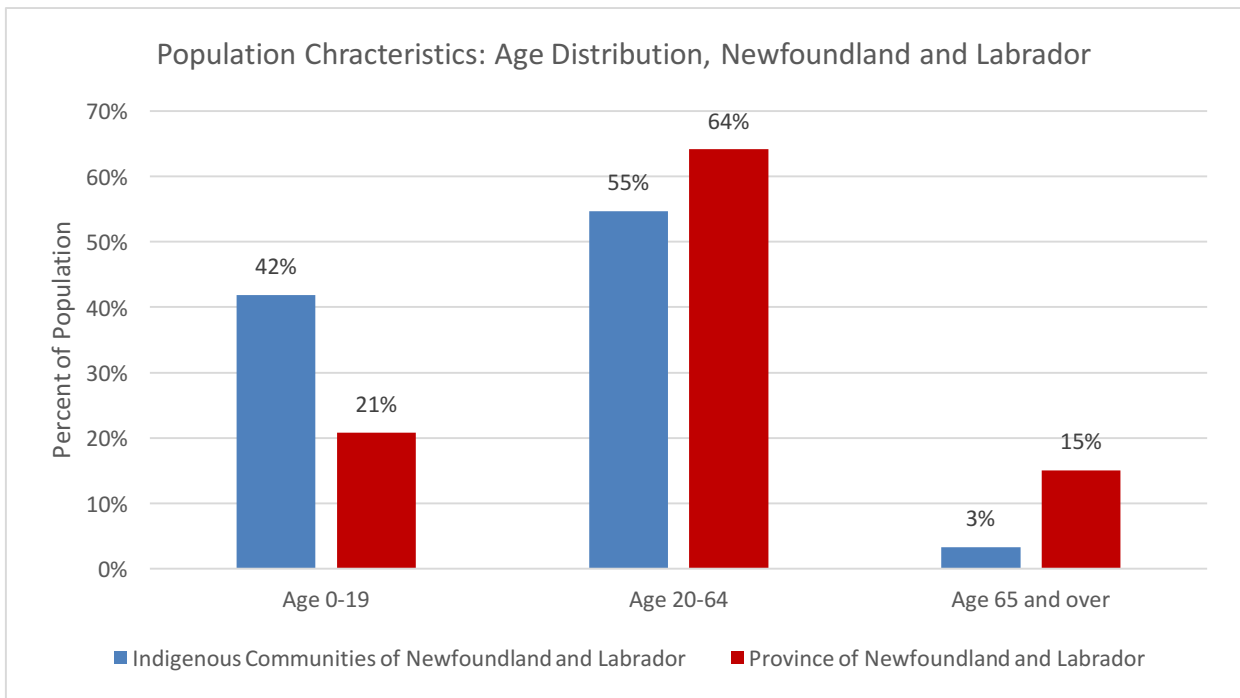
The registered population of Indigenous communities in Newfoundland and Labrador totaled 29,867. This was almost evenly split between registered females (51%) and males (49%). The vast majority of both registered females (90%) and males (89%) were off reserve. Virtually all of the remaining females (10%) and males (11%) were on reserve. A relatively small segment of the registered population (28 residents) was classified as living on other reserves or on no band crown land. No residents were recorded in the own crown land or other band crown land categories.

In comparisons to other provinces, the registered off reserve population is significantly higher. Through a 2008 Agreement and a 2013 Supplemental Agreement, the Government of Canada and the Federation of Newfoundland Indians altered the enrollment process for the Qalipu Mi'kmaq First Nation. Issues with the 2008 Agreement were addressed in the Supplemental Agreement – the 2008 agreement generated 100,000 applicants for membership in the Qalipu Mi'kmaq First Nation. The net effect was a significant increase in membership in the Qalipu Mi'kmaq First Nation, a community currently without its own land/reserve.¹⁴

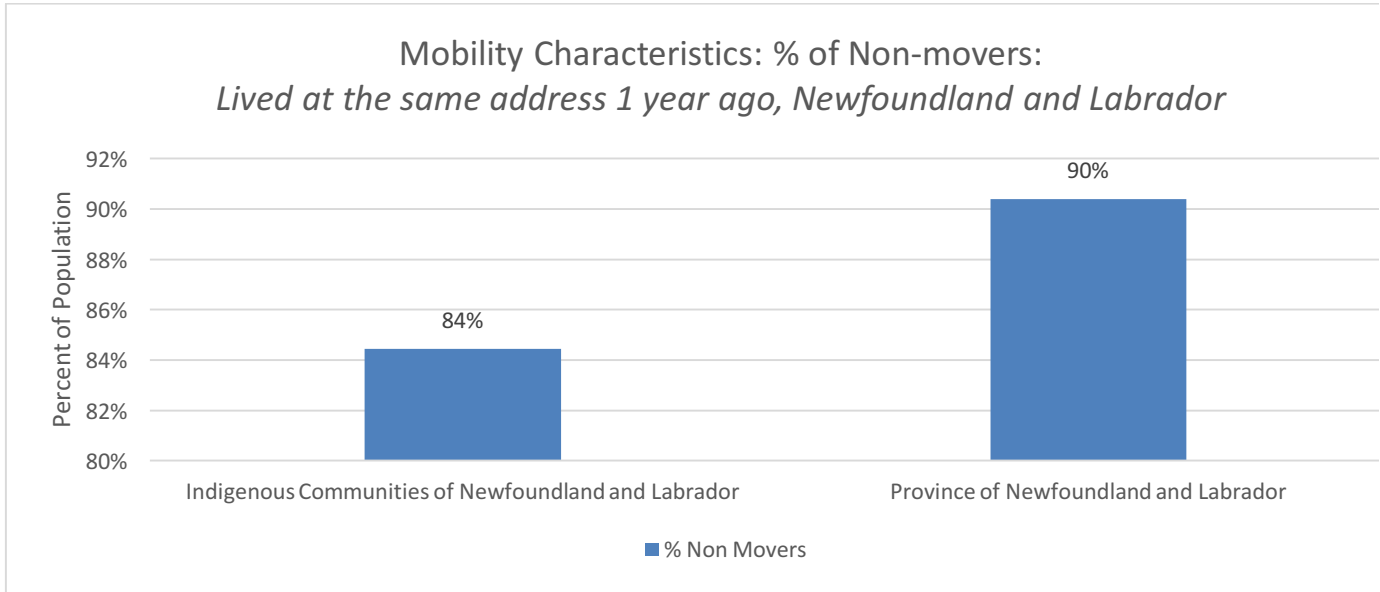
¹⁴ <http://www.theglobeandmail.com/news/politics/ottawa-moves-to-tighten-Indigenous-membership-criteria/article17954032/>



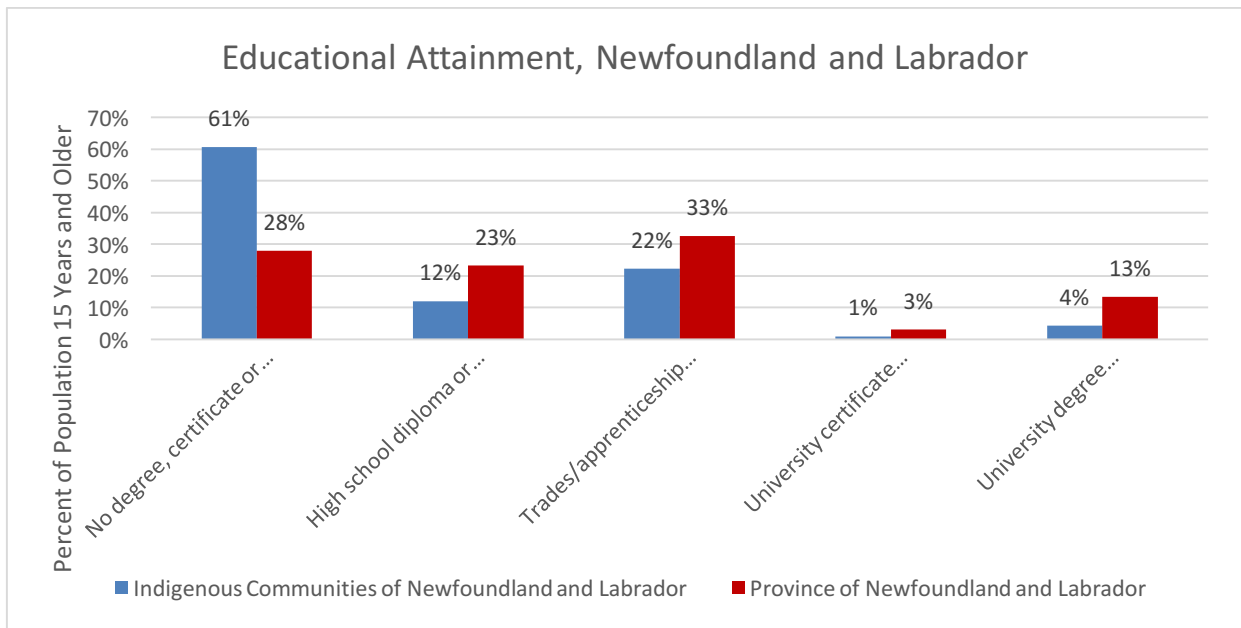
Indigenous people are considerably younger than the overall population of Newfoundland and Labrador. The median age for Indigenous people was 26, relative to 44 for all residents – a difference of 18 years.



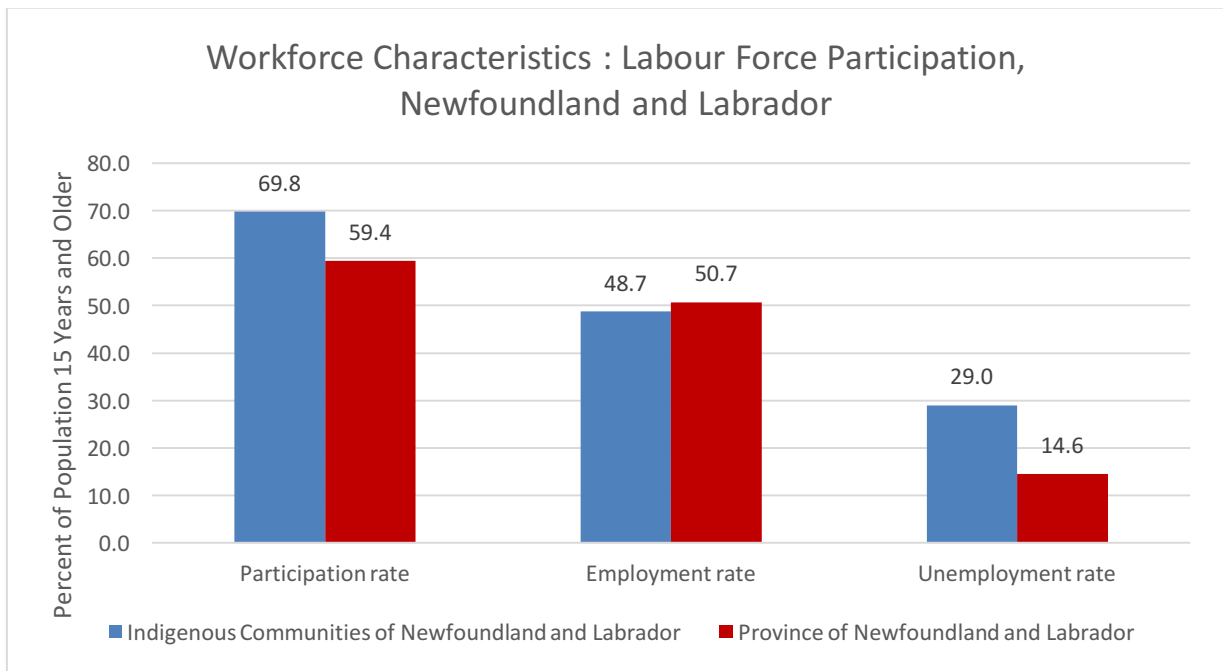
A review of the age distribution highlights the dichotomy between the Indigenous and overall population of Newfoundland and Labrador. The Indigenous share (42%) in the youth population segment (0-19) is nearly twice that of the overall population (21%). Just over one half (55%) of the Indigenous population falls within the 20-64 age group, compared to 64% for the general population. The demographics highlight a considerable disparity in the 65+ segment. Considered within the context of the province as a whole (15%), there are relatively few (3%) Indigenous seniors.



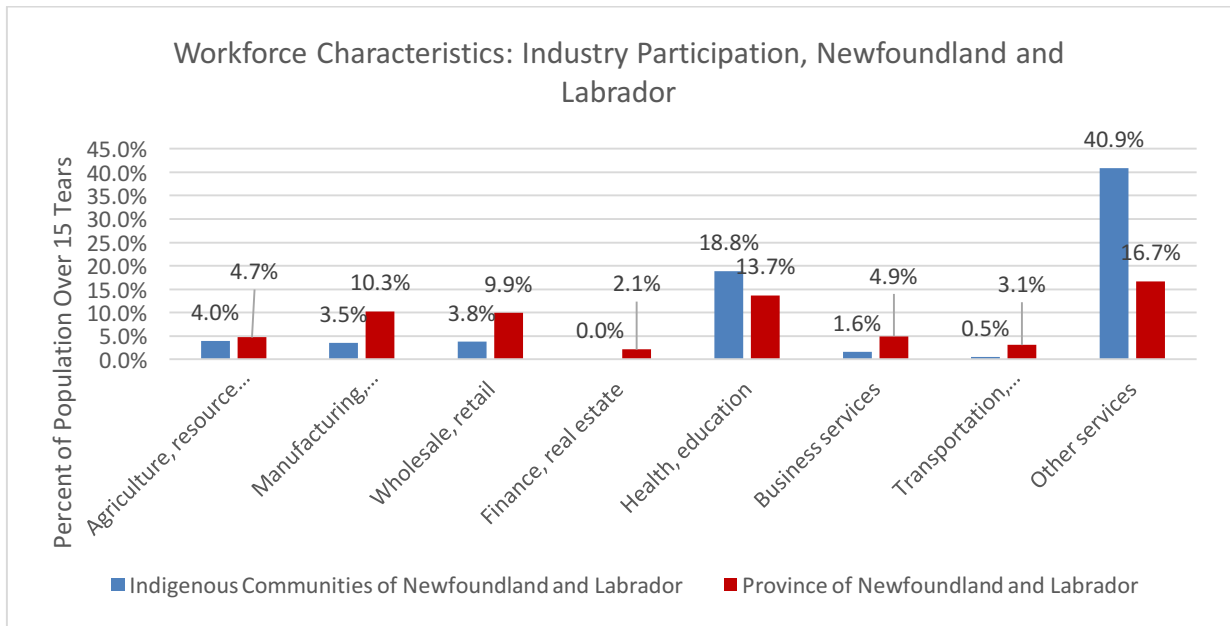
Indigenous residents in Newfoundland and Labrador were slightly more mobile than the province’s general population. Nine in ten (90%) Newfoundlanders lived at the same address as compared to a year earlier. This compares to 84% for Indigenous residents within the province.



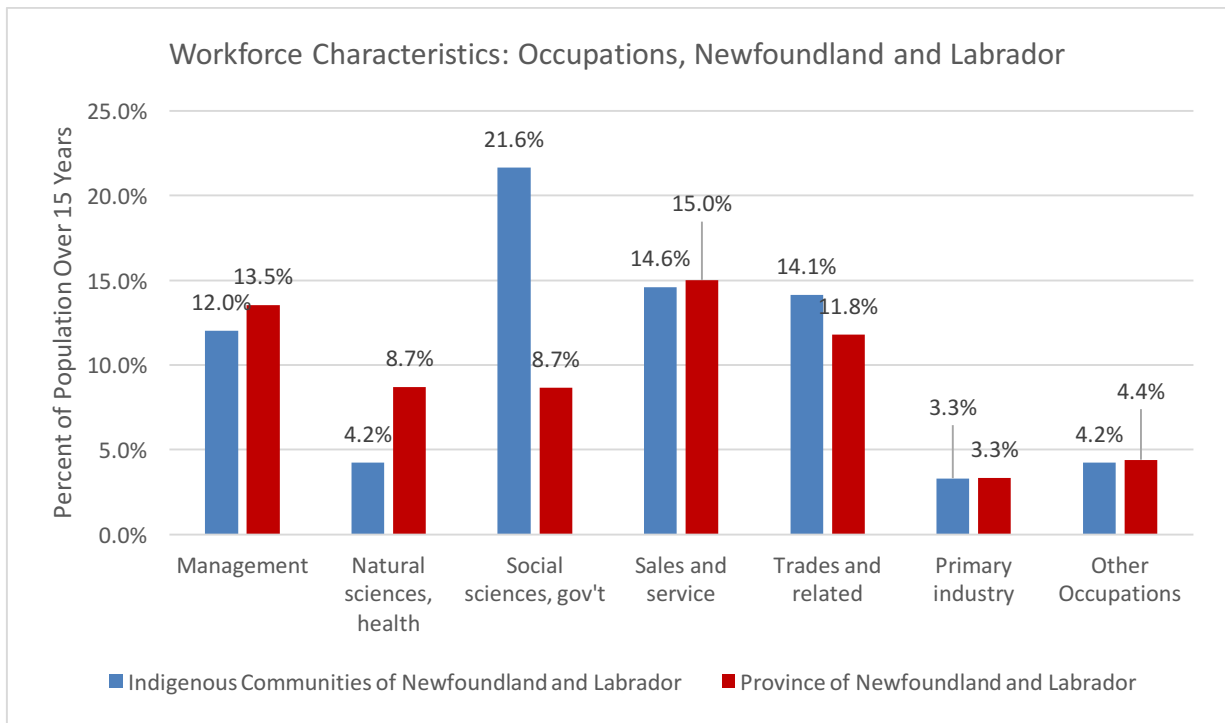
Educational attainment was generally lower for Newfoundland and Labrador Indigenous people relative to the general population. More than half (61%) of Indigenous people did not hold a degree, certificate or diploma, compared to 28% of the overall population. One in ten (12%) Indigenous people held a high school diploma relative to 23% of all Newfoundlanders. One in five (22%) of Indigenous people received a trade or apprenticeship designation compared to one-third (33%) of the overall population. The rate of university certification (1%) and degrees (4%) for Indigenous people was also lower than the provincial rate.



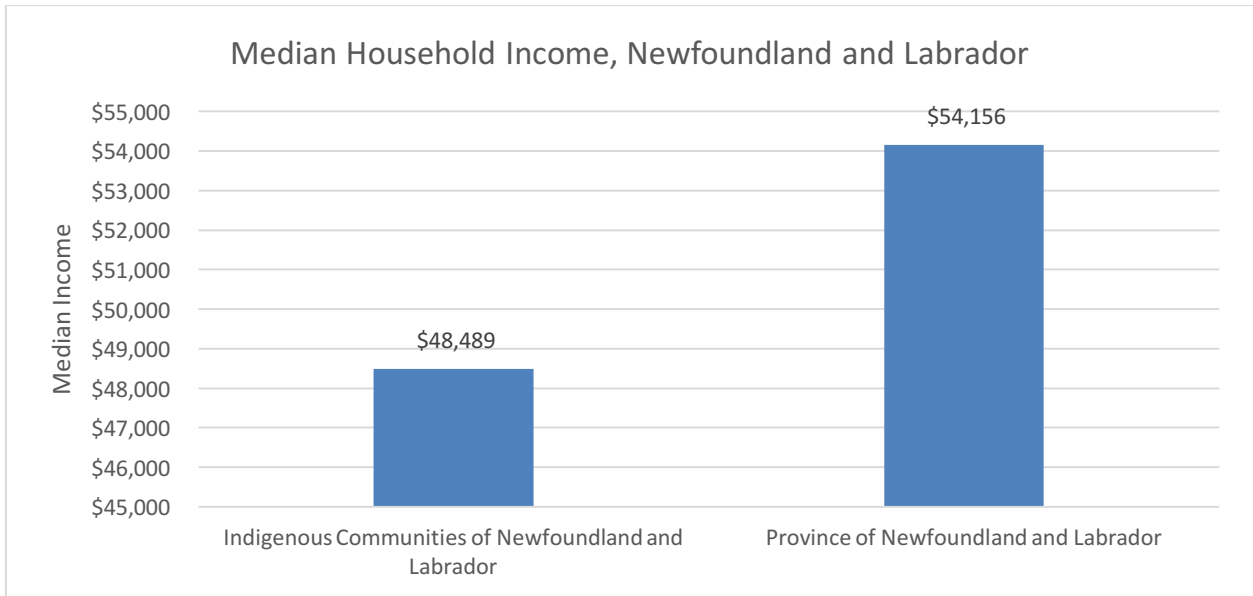
Labour force participation among Indigenous people (70%) in Newfoundland and Labrador was about ten percentage points higher than the overall provincial participation rate of 59% for the province. However, the employment rate of 49% for Indigenous people is slightly lower than the provincial employment rate of 51%. Combined, these factors created a sizable gap in the unemployment rate between Indigenous people and the general population. The Indigenous unemployment rate (29%) was double that for the province as a whole.



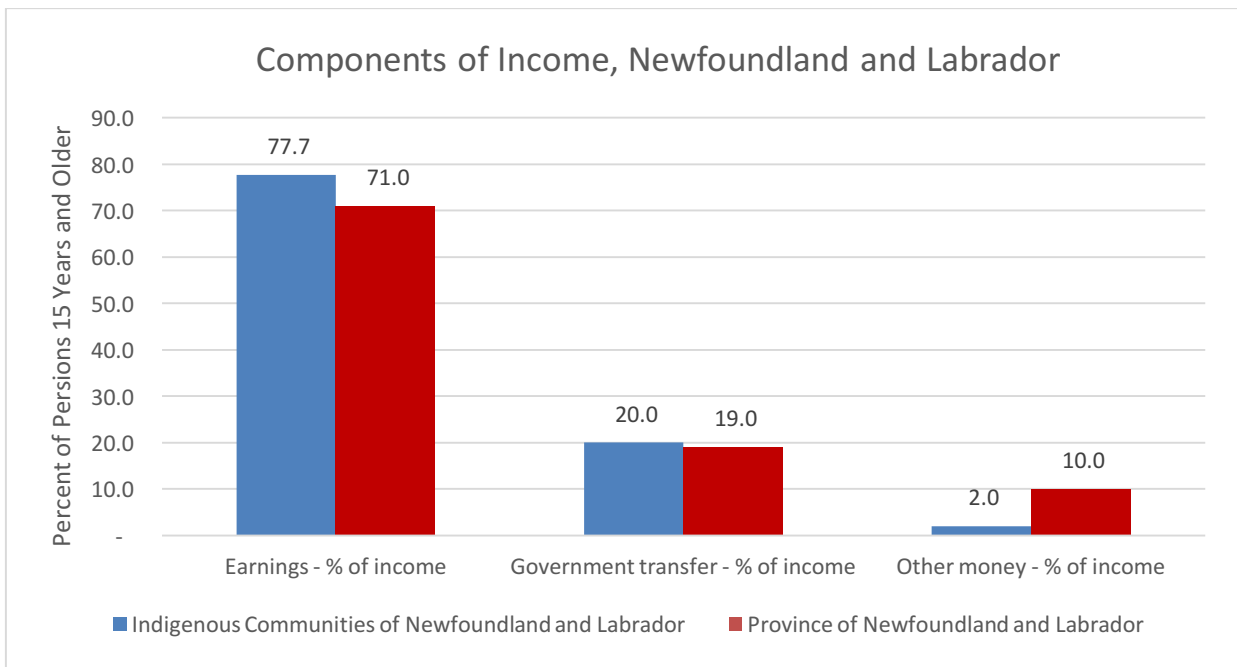
Newfoundland and Labrador Indigenous people were most likely to work in the 'other services' sector. Four in ten (41%) Indigenous people in the province were employed in this category, compared to 17% for the general population. Another 19% of Indigenous people were employed in the health and education sector, compared to 14% for the provincial population as a whole. Other areas of employment for Indigenous people included agriculture/resource based (4%), manufacturing/construction (3.5%), wholesale/retail (3.8%), business services (1.6%) and transportation/warehousing (.5%). Within these sectors, the relative frequency of employment among the overall provincial population exceeded that of the Indigenous population.



A workforce profile reveals striking differences, as well as a number of similarities in the occupational characteristics of the Indigenous and overall populations of Newfoundland and Labrador. Social science and government-related occupations account for 22% of Indigenous employment – more than double the 9% in the overall population. Indigenous employment (14%) is slightly higher in trade related occupations than the overall population (12%). Workforce share in the two populations is comparable in the management, sales and service, primary industry and other occupations. Employment lags among the Indigenous population for the natural sciences and health occupations.



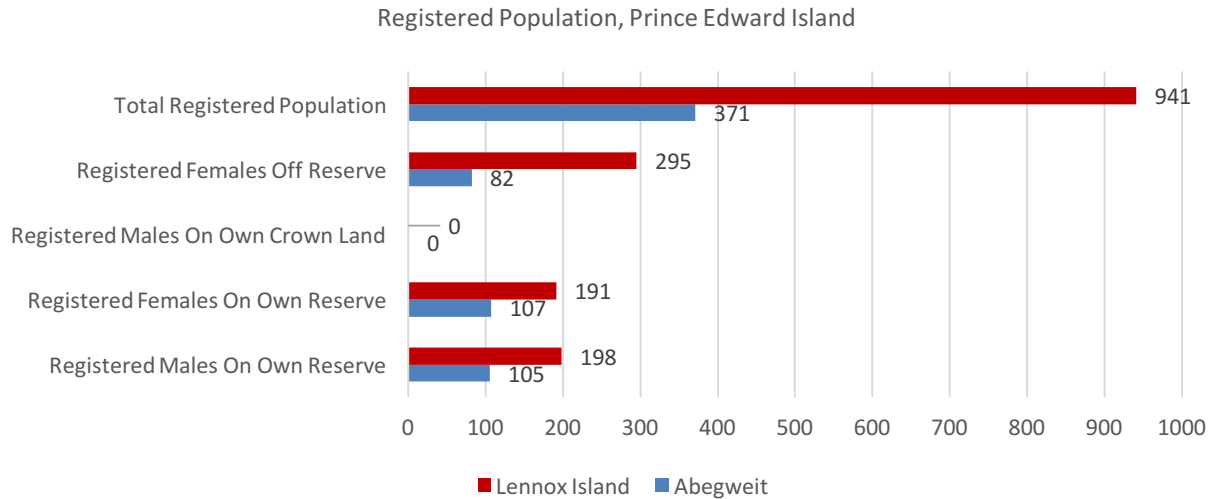
The median household income for the Indigenous communities of Newfoundland and Labrador was \$48,489. This compares to a median household income of \$54,156 for the entire province. Indigenous household income was 10% lower than the provincial average.



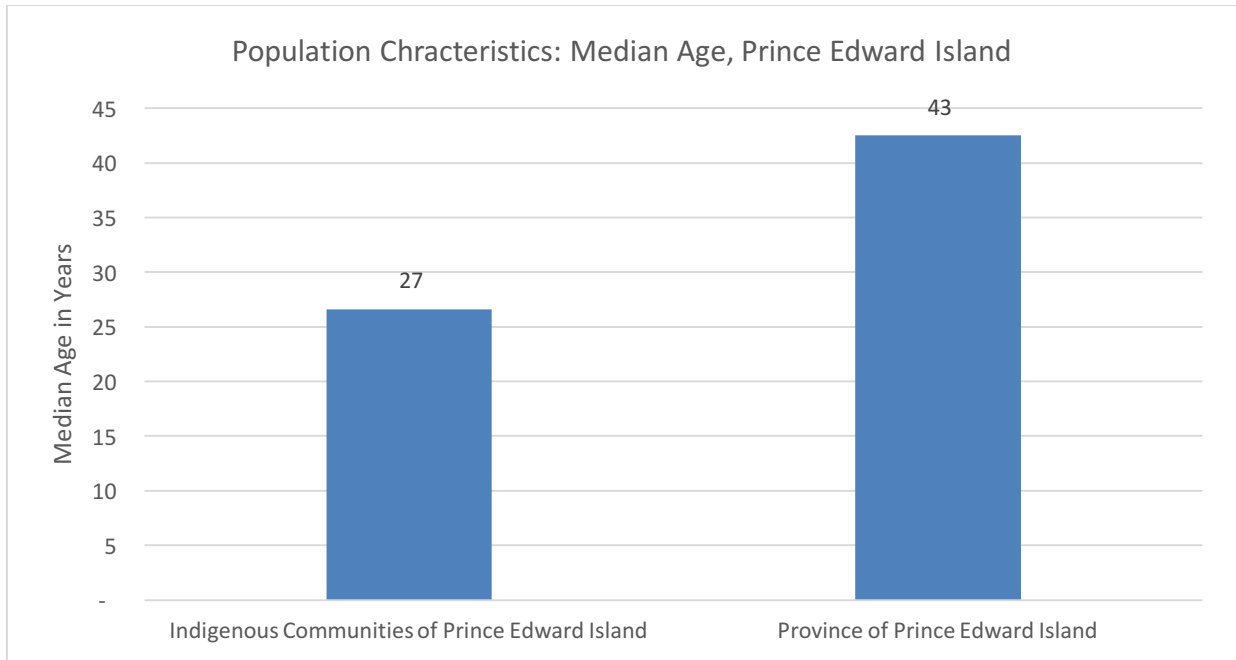
The percentage of income derived from earnings was seven percentage points higher for Indigenous people (78%) than for the overall population of Newfoundland and Labrador (71%). The share of income from government transfers was virtually the same for the two groups –

Indigenous people at 20% and all residents at 19 %. In contrast, the share of income from other sources for Indigenous people was negligible (2%) compared to 10 % for all Newfoundlanders.

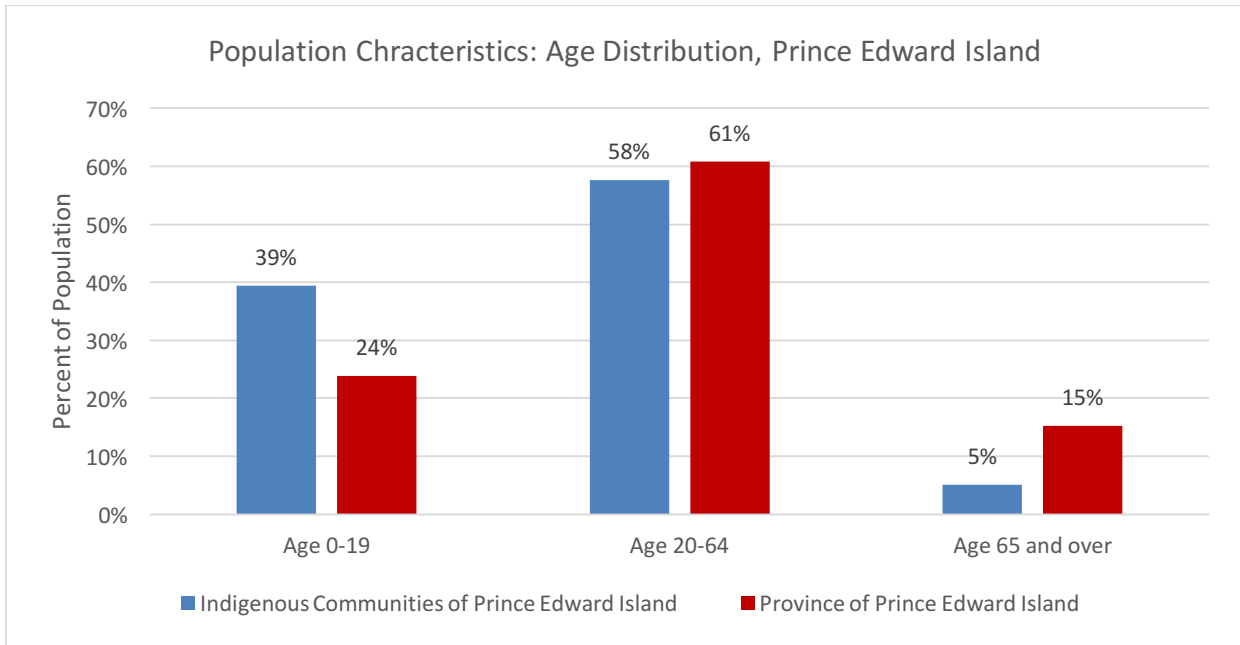
Social / Demographic Profile: Prince Edward Island



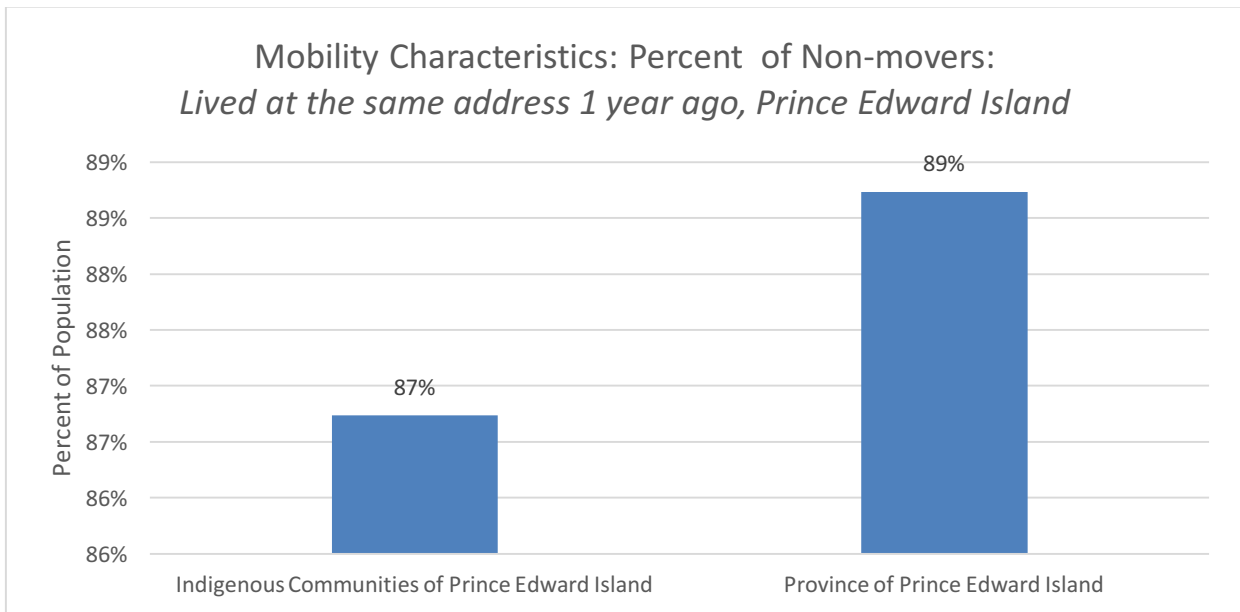
The registered population of Indigenous Communities in Prince Edward Island totaled 1,312. There were slightly more registered females (53%) than males (47%). About half of registered females (54%) and males (50%) were off reserve. Virtually all of the remaining females (43%) and males (49%) were on reserve. A relatively small segment of the registered population – 25 residents – was classified as living on other reserve or on no band crown land. No residents were recorded in the own crown land or other band crown land categories.



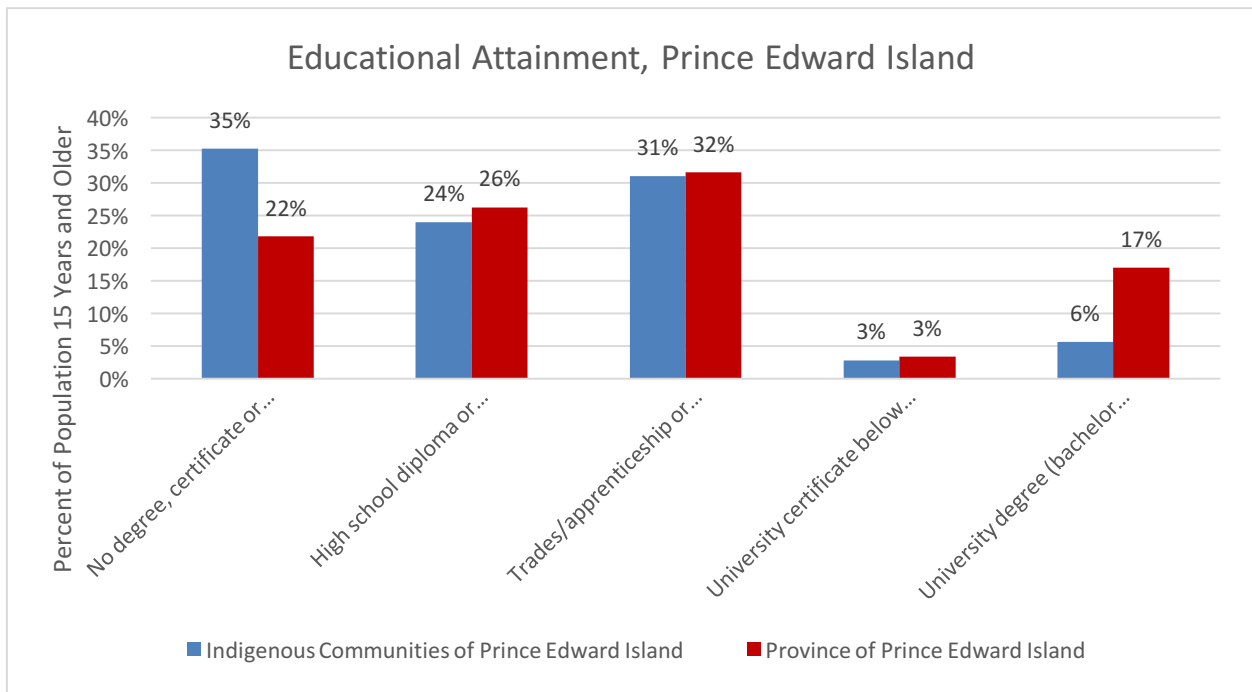
Indigenous people are considerably younger than the overall population of Prince Edward Island. The median age for Indigenous people was 27, relative to 43 for all residents – a difference of 18 years.



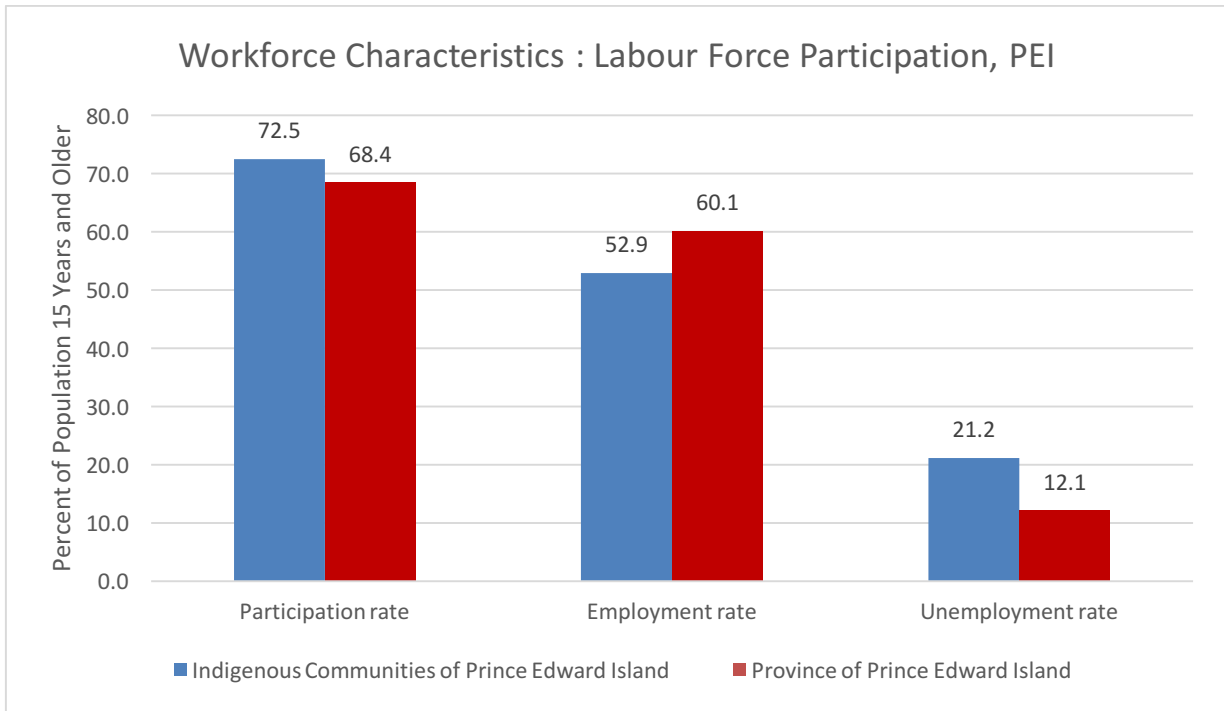
A review of the age distribution highlights the differences between the Indigenous and overall population of Prince Edward Island. The proportion of Indigenous people (39%) in the youth segment (0-19) is well above that of the overall population (24%). Just over half (58%) of Indigenous people fall within the 20 to 64 age group compared to 61% for the general population. The demographics highlight a considerable disparity in the 65+ segment. Considered in the context of the province as a whole (15%), there are relatively few (5%) Indigenous seniors.



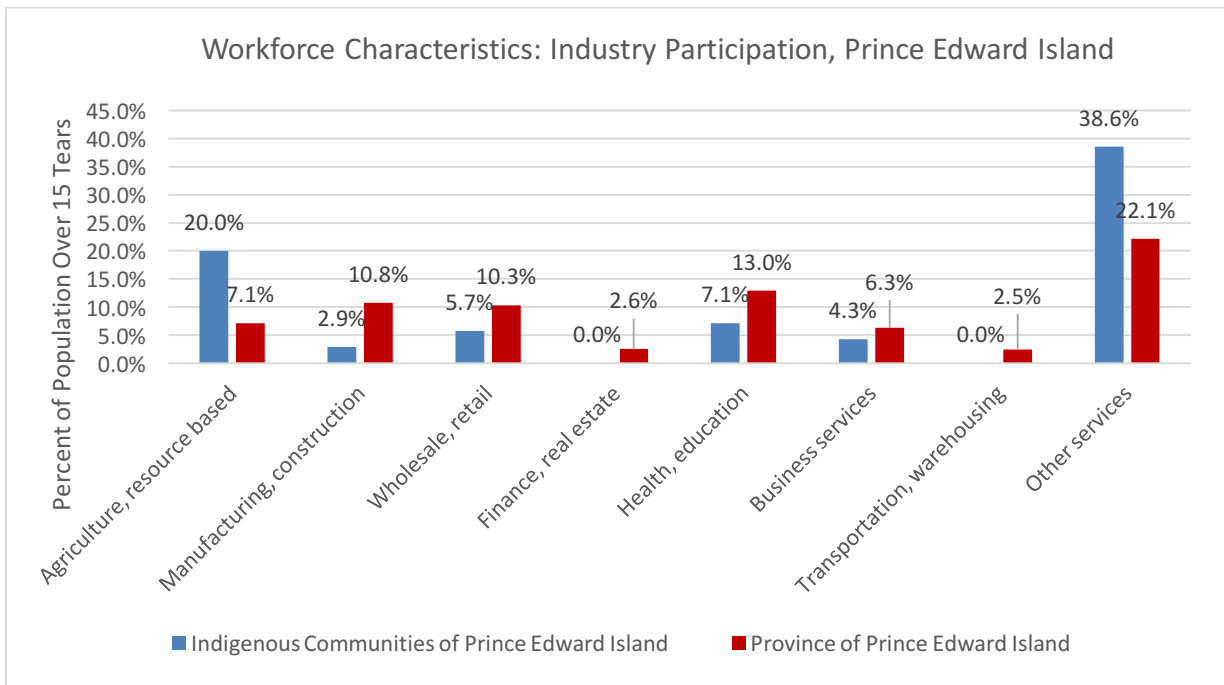
Indigenous residents in Prince Edward Island were slightly more mobile than the general population of the province. Nine in ten (89%) Prince Edward Island residents lived at the same address as compared to a year earlier. This compares to 87% for Indigenous (non-mover) residents within the province.



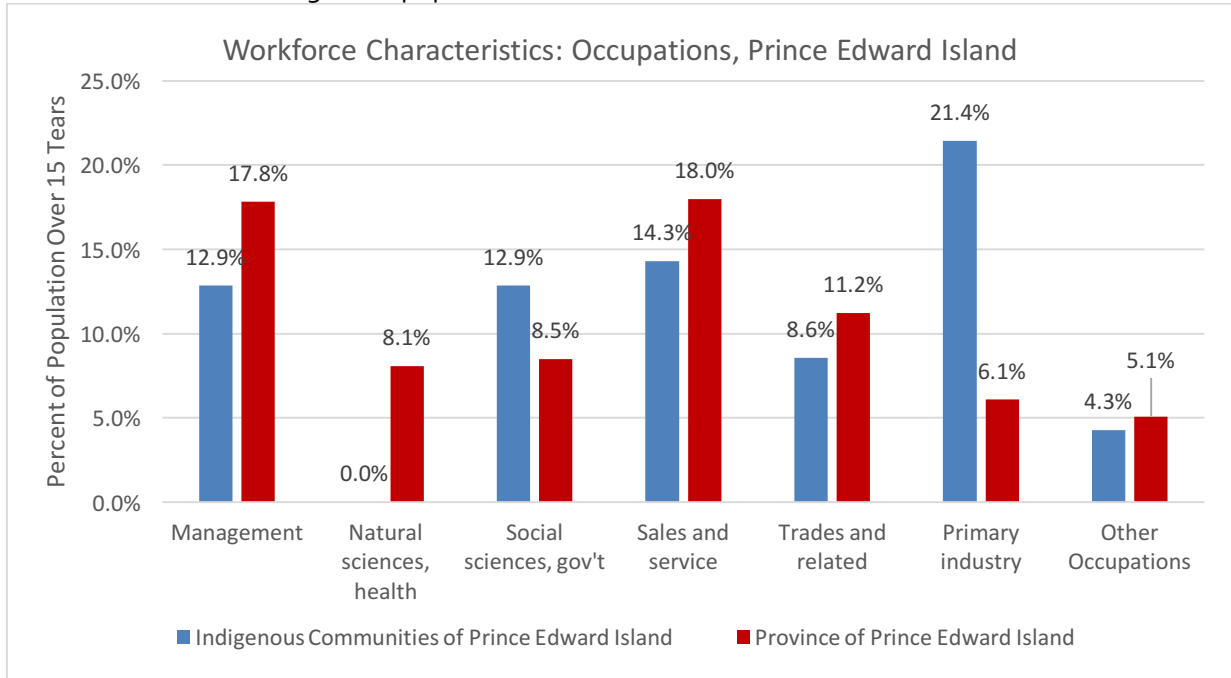
Educational attainment was generally lower for Prince Edward Island Indigenous people relative to the general population. One third (35%) of Indigenous people did not hold a degree, certificate or diploma compared to 26% of the overall population. One quarter (24%) of Indigenous people held a high school diploma relative to 23% of all Islanders. A similar proportion of Indigenous people (31%) received a trade or apprenticeship designation compared to the overall population (32%). The rate of university certification (3%) and degrees (6%) for Indigenous people was also lower than the provincial rate.



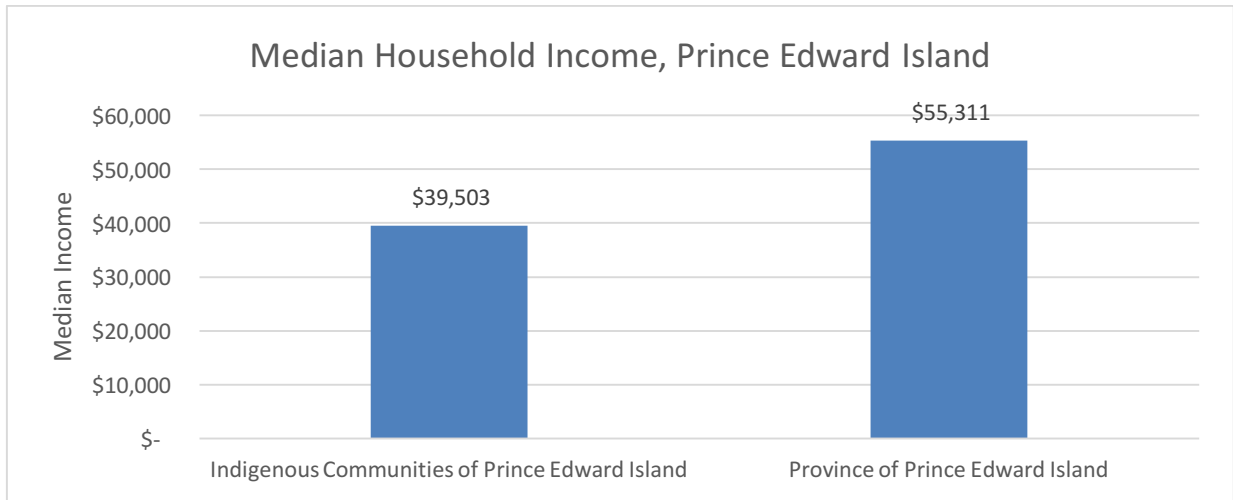
Labour force participation among Indigenous people (73%) in Prince Edward Island was somewhat higher than the overall provincial participation rate of 68% for the province. However, the Indigenous employment rate of 53% was lower than the provincial employment rate of 60%. Combined, these factors created a gap in the unemployment rate between Indigenous people and the general population. The Indigenous unemployment rate (21%) was notably higher than for the province as a whole (12%).



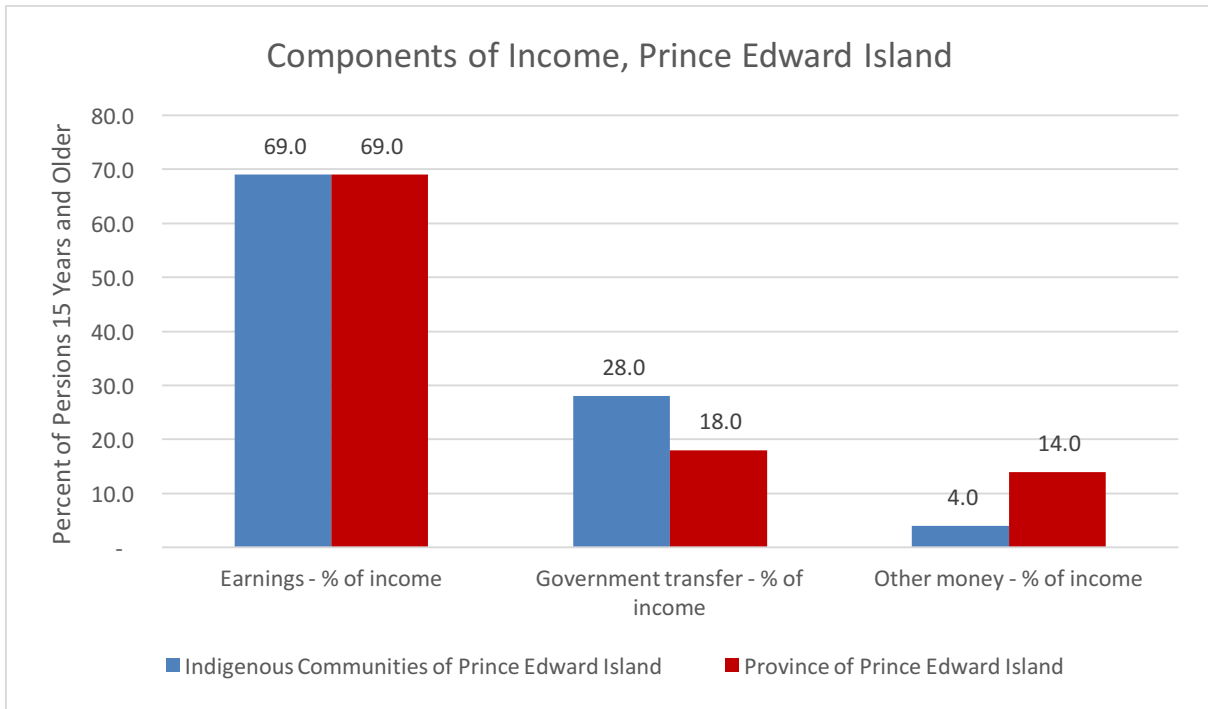
Prince Edward Island Indigenous people were most likely to work in the 'other services' sector. Four in ten (39%) of Indigenous people were employed in this category, compared to 22% for the general Prince Edward Island population. Another 20% of Indigenous people were employed in the agriculture/resource based sector, compared to 7% for the provincial population as a whole. Other areas of employment for Indigenous people included the health and education sector (7%), manufacturing/construction (3%), wholesale/retail (6%), and business services (4%). From a sector perspective, the relative frequency of employment among the overall provincial population exceeded that of the Indigenous population.



A workforce profile reveals dramatic differences in the occupational characteristics of the Indigenous and overall populations of Prince Edward Island. Indigenous people are much more likely (21%) to be employed in primary industry relative to the overall population (21% versus 6%) and sales and service (18 versus 14%). Conversely, Island residents are much more likely (8%) to be employed in the natural sciences and health occupations than are Indigenous people residents (0%). Other areas where Indigenous residents are under-represented include management (13% versus 18%), sales and service (14% versus 18%), and trade related occupations (11% versus 9%).



The median household income for the Indigenous communities of Prince Edward Island was \$39,503. This compares to a median household income of \$55,311 for the entire province. Indigenous household income was 29% lower than the provincial average.

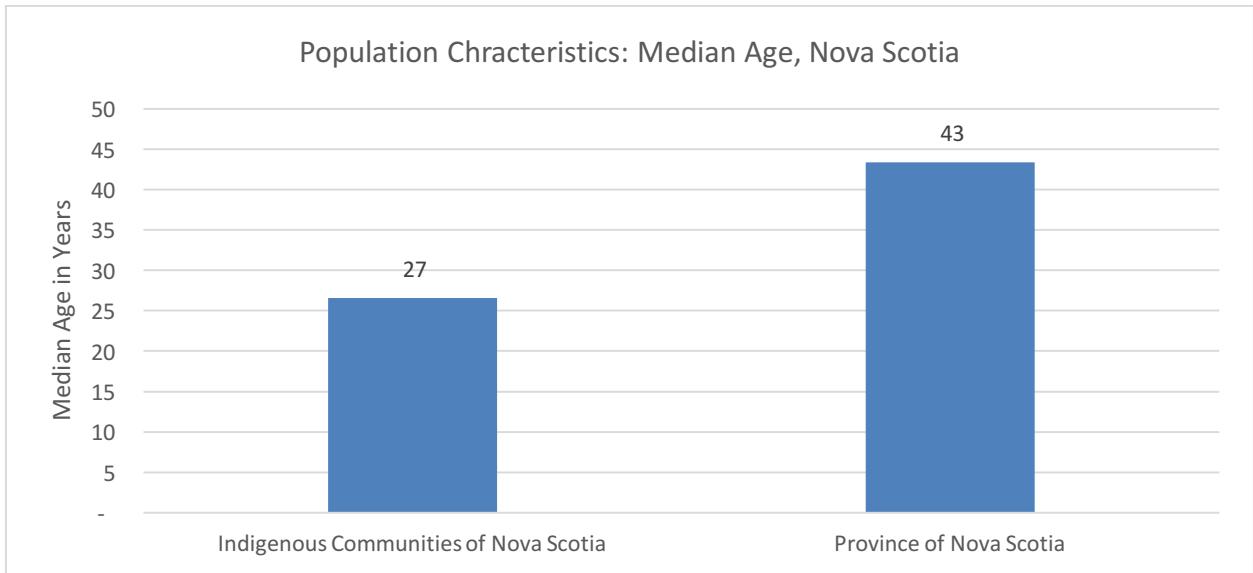


The percentage of income derived from earnings was 69% for both Indigenous people and the overall population of Prince Edward Island. The share of income from government transfers was higher for Indigenous people (28%) than for all other residents (18%). Conversely, the share of income from other sources for Indigenous people was relatively small (4%) compared to 14% for all Prince Edward Islanders.

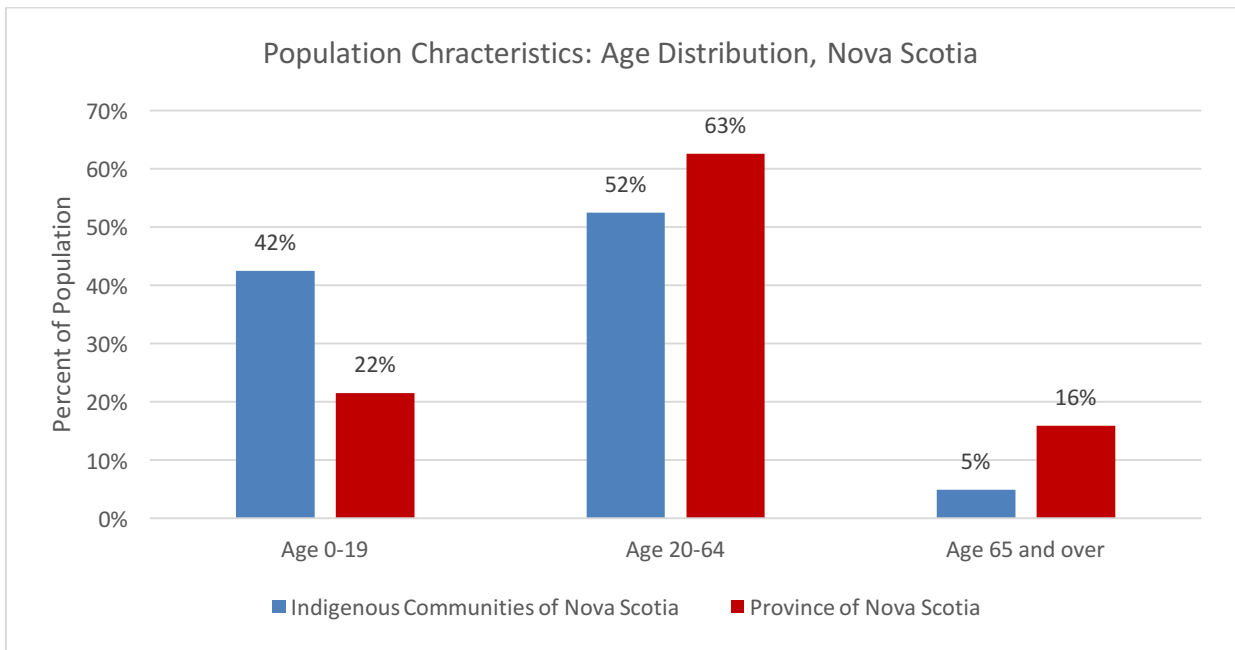
Social / Demographic Profile: Nova Scotia

	Acadia	Annapolis Valley	Bear River	Eskasoni	Glooscap First Nation	Membertou	Millbrook	Paqtnkek Mi'kmaq Nation	Pictou Landing	Potlotek First Nation	SIPEKNE'KATIK	Wagmatcook	Waycobah First Nation	Total NS
Registered Males On Own Reserve	106	65	46	1857	32	441	432	190	227	280	585	310	431	5002
Registered Females On Own Reserve	118	54	61	1887	62	443	433	215	245	270	665	306	440	5199
Registered Males On Other Reserves	2	0	0	15	0	19	23	10	11	16	35	20	14	165
Registered Females On Other Reserves	0	0	0	15	1	21	13	18	11	19	32	23	18	171
Registered Males On Own Crown Land	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Registered Females On Own Crown Land	0	0	0	0	0	0	1	0	0	0	0	0	1	2
Registered Males On Other Band Crown Land	0	0	0	1	0	0	1	0	0	0	1	0	0	3
Registered Females On Other Band Crown Land	0	0	0	0	0	0	1	0	0	0	0	0	0	1
Registered Males On No Band Crown Land	1	0	0	0	0	1	1	0	0	0	6	0	0	9
Registered Females On No Band Crown Land	2	0	0	0	0	2	0	0	0	0	6	0	0	10
Registered Males Off Reserve	625	69	112	286	136	273	430	59	79	62	599	77	35	2842
Registered Females Off Reserve	657	101	114	333	142	262	470	79	75	75	678	103	49	3138
Total Registered Population	1511	289	333	4394	373	1462	1805	571	648	722	2607	839	989	16543

The registered population of Indigenous communities in Nova Scotia totaled 16,543. This was almost evenly split between registered females (52%) and males (48%). The majority of both registered females (61%) and males (62%) were on own reserve. Most all the remaining females (37%) and males (35%) were off reserve. A relatively small segment of the registered population – 4% in total – was classified in the remaining categories - on other reserve, on no band crown land, on own crown land and other band crown land.

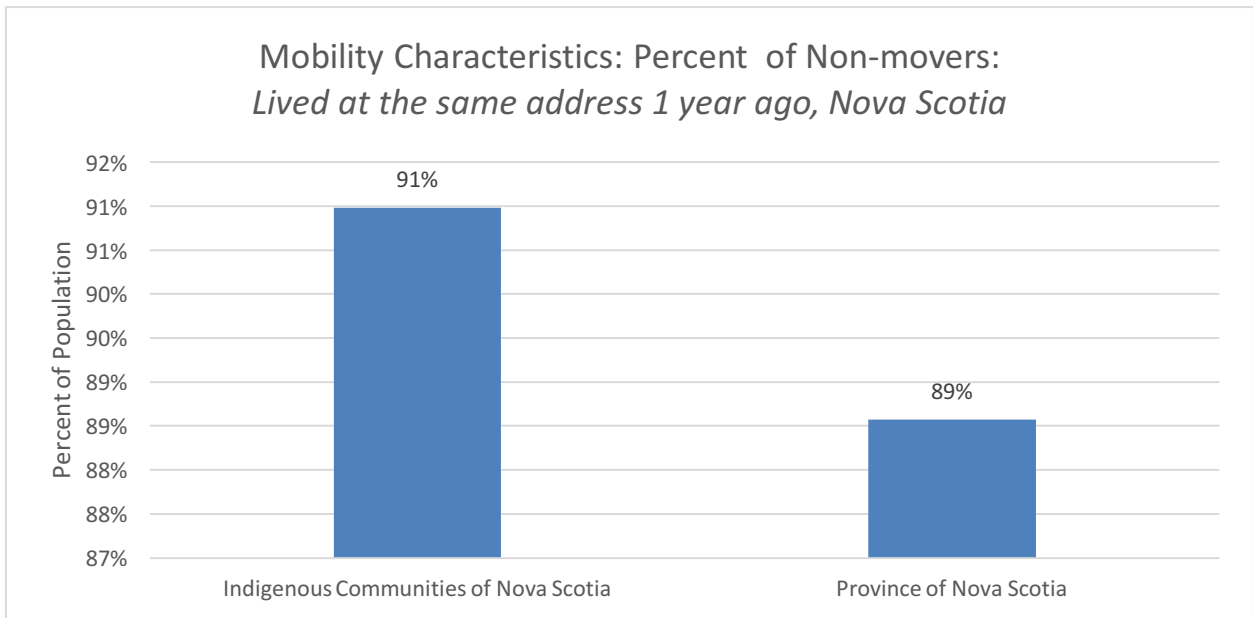


Indigenous people are considerably younger than the overall population of Nova Scotia. The median age for Indigenous people was 27, relative to 43 for all provincial residents – a difference of 16 years.

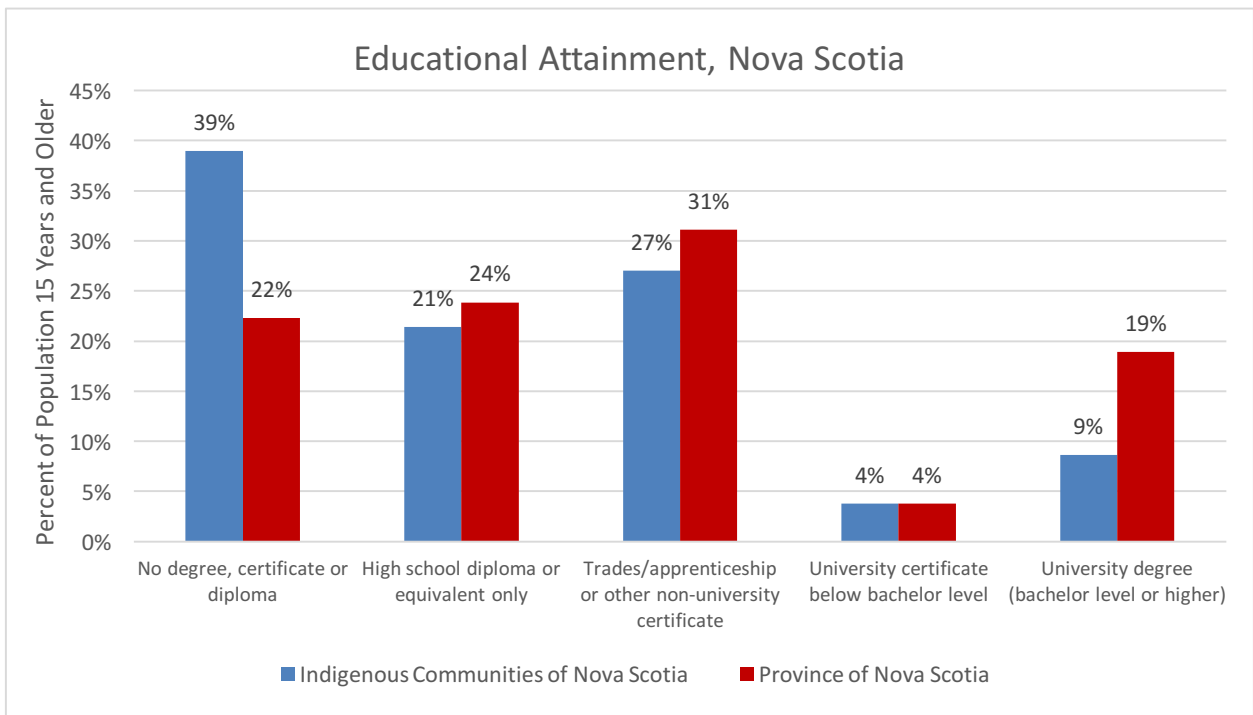


A review of the Nova Scotian age distribution highlights the differences between the Indigenous and overall populations of Nova Scotia. The share of Indigenous people (42%) in the youth segment (0-19) is nearly twice that of the overall population (22%). Just over half (52%) of Indigenous people fall in the 20-64 age group as compared to 63% for the general population. The

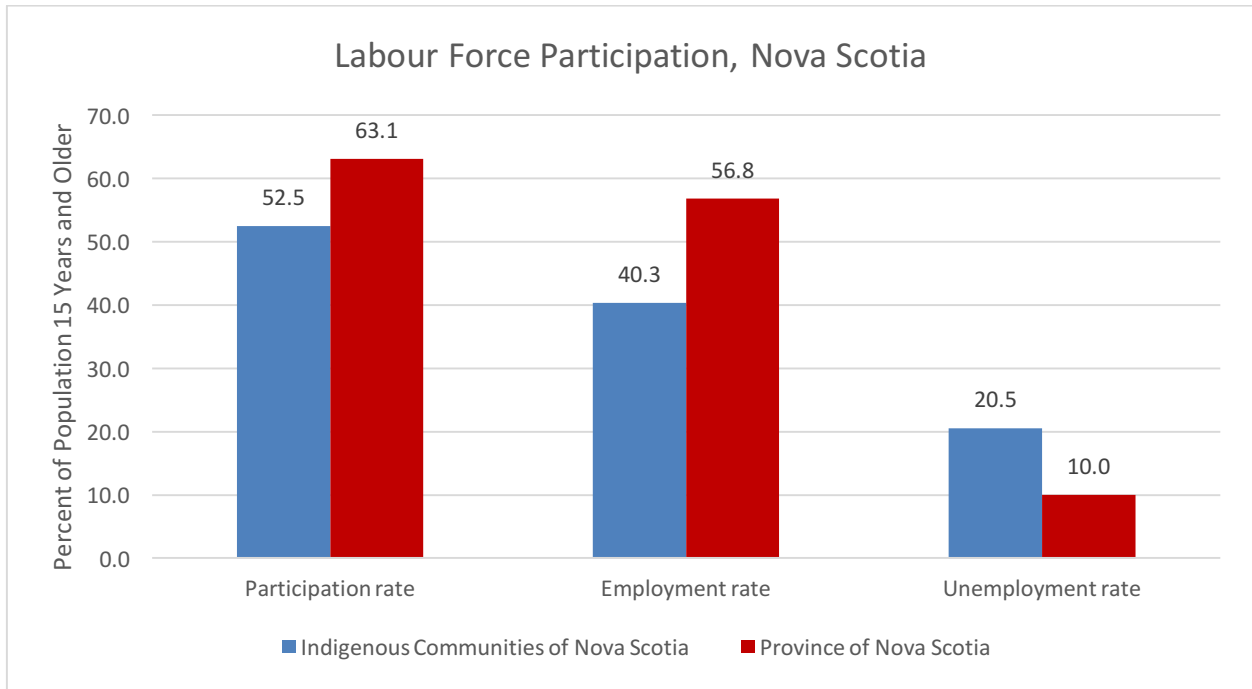
demographics highlight a considerable disparity in the 65+ segment. There are relatively few (5%) Indigenous seniors compared to the provincial percentage (16%).



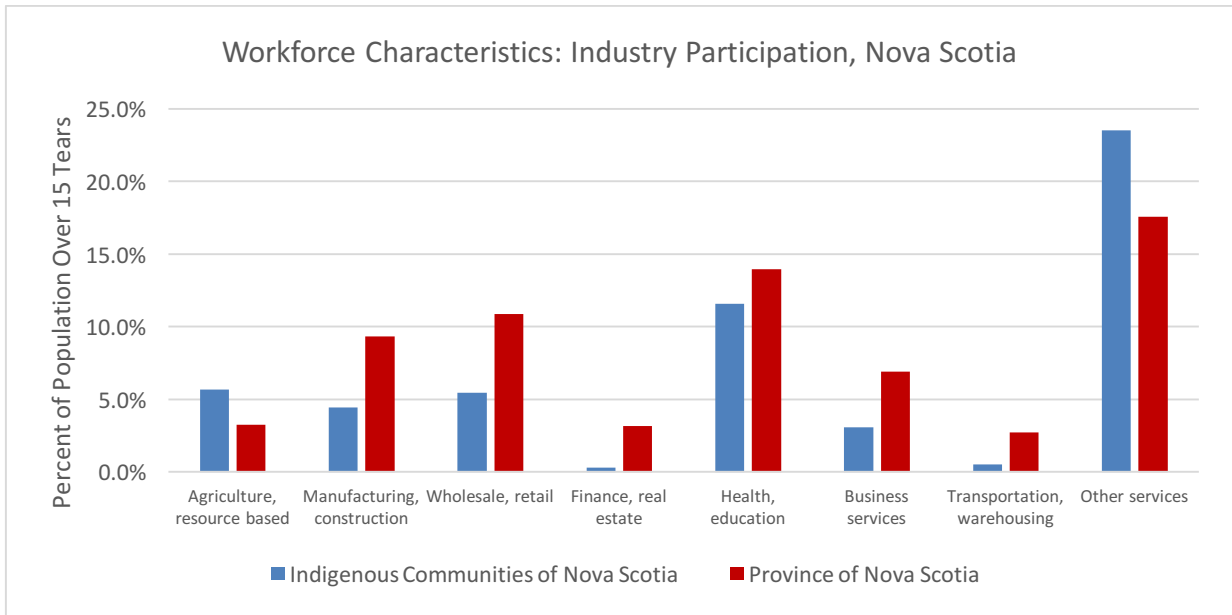
Indigenous residents in Nova Scotia were slightly more mobile than the general population of the province. Nine in ten (89%) Indigenous residents in the province lived at the same address as compared to a year earlier. This compares to 91% for all Nova Scotians.



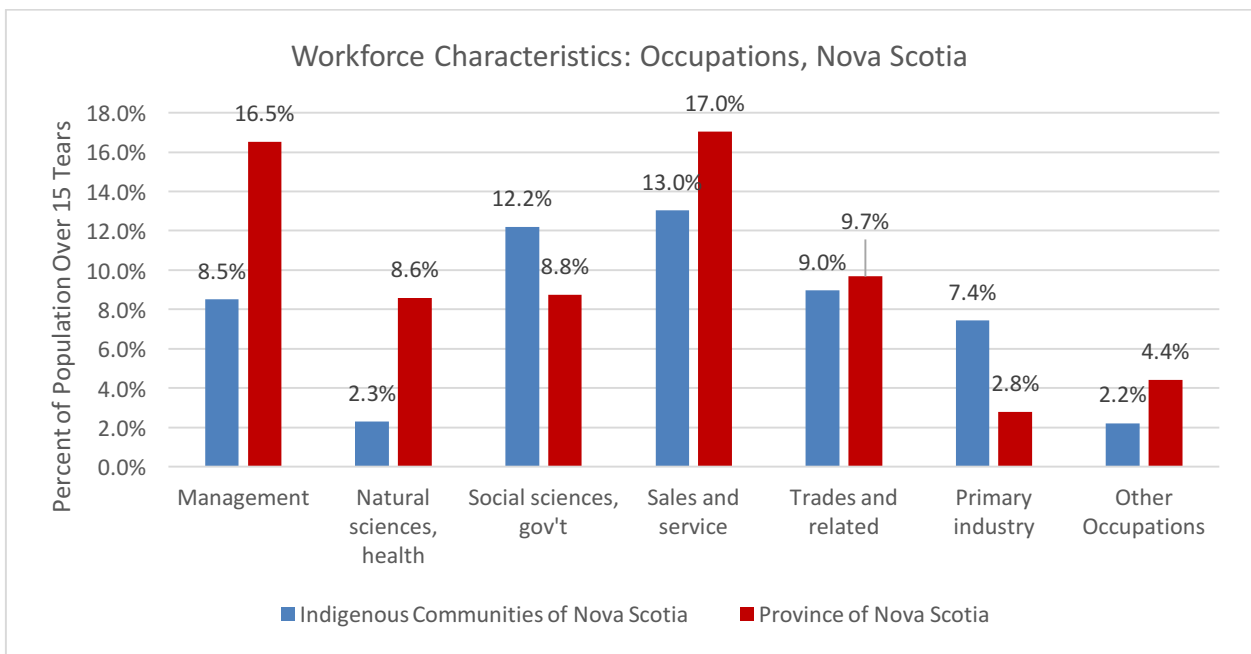
Educational attainment was generally lower for Nova Scotia Indigenous people relative to the general population. Two out of five (39%) of Indigenous people did not hold a degree, certificate or diploma compared to 22% of the overall population. Two in ten (21%) Indigenous people held a high school diploma relative to 23% of all Nova Scotians. Just over a quarter (27%) of Indigenous people received a trade or apprenticeship designation compared to 31% of the overall population. The rate of university certification (4%) was in line with the provincial average, whereas the attainment of university degrees (9%) was less prevalent among Indigenous people.



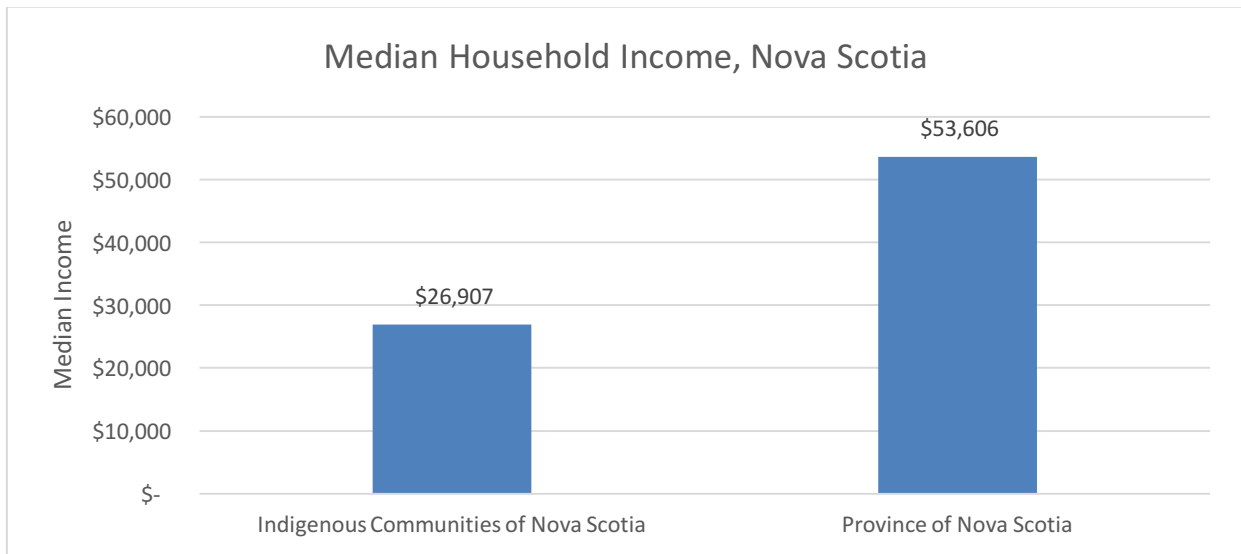
Labour force participation among Indigenous people (53%) in Nova Scotia was about ten percent less than the overall provincial participation rate of 63% for the province. The employment rate of 40% for Indigenous people was considerably lower than the provincial employment rate of 57%. There was a sizable gap in the unemployment rate between Indigenous people and the general population. The Indigenous unemployment rate (21%) was twice the overall provincial rate (10%).



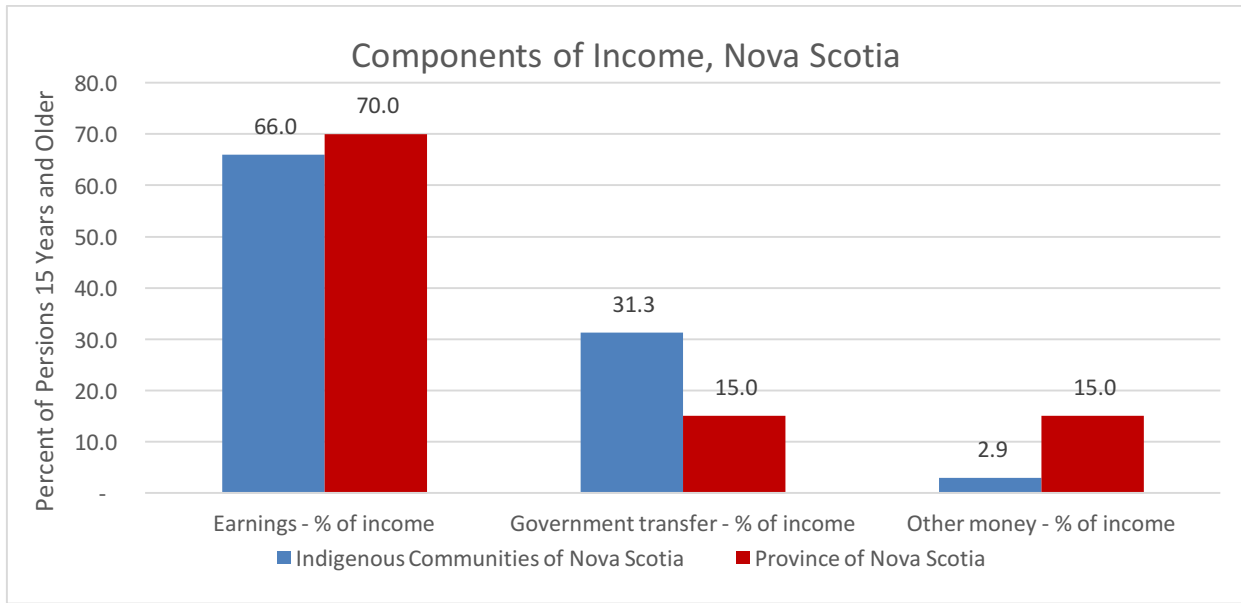
Nova Scotia Indigenous people were most likely to work in the 'other services' sector. One quarter (24%) of Indigenous people in the province were employed in this category, compared to 18% for the general population. Employment of Indigenous people was lower than the general population in most other industries including the health and education sector (12%), manufacturing/construction (4%), wholesale/retail (5%), business services (3%), and transportation/warehousing (1%). An exception was the agriculture and resource based industry, where the relative frequency of employment among the Indigenous population (6%) exceeded that of the overall provincial population (3%).



A workforce profile reveals striking differences in the occupational characteristics of the Indigenous and overall populations of Nova Scotia. For example, Indigenous employment is considerably lower in the management sector (9%); in natural sciences and health (2%) and in the sales and service (13%) occupations relative to the overall population. In contrast, Indigenous employment was higher in social sciences and government (12%) and primary industry (7%). At just under 10%, employment in the trade related occupations was comparable among both populations.

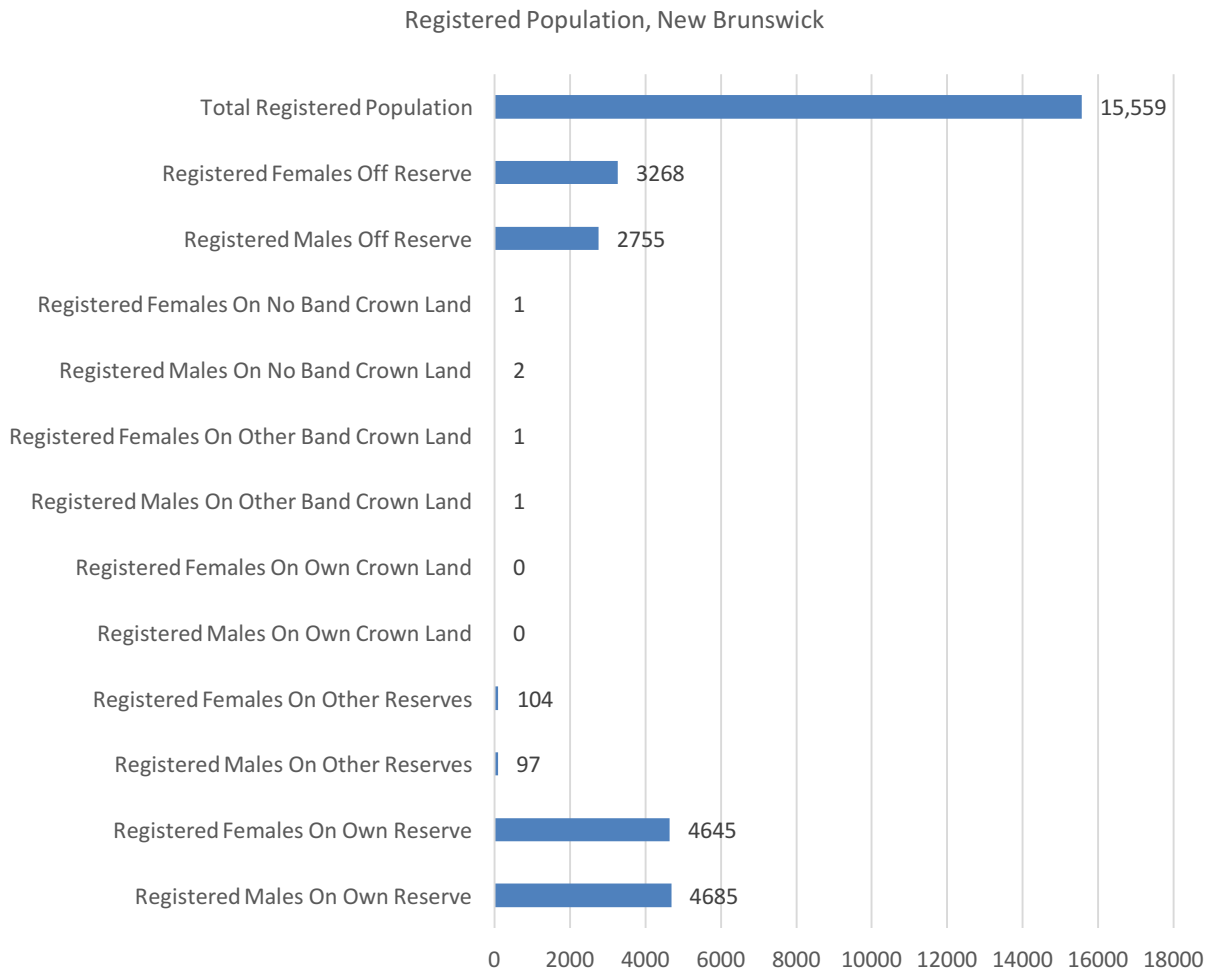


The median household income for the Indigenous communities of Nova Scotia of \$26,907 was well below the provincial average. Indigenous incomes were about half of the median household income of \$53,606 for the entire province.

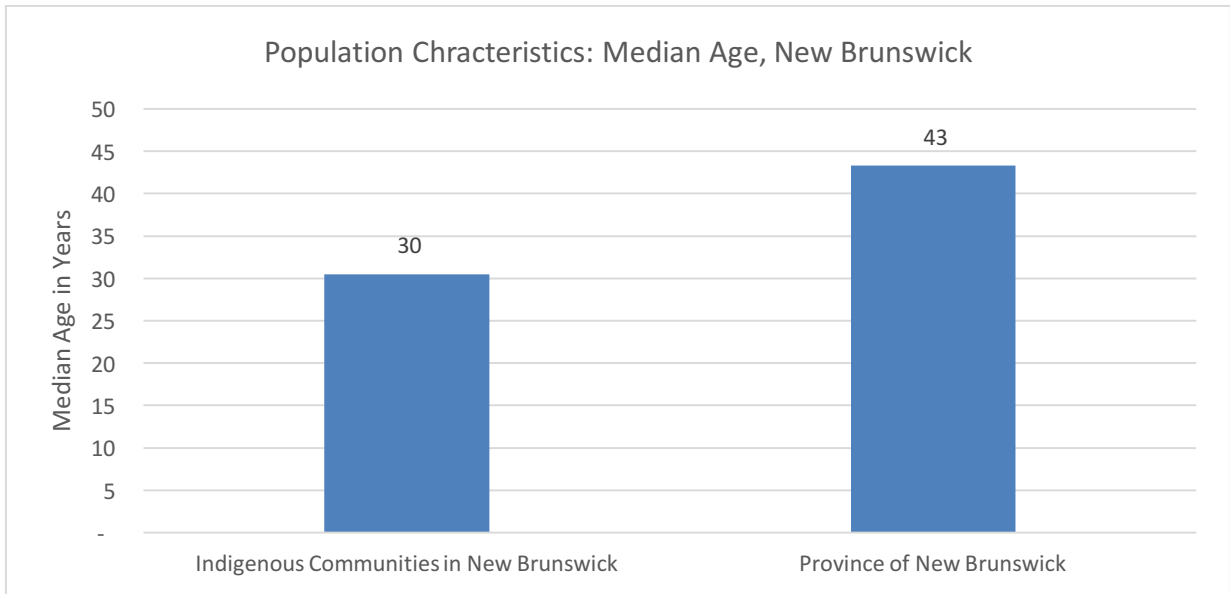


The percentage of income derived from earnings was three percentage points lower for Indigenous people (66%) than for the overall population of Nova Scotia (70%). In comparison, the share of income from government transfers was higher for Indigenous people (20%) relative to all Nova Scotia residents (15%). In addition, the share of income from other sources for Indigenous people was negligible (3%) compared to 15 % for all of Nova Scotia.

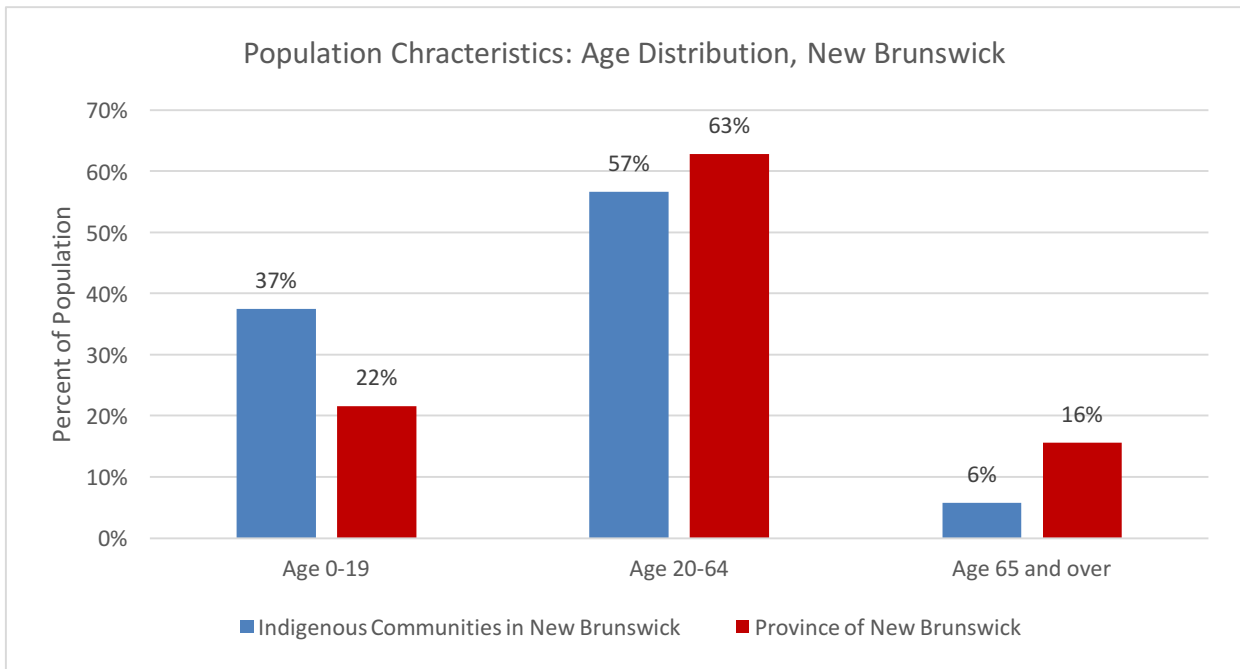
Social / Demographic Profile: New Brunswick



The registered population of Indigenous communities in New Brunswick totaled 15,559. This was almost evenly split between registered females (52%) and males (48%). The majority of both registered females (58%) and males (62%) were on own reserve. Virtually all of the remaining females (41%) and males (37%) were off reserve. A relatively small segment of the registered population – 2% in total – was classified in the remaining categories - on other reserve, on no band crown land, own crown land and other band crown land.

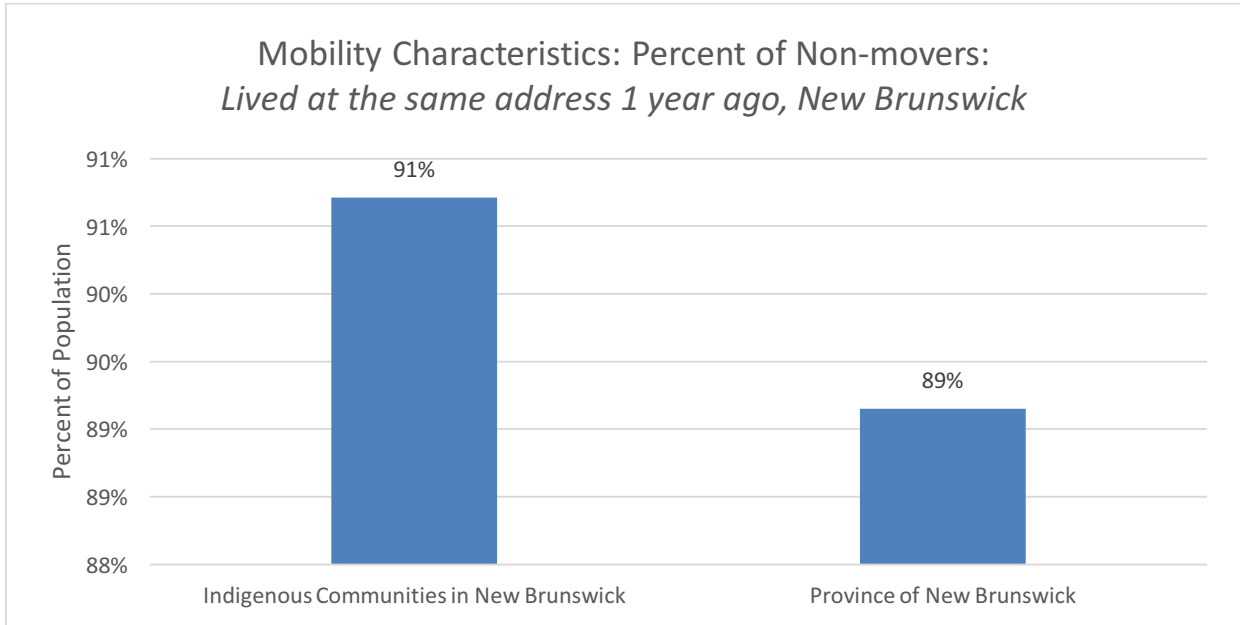


Within New Brunswick, Indigenous people are considerably younger than the overall population. The median age for Indigenous people was 30, relative to 43 for all residents – a difference of 13 years.

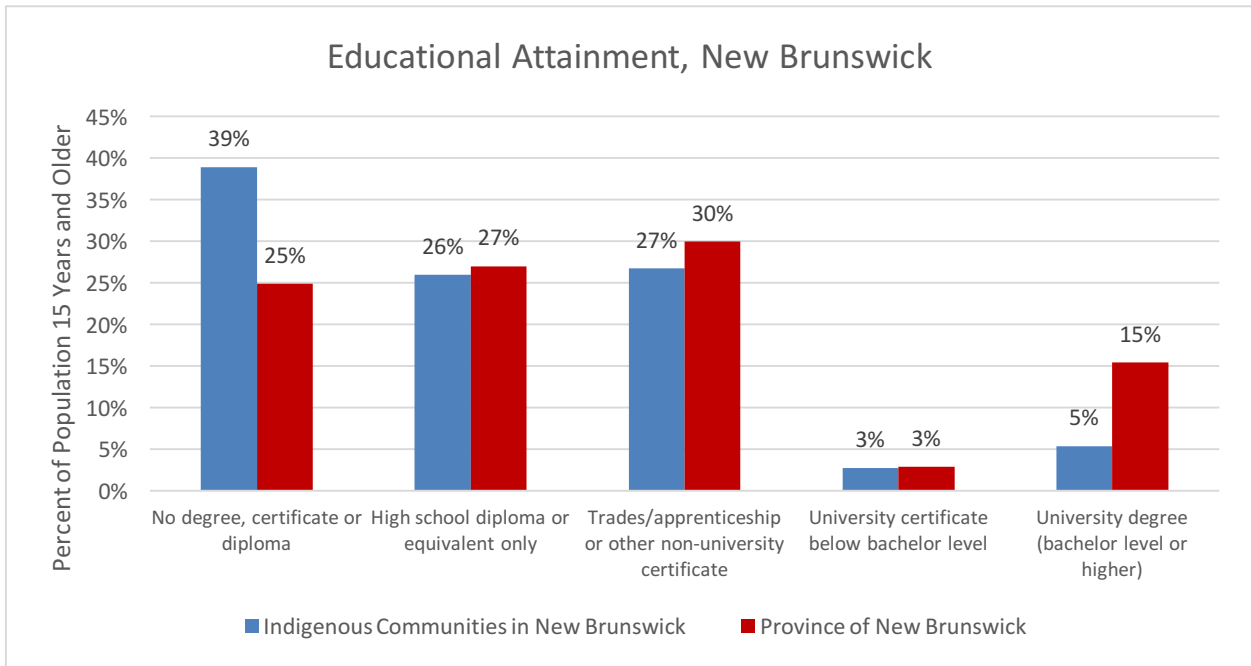


A review of the age distribution highlights the differences between the Indigenous and overall populations of New Brunswick. The share of Indigenous people (37%) in the youth segment (0-19) is considerably higher than that of the overall population (22%). Just over half (57%) of Indigenous people fall in the 20-64 age group compared to 63% for the general population. The

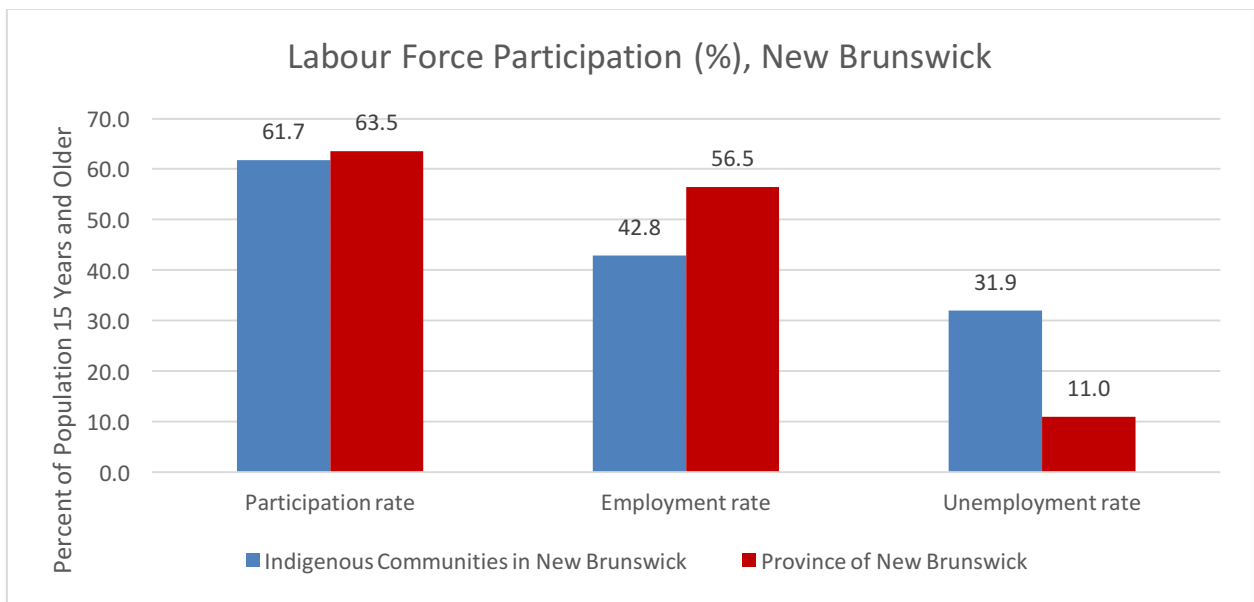
demographics highlight a considerable difference in the 65+ segment. The proportion of Indigenous seniors (6%) is much less than in the province as a whole (16%).



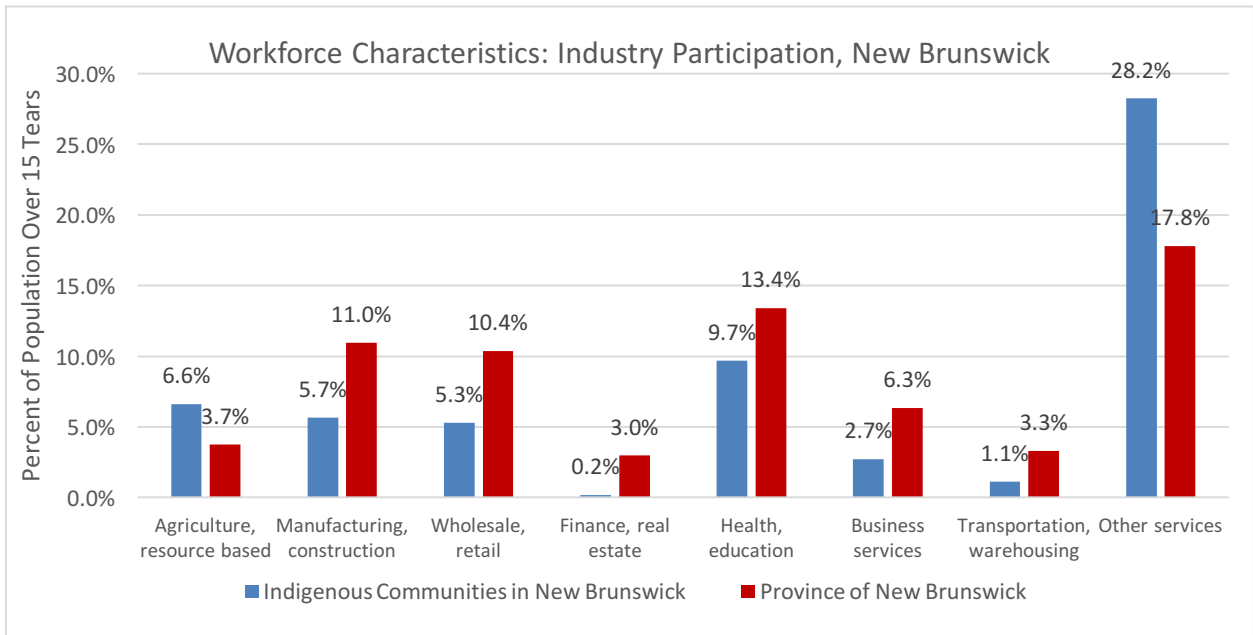
Indigenous residents in New Brunswick were slightly less mobile than the general population of the province. Nine in ten (91%) Indigenous residents lived at the same address relative to a year earlier. This compares to 89% for all New Brunswick residents in the province.



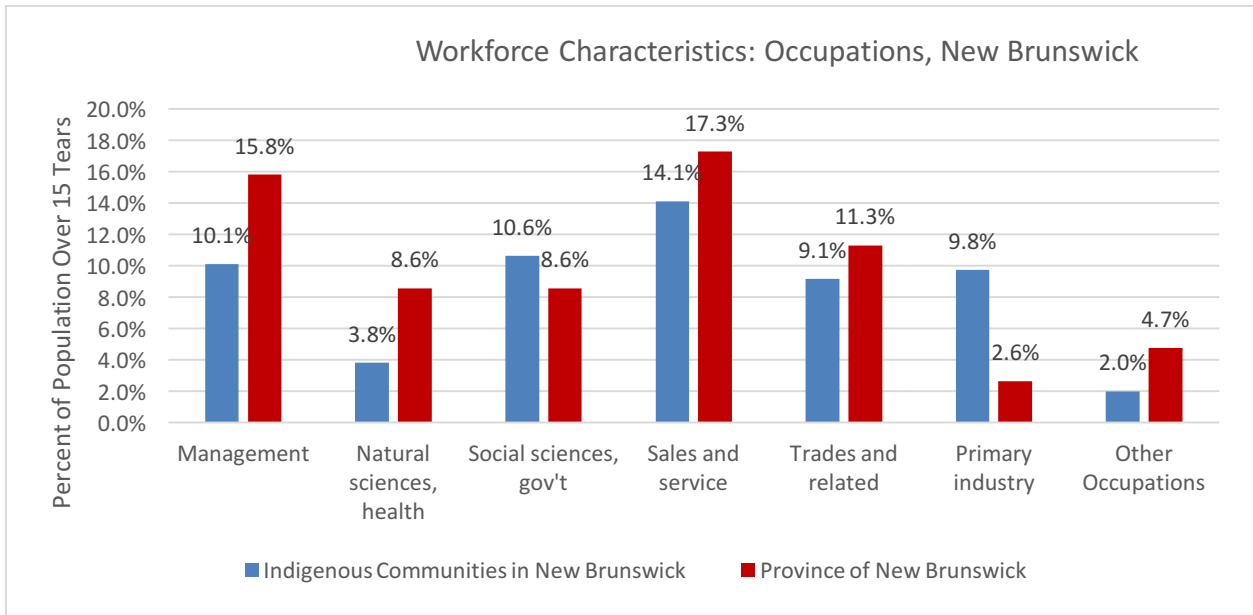
Educational attainment was generally lower for New Brunswick’s Indigenous people relative to the general population. Four in ten (39%) of Indigenous people did not hold a degree, certificate or diploma compared to 25% of the overall population. The high school diploma rate (26%) was comparable to that of the general population (27%). Just over a quarter (27%) of Indigenous people received a trade or apprenticeship designation compared to 30% of the overall population. The rate of university certification (3%) matched the provincial average, whereas university degrees were much less prevalent amongst Indigenous people (5%) compared to the provincial rate (15%).



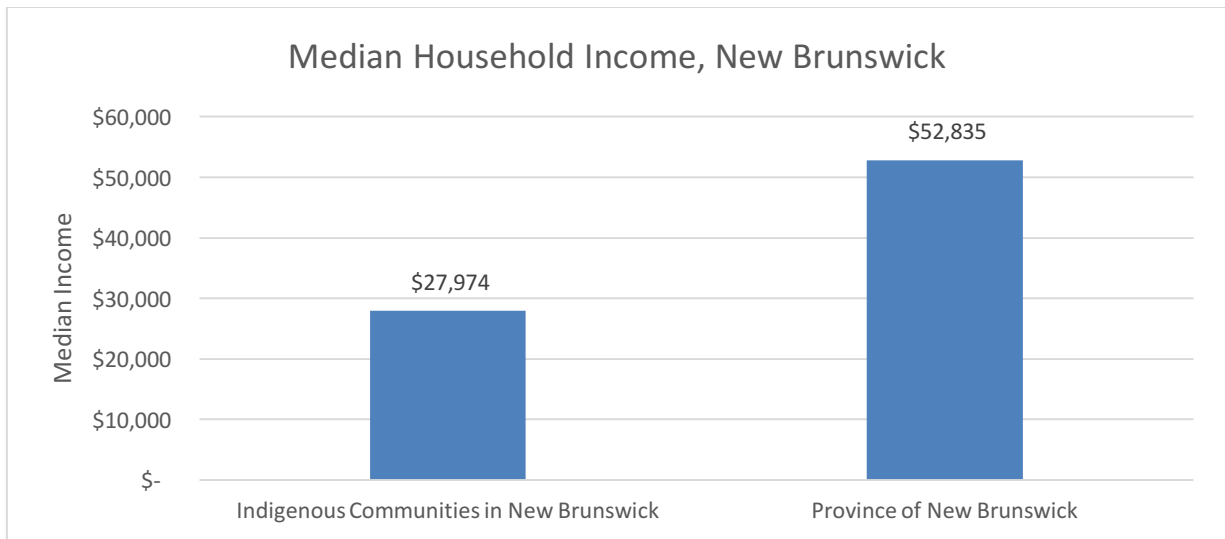
Labour force participation in New Brunswick among Indigenous people (62%) was slightly less than the overall population (64%). However, the Indigenous employment rate of 43% was lower than the provincial employment rate of 57%. Combined, these factors created a sizable gap in the unemployment rate between Indigenous people and the general population. The Indigenous unemployment rate (32%) was nearly triple that of the province of New Brunswick as a whole (11%).



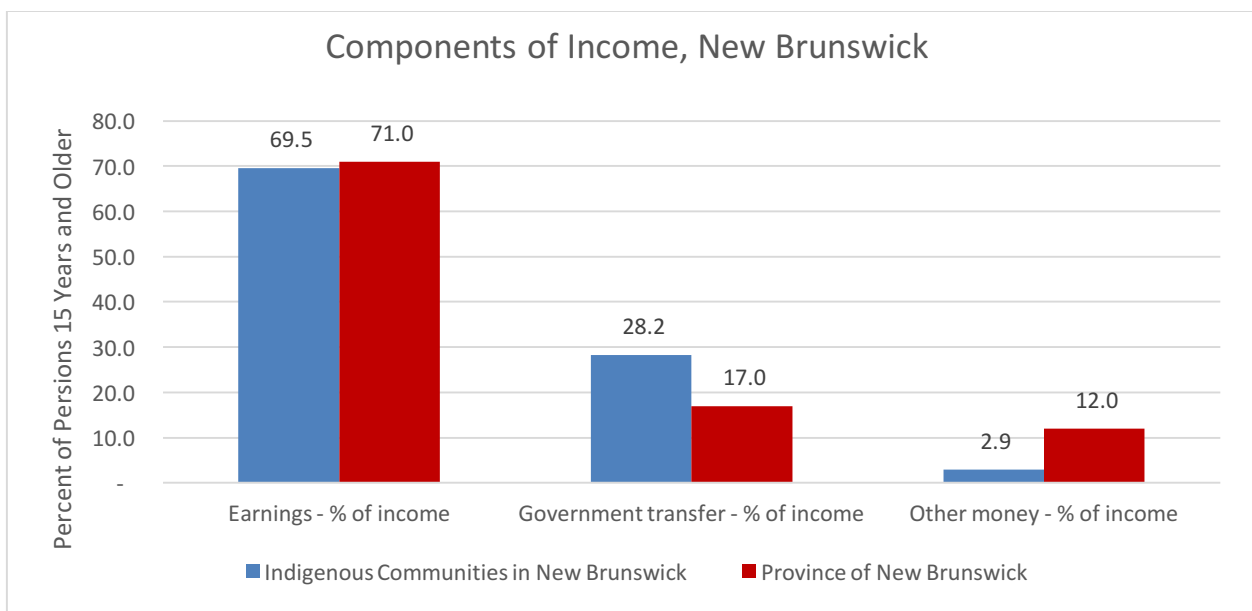
New Brunswick Indigenous people were most likely to work in the 'other services' sector. Three in ten (28%) Indigenous people in the province were employed in this category, compared to 18% for the general population. The only other category wherein Indigenous employment exceeded the overall population was agriculture/resource based (7%). The relative frequency of employment among the overall provincial population exceeded that of the Indigenous population for the remaining industries including: health and education sector (8%), manufacturing/construction (6%), wholesale/retail (5%), business services (3%) and transportation/warehousing (1%).



A workforce profile reveals notable differences in the occupational characteristics of the Indigenous and overall populations of New Brunswick. For example, relative to the overall population, Indigenous employment is lower in the management (10%), natural sciences and health (4%) sectors, in trade related occupations (9%) and in the sales and service (14%) occupations. Alternatively, Indigenous employment was higher in social sciences and government (11%) and primary industry (10%). The greatest contrast was in primary industry, wherein the share of Indigenous employment was three times the overall population.



The median household income for the Indigenous communities of New Brunswick was \$27,974. This compares to a median household income of \$52,835 for the entire province. Indigenous household incomes were 47% lower than the provincial average.



The percentage of income derived from earnings was comparable for Indigenous people (70%) and the overall population of New Brunswick (71%). The share of income from government transfers was higher for Indigenous people (28%) relative to all residents (17%). On the other hand, the share of income from other sources for Indigenous people was negligible (3%) compared to 12% for all of New Brunswick.

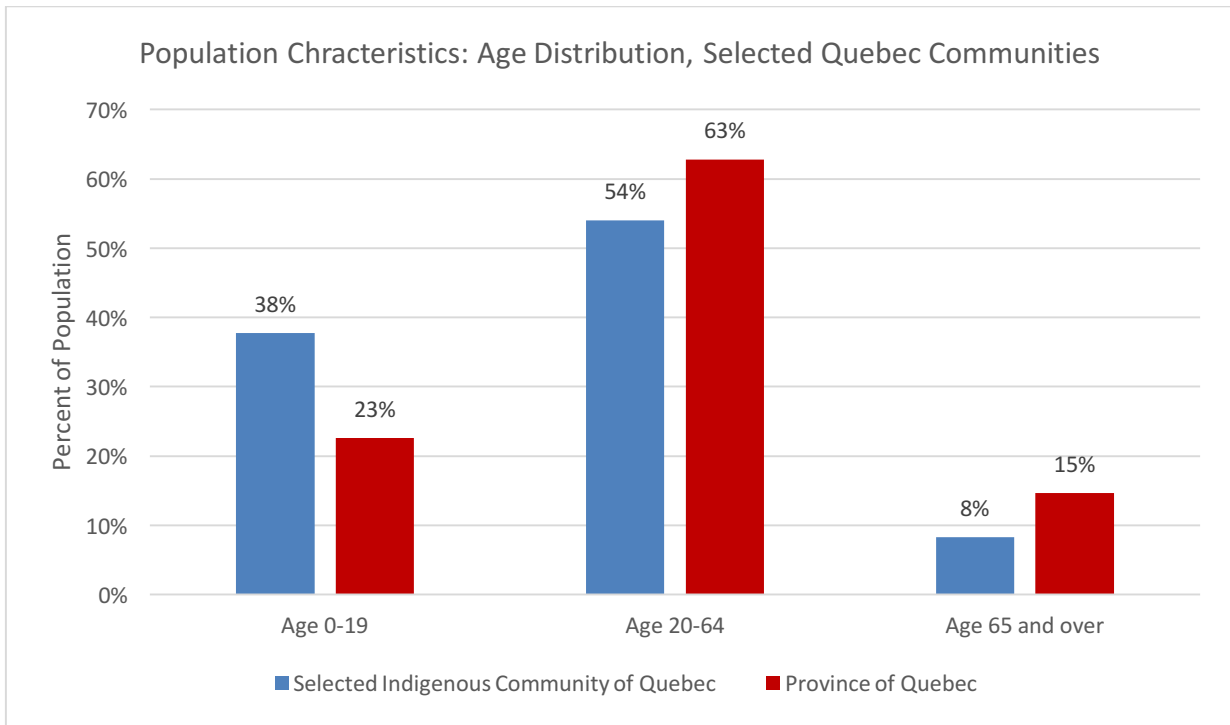
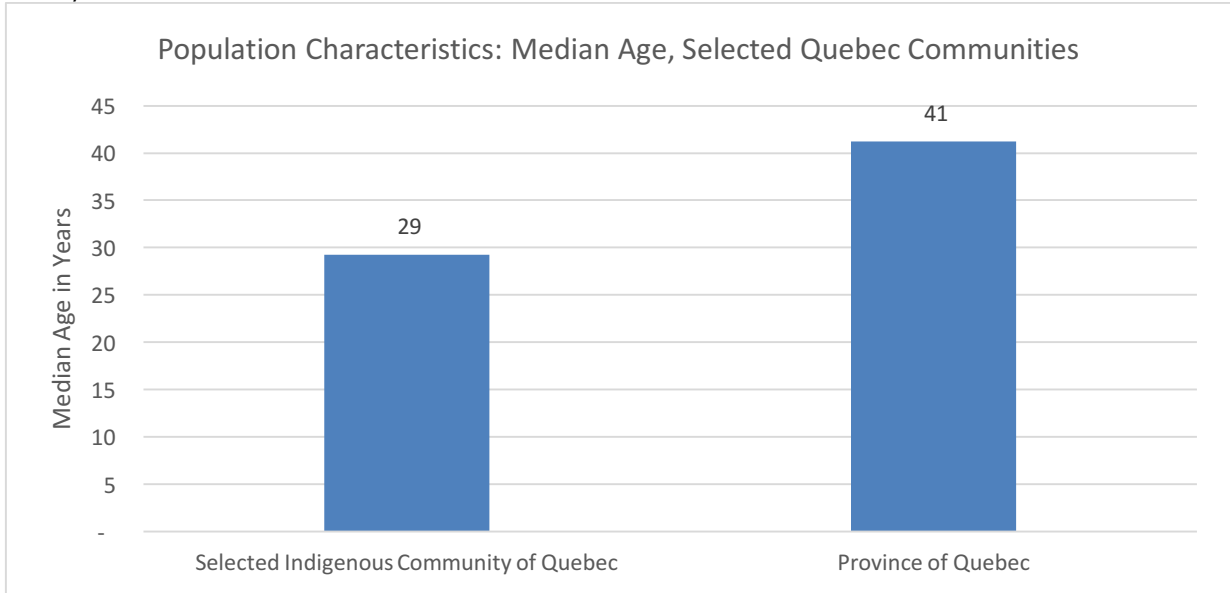
Social / Demographic Profile: Quebec - Selected Communities

	La Nation Micmac de Gespeg	Listuguj Mi'gmaq Government	Micmacs of Gesgapegiag	Première Nation Malecite de Viger	Total
Registered Males On Own Reserve	0	1052	355	0	1407
Registered Females On Own Reserve	0	1005	322	0	1327
Registered Males On Other Reserves	0	15	8	1	24
Registered Females On Other Reserves	0	15	10	0	25
Registered Males On Own Crown Land	0	0	0	0	0
Registered Females On Own Crown Land	0	0	0	0	0
Registered Males On Other Band Crown Land	0	0	0	0	0
Registered Females On Other Band Crown Land	0	0	0	0	0
Registered Males On No Band Crown Land	0	0	0	0	0
Registered Females On No Band Crown Land	0	0	0	0	0
Registered Males Off Reserve	367	852	365	564	2148
Registered Females Off Reserve	387	1052	432	607	2478
Total Registered Population	754	3991	1492	1172	7409

The registered population of Indigenous communities in Quebec totaled 7,409. This was almost evenly split between registered females (52%) and males (48%). The majority of both registered females (65%) and males (60%) were residing off reserve. Virtually all of the remaining females (35%) and males (39%) were on own reserve. A very small segment (1%) of the registered population was on other reserve.

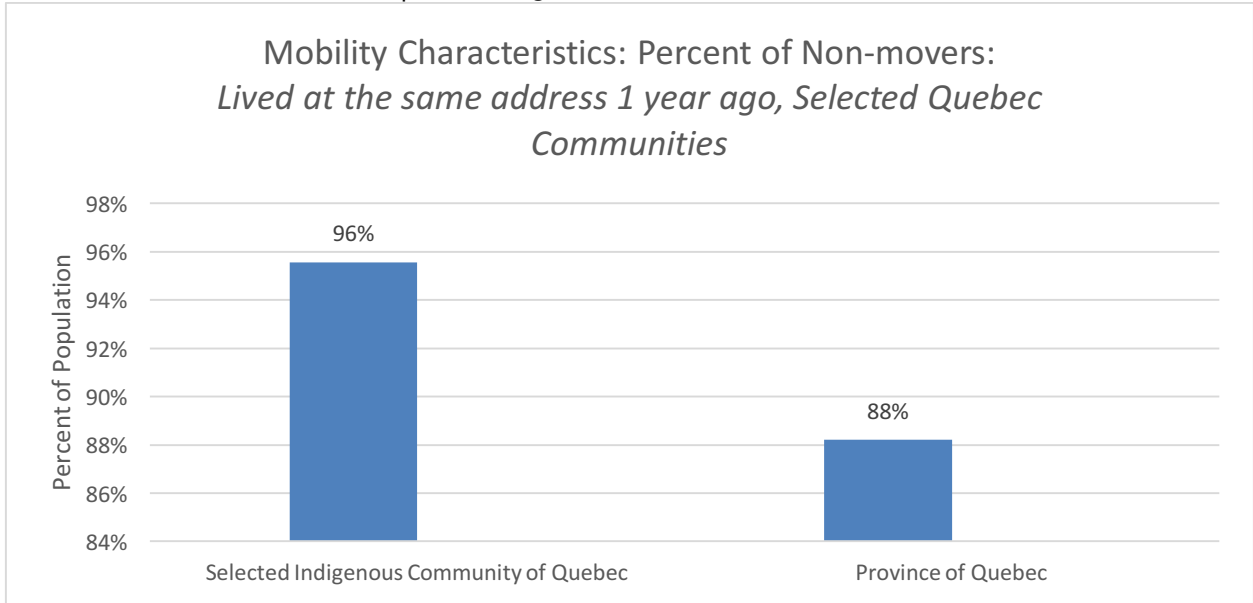
Indigenous people in Quebec are considerably younger than the province's overall population.

The median age for Indigenous people was 29, relative to 41 for all other residents – a difference of 12 years.

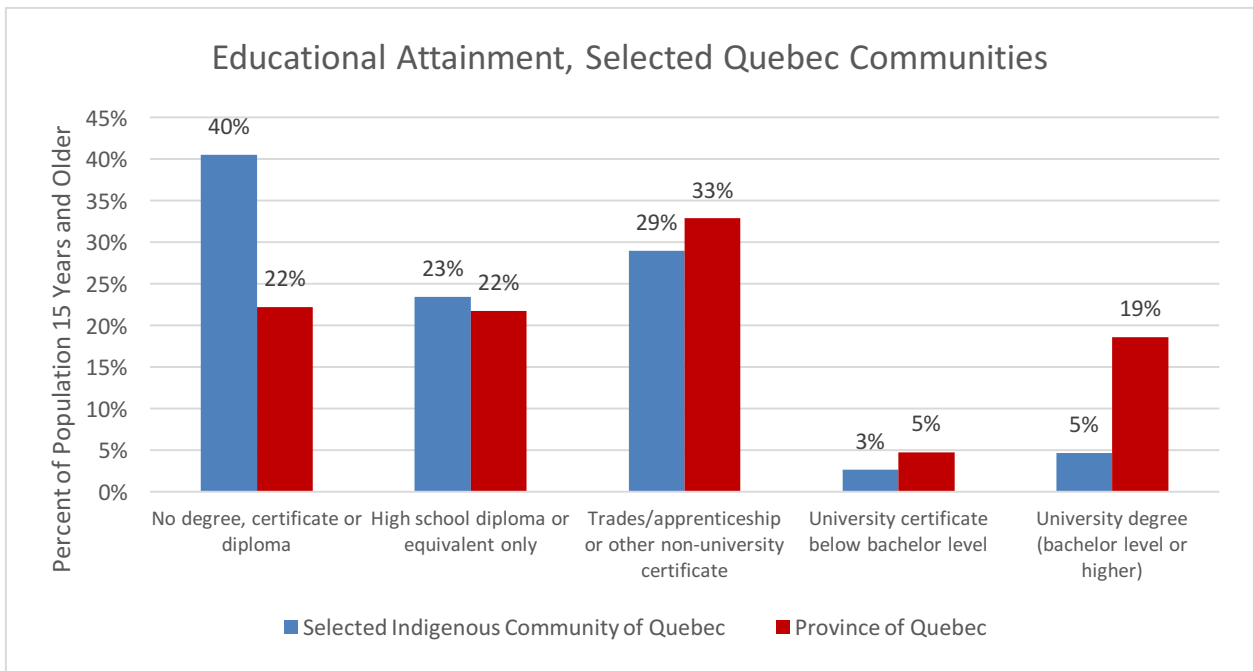


A review of the age distribution highlights the differences between the Indigenous and overall population of Quebec. The share of Indigenous people (38%) in the youth segment (0-19) is much higher than that of the overall population (23%). Just over half (54%) of Indigenous people fall within the 20-64 age group, compared to 63% for the general population. The demographics

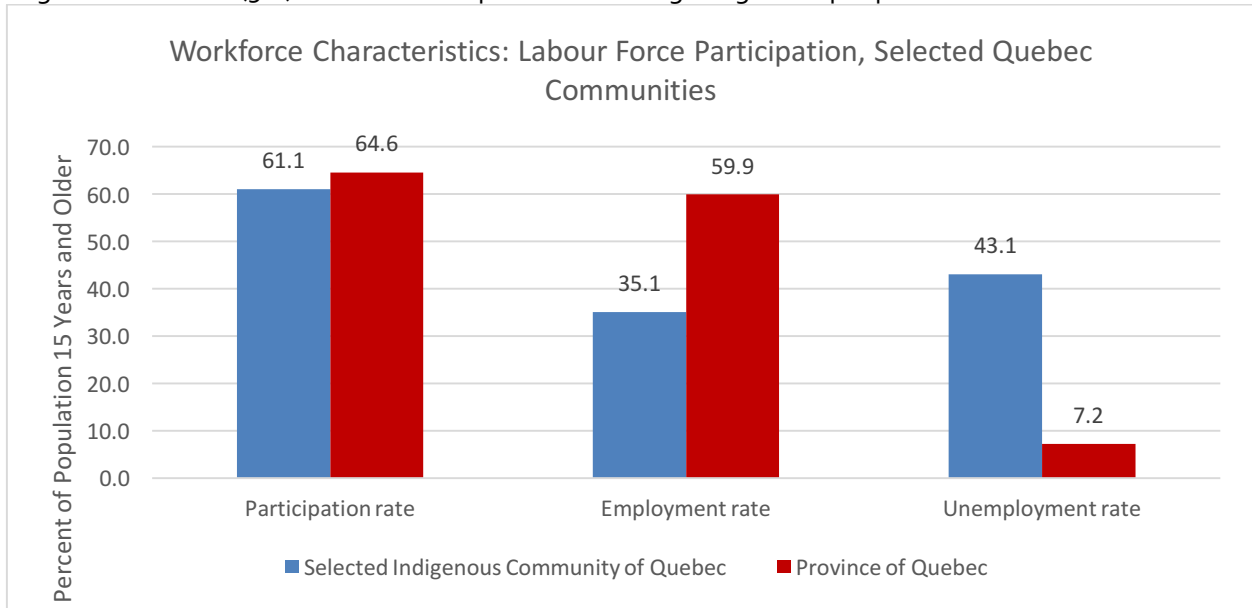
highlight a considerable difference in the 65+ segment. The incidence of Indigenous seniors (8%) is about half of that of the entire province (15%).



Indigenous residents of Quebec were less mobile than the general population of the province. Compared to a year earlier, nineteen of twenty (96%) Quebec’s Indigenous people resided at the same address. This compares to 88% for Quebec overall.



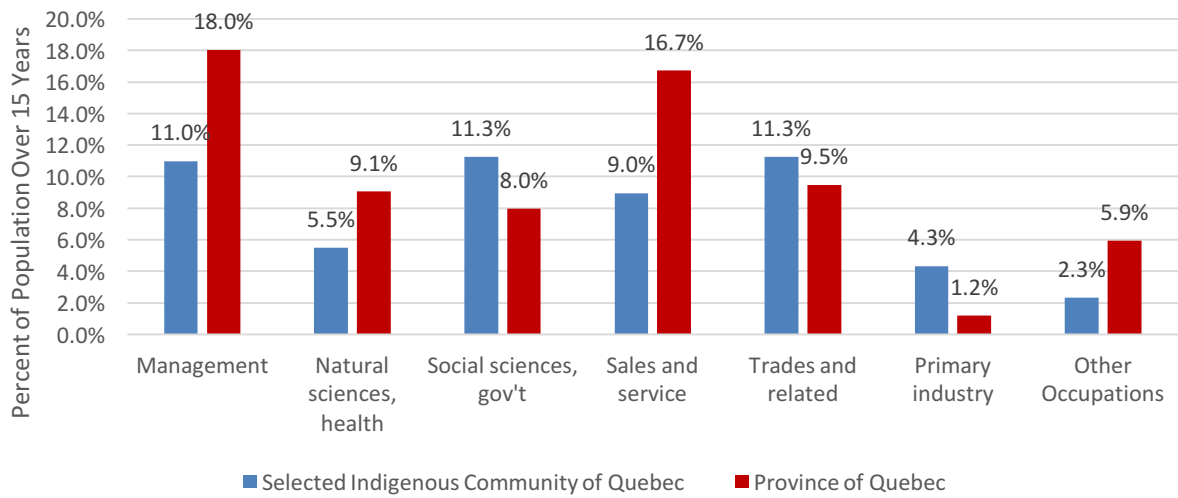
Educational attainment was generally lower for Quebec Indigenous people relative to the general population. Four in ten (40%) of Indigenous people did not hold a post-secondary degree, certificate or diploma compared to 22% of the overall population. The high school diploma rate was comparable (22% versus 23%) for both groups. Three in ten (29%) Indigenous people received a trade or apprenticeship designation compared to 33% of the overall population. The rate of university certification (3%) was slightly below the provincial average, whereas university degree attainment (5%) was much less prevalent among Indigenous people.



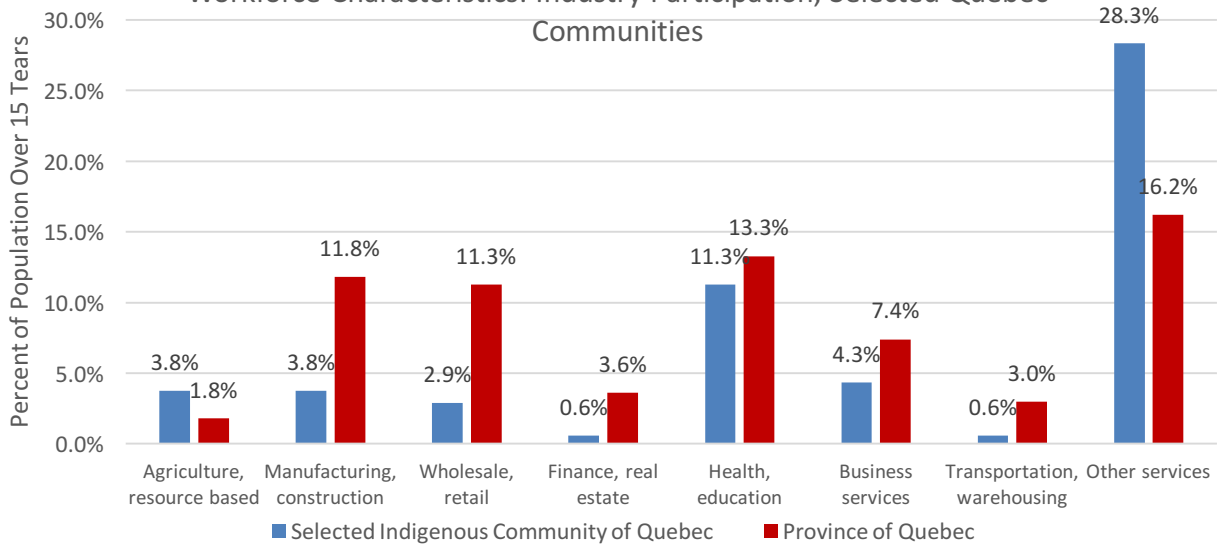
Labour force participation among Indigenous people (61%) in Quebec was somewhat lower than the overall provincial participation rate of 65%. The employment rate of 35% for Indigenous people was considerably lower than the provincial employment rate of 60%. There was a dramatic difference in the unemployment rate between Indigenous people and the general population. The Indigenous unemployment rate (43%) greatly exceeded that for province as a whole (7%).

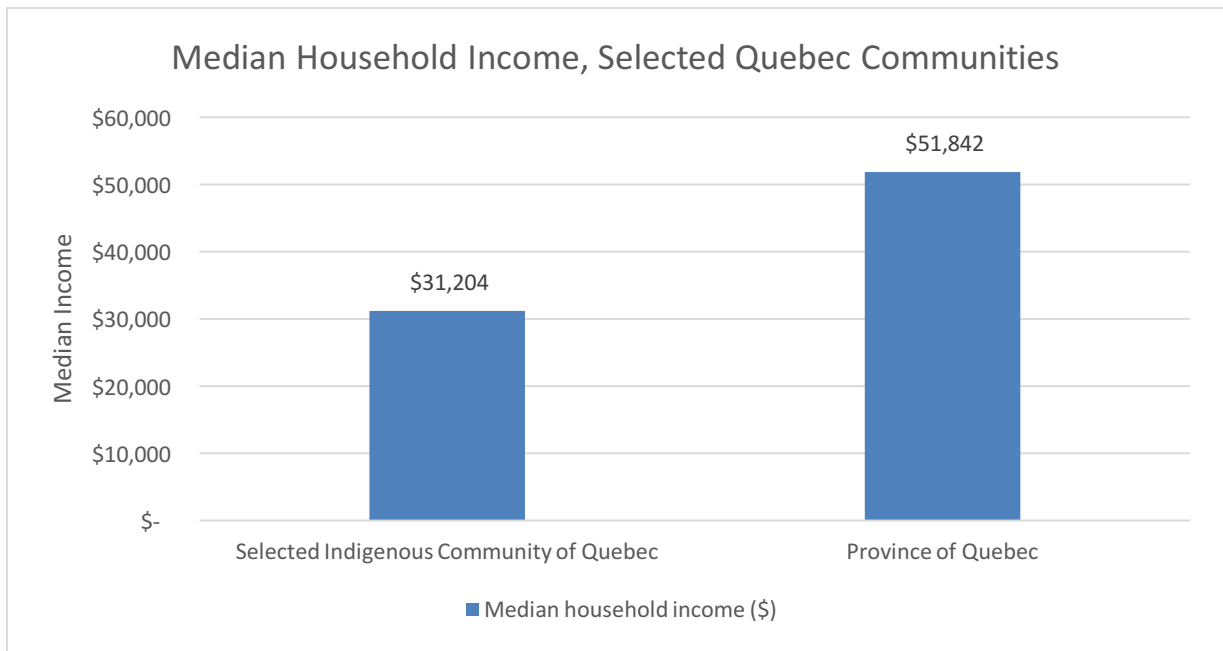
Quebec's Indigenous people were most likely to work in the 'other services' sector. Three in ten (28%) of Indigenous people in the province were employed in this category, compared to 16% for the general population of Quebec. Employment among Indigenous people was lower than the general population in most other industries, including the health and education sector (11%), manufacturing/construction (4%), wholesale/retail (3%), business services (4%), and transportation/warehousing (1%). An exception was the agriculture and resource based industry, where the relative frequency of employment among the Indigenous population (4%) exceeded that of the overall provincial population (23%).

Workforce Characteristics: Occupations, Selected Quebec Communities



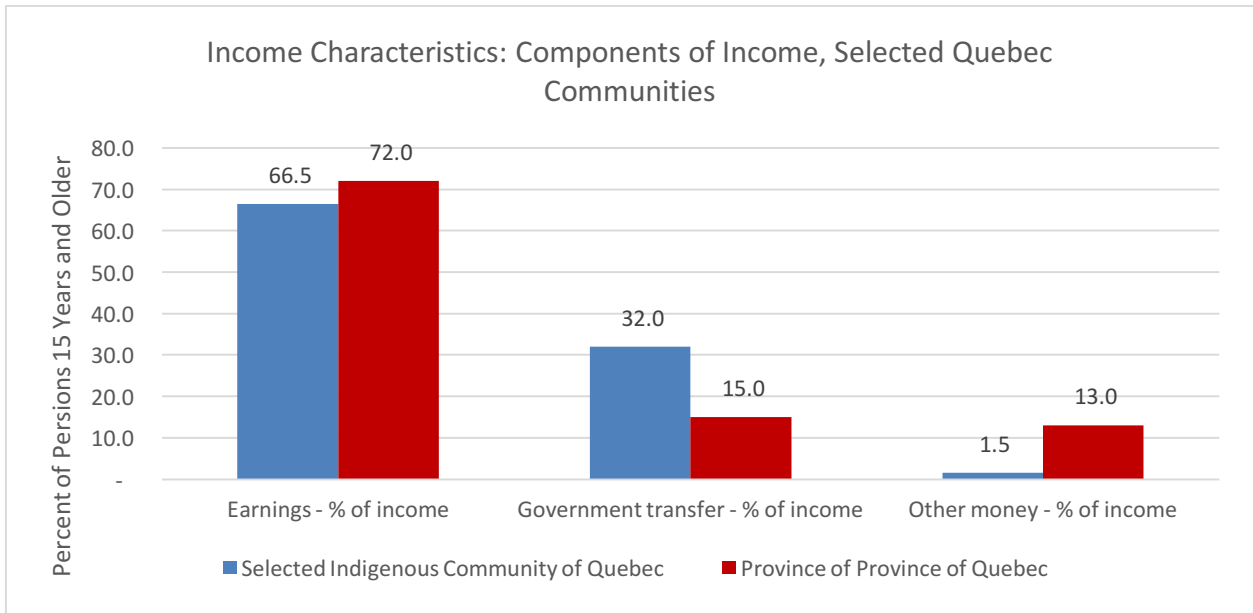
Workforce Characteristics: Industry Participation, Selected Quebec Communities





A workforce profile reveals notable differences in the occupational characteristics of the Indigenous and overall populations of Quebec. For example, Indigenous employment is considerably lower in the management sector (11%); natural sciences and health (6%) and the sales and service (9%) occupations relative to the overall population. Conversely, Indigenous employment was higher in social sciences and government (11%) and in primary industry (4%). At approximately 10%, employment in the trade related occupations was comparable among both populations.

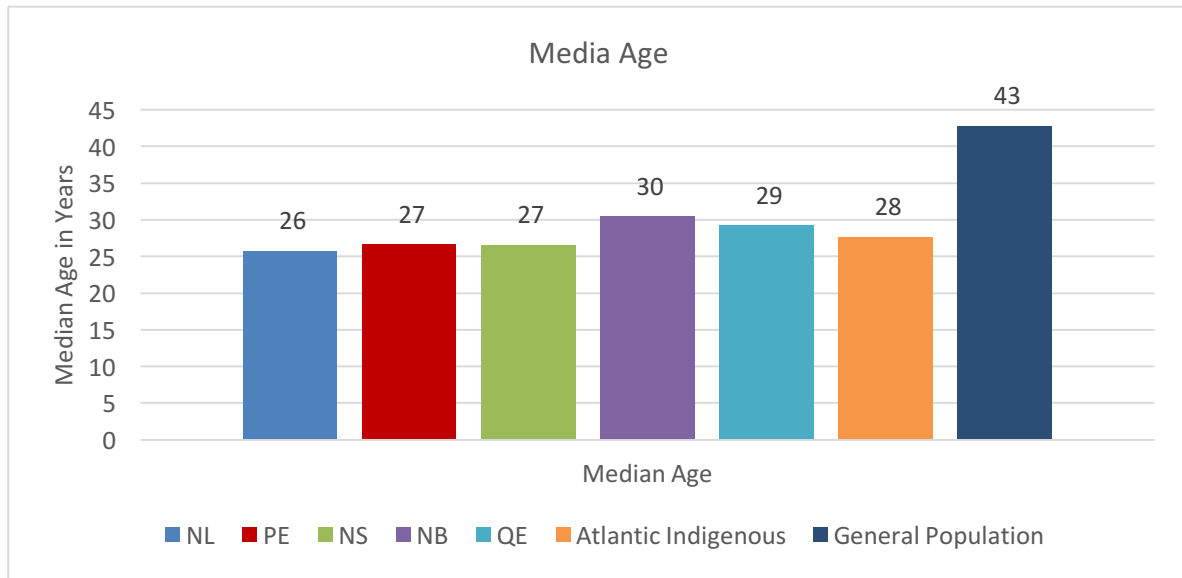
The median household income of \$31,204 for Quebec Indigenous communities was considerably lower than the provincial average. This compares to a median household income of \$51,842 for the entire province. Indigenous household income was 40% lower than the provincial average.



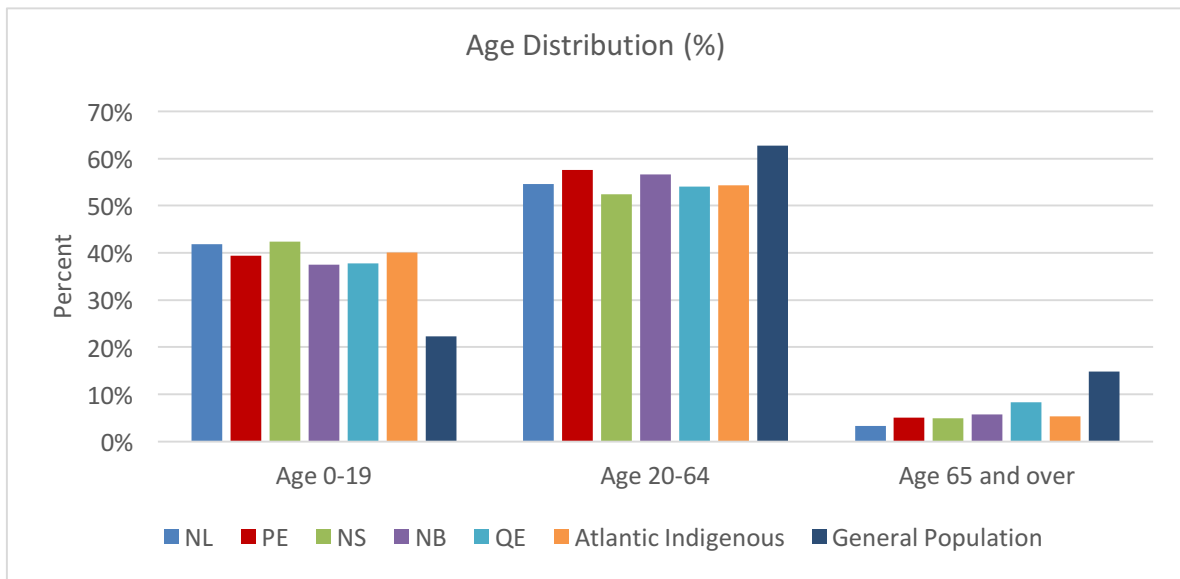
The percentage of income derived from earnings was somewhat lower for Indigenous people (67%) than for the overall population of Quebec (72%). The share of income from government transfers was higher for Indigenous people (32%) relative to all residents (15%). The share of income from other sources for Indigenous people was negligible (2%) compared to 13% for all of Quebec.

Comparison: Atlantic Region Socio-Demographic Profile

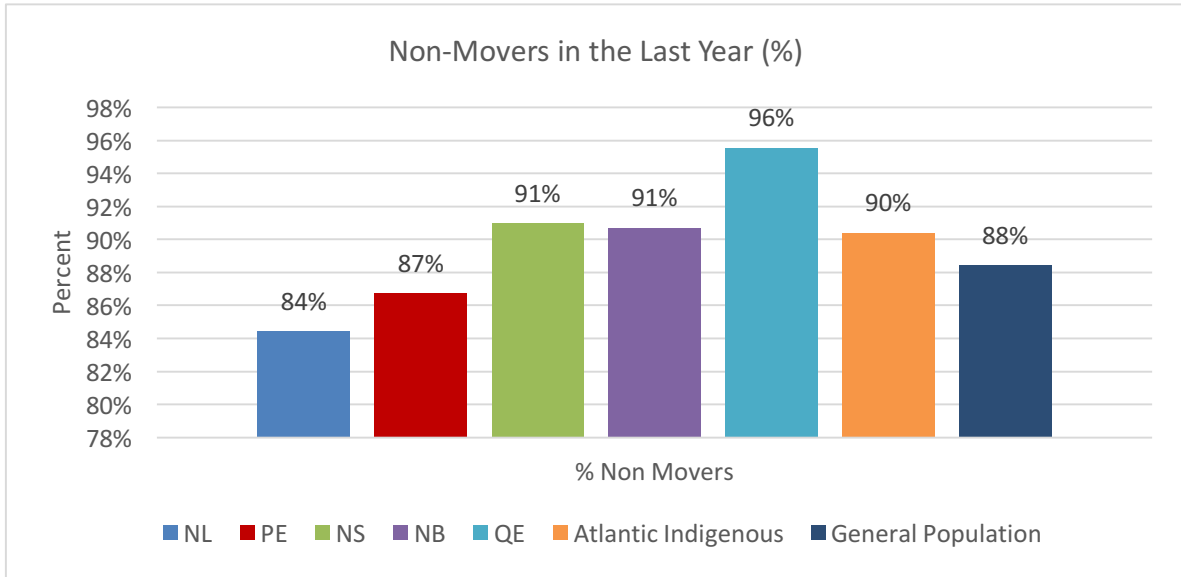
In this section we present a comparison of key socio-demographic statistics from each province to the general population of the Atlantic Region.



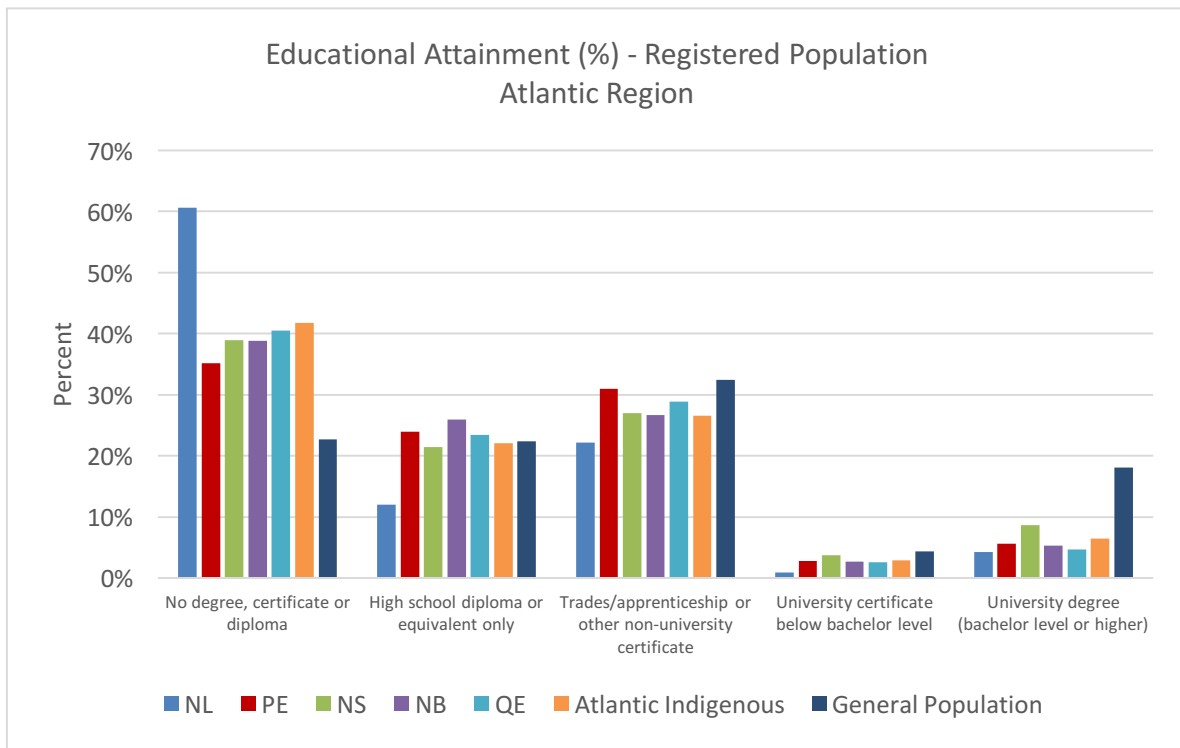
- The chart above profiles the median age of the registered population of Indigenous communities across the Atlantic region.
- Not only is Newfoundland and Labrador home to Atlantic Canada’s largest registered Indigenous population, but in addition, the province’s Indigenous population is also, at a median age of 26 years, the youngest. The younger age of Newfoundland Indigenous people may be related to the increased enrollment brought about by the recent Qalipu Mi’kmaq First Nation Agreement and Supplemental Agreement (2008 and 2013 respectively).
- The oldest Indigenous population is found in New Brunswick (median age of 30 years).
- On average, the Indigenous population of the Atlantic region is 28 compared to a median age of 43 for the general population – a difference of 15 years.



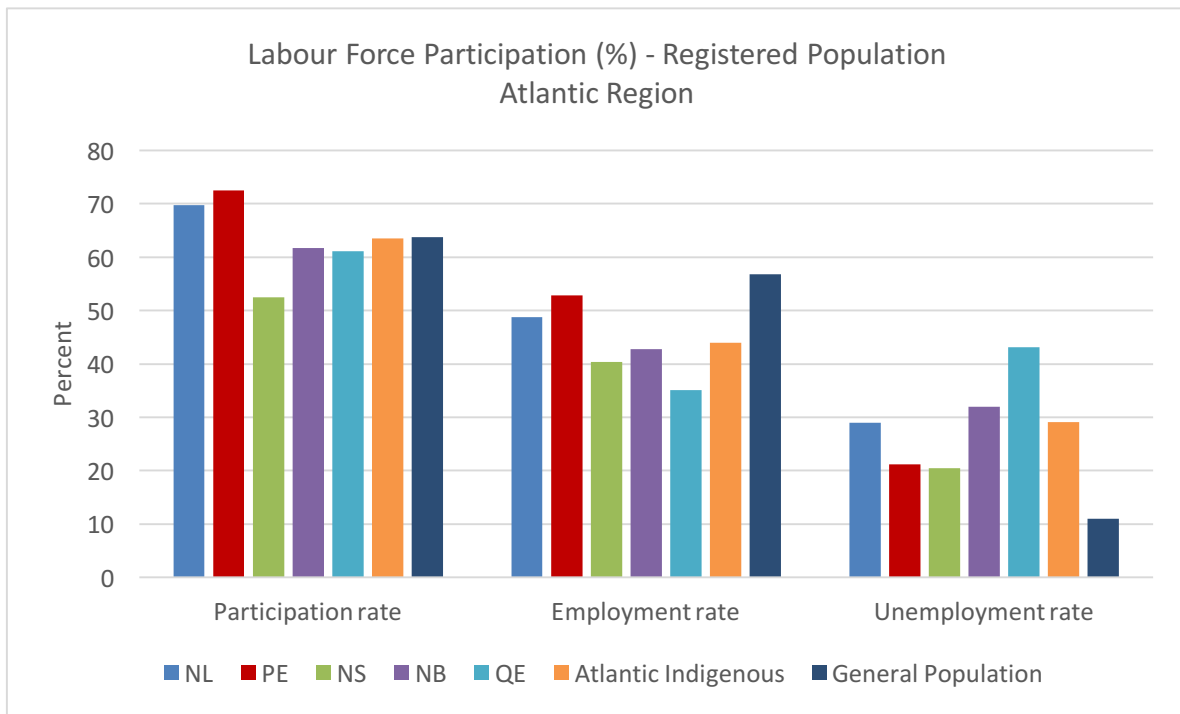
- The above chart profiles the age distribution of the registered population of Indigenous communities across the Atlantic region.
- The age distribution of the registered population contrasts with the general population of Atlantic Canada.
- On average, 40% of the registered population is 19 or younger. This is substantially higher than the share of youth in the overall population – 22%.
- The lowest share of registered youth is in New Brunswick – 37%. Even that is markedly higher than all residents of the region.
- In contrast, the share of seniors in the Indigenous population (5%) is considerably lower relative to the general population (15%) – a difference of threefold.
- Strikingly – only 3 in 100 (3%) registered Newfoundland and Labrador seniors are 65 or older. It is interesting to consider how Agreement enrollment may have affected the very low incidence of seniors.
- The share of the registered population in the 20-64 cohort is lower than the overall population of the Atlantic region – 54% vs 63%.



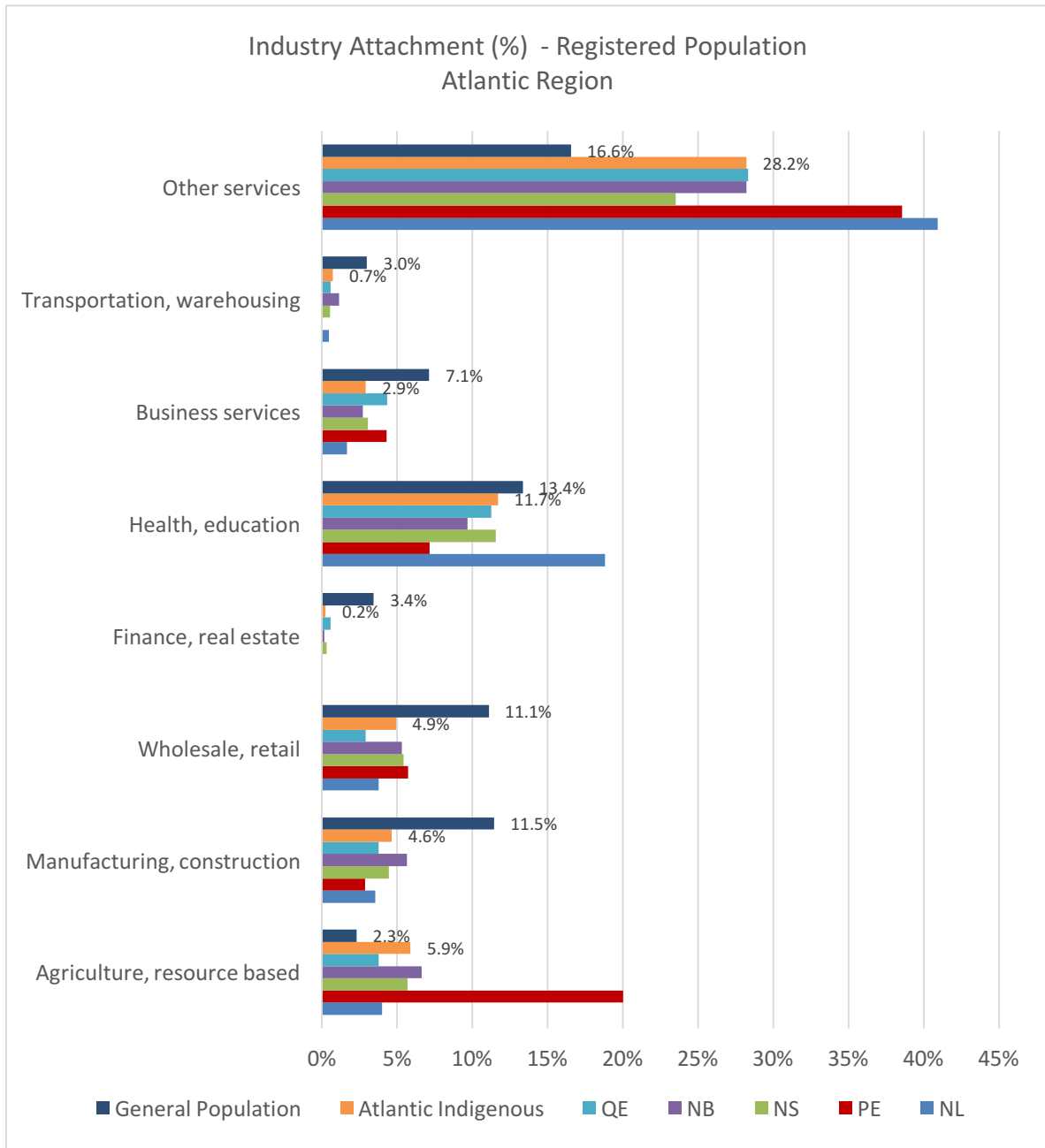
- The above chart profiles the mobility of the registered population of Indigenous communities across the Atlantic region.
- The mobility of the registered population varies considerably across the Atlantic region. The share of non-movers ranges from 84% in Newfoundland and Labrador to 96% in Quebec.
- The higher mobility in Newfoundland could be related to the increased enrollment.
- The share of non-movers in both Newfoundland and Labrador (84%) and Prince Edward Island (87%) is lower than both the Atlantic Indigenous (90%) and general populations (88%).



- The above chart profiles the educational attainment of the registered population of Indigenous communities across the Atlantic region.
- Education levels for registered residents are lower across the region than the overall population.
- Considerably more Indigenous people have not graduated high school. Four in ten (42%) of Indigenous members did not graduate high school relative to 23% of the general population of Atlantic Canada.
- The share of the population with a trade or apprenticeship designation is lower for all registered residents across the region relative to the general population (32%) – ranging from 22% in Newfoundland and Labrador to 31% Prince Edward Island.
- The rate of university certification and graduation is lower for all registered populations relative to the general population. The registered population of Newfoundland and Labrador posted the lowest rates of both certification and graduation.
- The university graduation rate was much lower for the regions registered population (6%) relative to the overall population of the region (18%) – a gap of two-thirds.



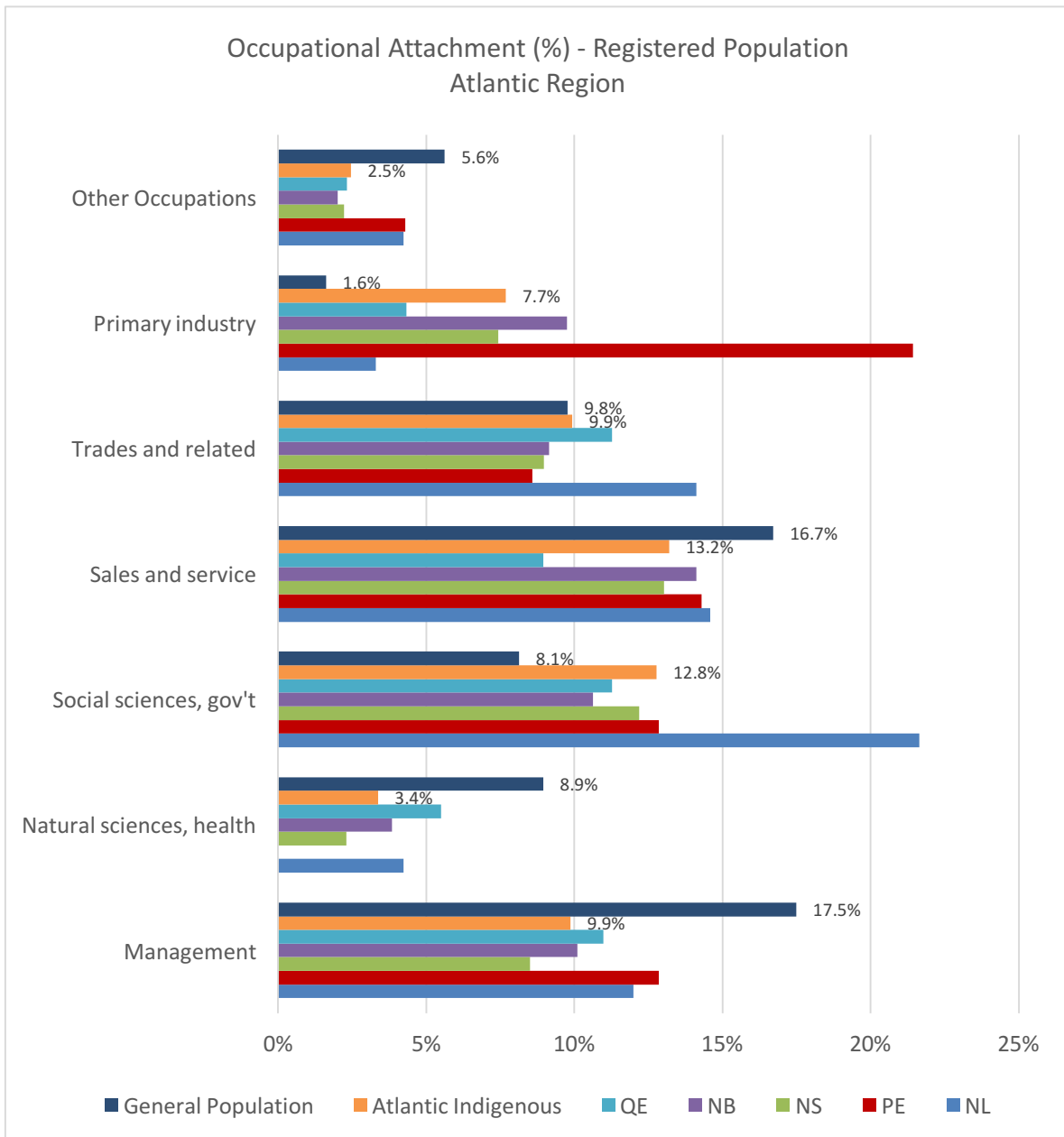
- The above chart profiles the labour force participation of the registered population of Indigenous communities across the Atlantic region.
- The labour force participation rate (64%) for the regions registered population matched the rate for the overall population. The participation rate of the registered population ranged from 73% in Prince Edward Island to 53% in Nova Scotia.
- The employment rates for registered residents across the region were consistently lower than the general population. Indigenous employment rates ranged from 35% in Quebec to 53% in Prince Edward Island relative to the general population (57%).
- Unemployment among Indigenous populations is much more prevalent. The unemployment rate is considerably higher in Quebec at 43%. The lowest registered population unemployment rate is in Nova Scotia (21%). Even at that, the Nova Scotia rate is still nearly double that of the overall population.



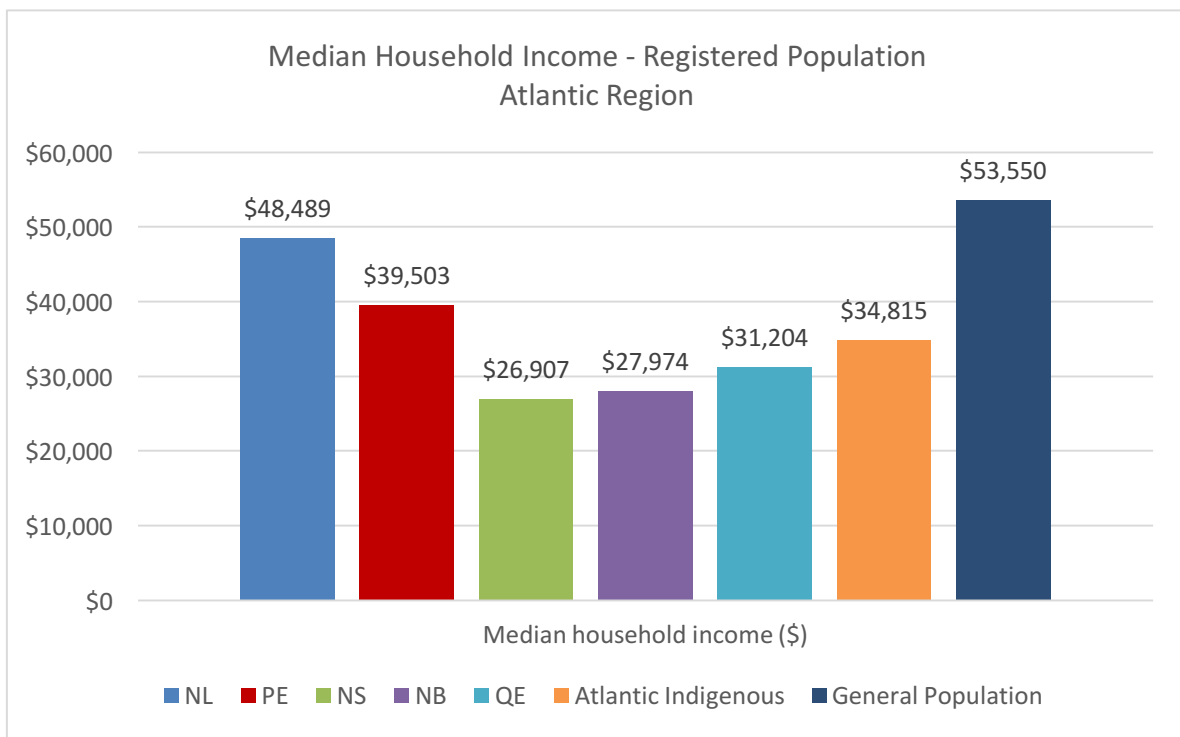
- The above chart profiles the industry attachment of the registered population of Indigenous communities across the Atlantic region.
- Industry attachment varies considerably between provincial registered populations. At the same time, industry attachment for registered residents contrasts with the overall population.
- Employment in the other services sector among registered residents was consistently higher than the general population. Nearly three in ten registered residents in the Atlantic region (28%) were employed in the other services sector relative to the overall population

(17%). The highest rate of employment in the other services sector was in Newfoundland and Labrador (39%).

- Agriculture and resources based employment was the only other sector that represented a higher share of Indigenous employment (6%) vs that the general population (2%). This is partly a reflection of the more rural based registered population. Registered residents in Prince Edward Island had the highest employment in the agriculture and resource based sector – 20%.
- Indigenous employment was lower in all other sectors including transportation, business services, health/education, finance, wholesale/retail and manufacturing.

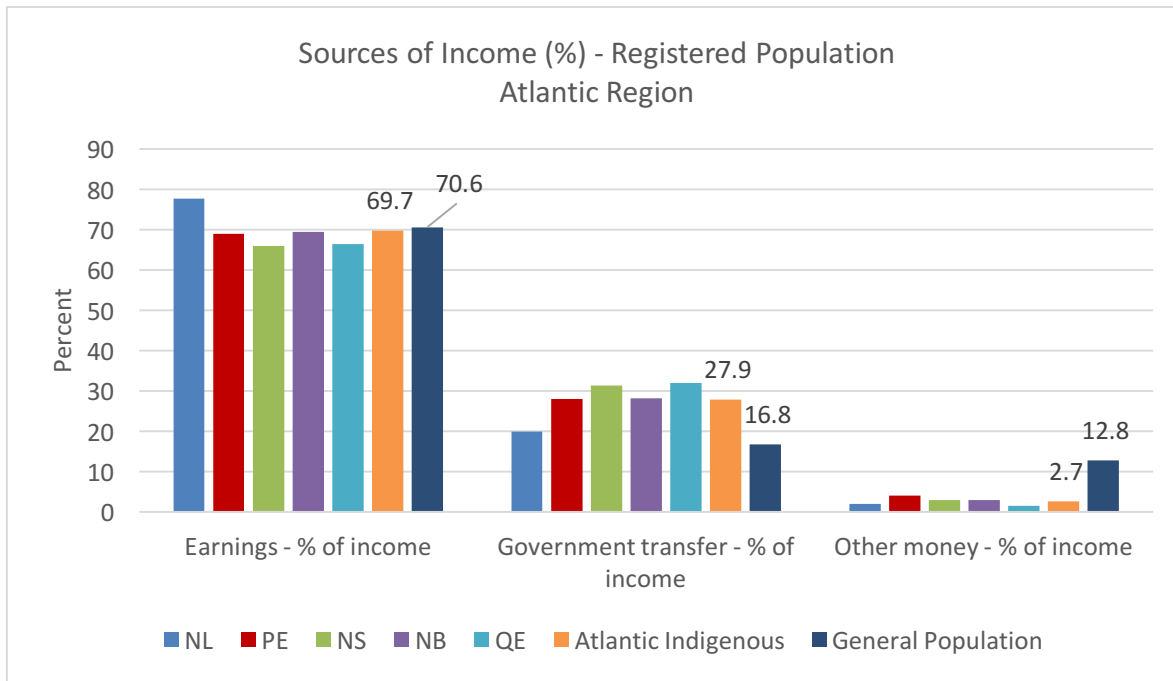


- The above chart profiles the occupational attachment of the registered population of Indigenous communities across the Atlantic region.
- A workforce profile reveals a couple of striking differences between the occupational characteristics of the Indigenous and overall populations of the Atlantic region.
- Indigenous employment is considerably lower in the management (10%); natural sciences and health (3%); and the sales and service (13%) occupations relative to the overall population.
- Alternatively, Indigenous employment was higher in social sciences and government (13%) and primary industry (8%). Employment in the trade related occupations was comparable among both populations at 10%.
- Employment in primary industry occupations among registered residents of Prince Edward Island was noteworthy at 21%. On the other hand, employment in social science and education occupations among registered residents of Newfoundland and Labrador was considerably higher than all other populations at 13%.



- The above chart profiles the household income of the registered population of Indigenous communities across the Atlantic region.
- The median household income for the Indigenous communities of the Atlantic region was \$34,815. This compares to a median household income of \$53,550 for the entire region.
- Indigenous household incomes were 35% lower than the regional average.
- Median registered resident incomes ranged from a low of \$26,907 in Nova Scotia to a high of \$48,489 in Newfoundland and Labrador.

- Registered resident incomes in Prince Edward Island (\$39,503) were above the regional average for Indigenous people, while New Brunswick (\$27,975) and Quebec (\$31,204) fell below the average.



- The above chart profiles the income sources of the registered population of Indigenous communities across the Atlantic region.
- Earnings accounted for the bulk of income for all registered populations and the general population.
- The percentage of income derived from earnings was comparable for Indigenous people (70%) and the overall population of the Atlantic region (71%).
- The share of earnings among registered residents was highest in Newfoundland and Labrador (78%) where income was also higher.
- The share of income from government transfers was higher for Indigenous people (28%) relative to all residents (17%).
- The share of income from other sources for Indigenous people was negligible (3%) compared to 13% for all Atlantic residents. This may be a function of lower Indigenous access to retirement and investment income.

Appendix B: Communities Included

Band Number	Official Name	Address	Prov
47	Miawpukek	50 MIAWPUKEK DRIVE, PO BOX 10, CONNE RIVER, NF, AoH 1Jo	NL
32	Mushuau Innu First Nation	PO BOX 190, NATUASHISH, NF, AoP 1Ao	NL
34	Qalipu Mi'kmaq First Nation	3 CHURCH STREET, CORNER BROOK, NF, A2H 2Z4	NL
33	Sheshatshiu Innu First Nation	PO BOX 160, SHESHATSHIU FIRST NATION, NF, AoP 1Mo	NI
18	Acadia	10526 HIGHWAY 3, YARMOUTH, NS, B5A 4A8	NS
20	Annapolis Valley	29 TONEY BLVD, CAMBRIDGE 32, NS, BoP 1Go	NS
21	Bear River	PO BOX 210, BEAR RIVER, NS, BoS 1Bo	NS
23	Eskasoni	PO BOX 7040, 63 MINI MALL DRIVE, ESKASONI, NS, B1W 1A1	NS
30	Glooscap First Nation	159 SMITH ROAD, HANTSPORT, NS, BoP 1Po	NS
26	Membertou	111 MEMBERTOU STREET, SYDNEY, NS, B1S 2M9	NS
27	Millbrook	PO BOX 634, TRURO, NS, B2N 5E5	NS
19	Paqtnkek Mi'kmaw Nation	RR 1, 7 DILLAN STREET, AFTON, NS, BoH 1Ao	NS
24	Pictou Landing	43 MAPLE STREET, RR 2 BOX 55 SITE 6, TRENTON, NS, BoK 1Xo	NS
22	Potlotek First Nation	PO BOX 538, CHAPEL ISLAND, NS, BoE 3Bo	NS
25	Sipekne'katik	522 CHURCH STREET, INDIAN BROOK, NS, BoN 1Wo	NS
28	Wagmatcook	PO BOX 30001, WAGMATCOOK, NS, BoE 3No	NS
29	Waycobah First Nation	PO BOX 149, WHYCOCOMAGH, NS, BoE 3Mo	NS
4	Buctouche	9 RESERVE ROAD, BUCTOUCHE RESERVE, NB, E4S 4G2	NB
7	Eel Ground	47 CHURCH RD, EEL GROUND, NB, E1V 4E6	NB
8	Eel River Bar First Nation	11 MAIN STREET, UNIT 201, EEL RIVER BAR, NB, E8C 1A1	NB
3	Elsipogtog First Nation	373 BIG COVE ROAD, ELSIPOGTOG FIRST NATION, NB, E4W 2S3	NB
5	Esgenoopetitj First Nation	621 BAYVIEW DRIVE, BURNT CHURCH, NB, E9G 2A8	NB
9	Fort Folly	PO BOX 1007, DORCHESTER, NB, E4K 3V5	NB
10	Indian Island	61 INDIAN ISLAND DRIVE, INDIAN ISLAND, NB, E4W 1S9	NB
11	Kingsclear	77 FRENCH VILLAGE RD, KINGSCLEAR FIRST NATION, NB, E3E 1K3	NB
6	Madawaska Maliseet First Nation	1771 MAIN STREET, MADAWASKA MALISEET FIRST NAT, NB, E7C 1W9	NB
14	Metepenagiag	PO BOX 293, METEPENAGIAG MI'KMAQ NATION, NB,	NB

	Mi'kmaq Nation	EgE 2P2	
12	Oromocto	PO BOX 417, 33 HIAWATHA AVENUE, OROMOCTO, NB, E2V 2J2	NB
13	Pabineau	1290 PABINEAU FALLS ROAD, PABINEAU FIRST NATION, NB, E2A 7M3	NB
15	Saint Mary's	150 CLIFFE STREET, FREDERICTON, NB, E3A 2T1	NB
16	Tobique	13156 ROUTE 105, TOBIQUE FIRST NATION, NB, E7H 5M7	NB
17	Woodstock	3 WULASTOOK COURT, WOODSTOCK FIRST NATION, NB, E7M 4K6	NB
1	Abegweit	PO BOX 36, 11222 ST. PETERS ROAD, SCOTCHFORT, PE, CoA 1To	PE
2	Lennox Island	PO BOX 134, LENNOX ISLAND, PE, CoB 1Po	PE
53	La Nation Micmac de Gespeg	783 BOUL POINTE NAVARRE, CP 69, FONTENELLE, QC, G4X 6V2	QE
51	Listuguj Mi'gmaq Government	17 RIVERSIDE STREET WEST, PO BOX 298, LISTUGUJ, QC, GoC 2Ro	QE
52	Micmacs of Gesgapegiag	100 PERRON BLVD, PO BOX 1280, MARIA, QC, GoC 1Yo	QE
54	Première Nation Malecite de Viger	217 RUE DE LA GRÈVE, CACOUNA, QC, GoL 1Go	QE

Appendix D: Business Activities and Band-Owned Businesses (Within Communities Participating in the Study)

- Fisheries (includes leasing and acquisition of licenses (e.g. lobster, snow crab, blue fin tuna, scallops, gaspereau and swordfish), harvesting and processing, hatchery –brook trout, salmon, Seafood companies);
- Property Management (including commercial reality, leasing of land and buildings, apartment buildings)
- IT (Data Centre)
- Gaming (Includes Casino, Bingo, VLTs, Entertainment Centres)
- Geomatics
- Hotel
- Convention Centre
- Cultural and Heritage Centres
- Retail (tobacco, convenience, supermarket)
- Wind energy
- Community crafters/artisans
- Foodservice (restaurants and fast food take-outs)
- Gas Bar
- Blueberry harvesting
- Building Supplies
- Security Business (provides employment for 21 guards operating in NS and NB)
- Entrepreneur and Skills Development Centre
- Auto Marine Parts and Service (vehicle, heavy duty trucks and marine vessel repair)
- Day Care
- Commercial Mall Development
- Forestry
- Recreation Centre
- Outdoor Adventure Lodge (which includes 4 Star conference facility)

- **Types of businesses operated by community members:**
 - Trades related (electrical, drywall and carpentry)
 - Retail (convenience, tobacco, gift and craft stores)
 - Foodservice (take-outs, community catering)
 - Ink Cartridge Refill
 - Bricks for Kids (Lego classes and programs for kids)
 - Greenhouse/florist
 - Auto Mechanic Shop
 - Body Shop
 - Wood Working
 - Musical Band (Red Ochre)
 - Photography

- **Types of businesses operated on reserve by non-Indigenous businesses**
 - Recreational vehicle sales
 - Cinema
 - Furniture and home electronics
 - Hotel
 - Gas Bar
 - Convenience Stores
 - Fast Food Restaurants

The following provides a breakdown of economic development priorities identified during the outreach process:

- **Fisheries** –Includes expansion or improvement to current operations, capacity building, increase acquisition and leasing of licenses, purchase hatchery farms, packaging of silver hake and red fish, trout operations
- **Cultivation**- Blueberry and cranberry operations
- **Tourism/Eco-tourism**- Expansion of tourism internationally, development of tourism and cultural experience packages (e.g. medicine walks, powwows), development of destination development for highway project
- **Property Management**- Includes land acquisitions for future development and development of lands for commercial use. Land development by communities is taking place on and off reserve (e.g. Power Centre/Business Parks).
- An informant for one of the communities interviewed, indicated that two major properties worth \$17.5 million is being purchased 100% by the community without accessing any type of funding.
- **Improved Operations** – Several informants identified that one of the key economic priorities for their respective community is to review current business operations in order to increase efficiency and profitability of all band owned businesses
- **Development of Community Equity Program** to assist community members start their own business
- Some communities exploring **Service and Office Sectors** but not in position to share specifics
- **Retail establishments**- Pharmacy, Supermarket
- **Foodservice**- Pursing potential catering business
- **Renewable/Wind Energy** – Communities have or are in the process of creating employment opportunities for community members. There are also efforts being made to pursue the development of wind energy in areas such as Indian Island.
- Also one community is currently investigating renewable energy opportunities such as tidal power. Revenue sharing agreements for wind turbines in Bridgewater.
- **Sports and Recreation Centre**- will provide access for community members and local region to access additional sports and recreation programs and events. Year round access to ice.
- **Relocation of smoke shop to Power Centre**
- **Laser Treatment Centres**- Smoking and eating disorders
- **Air Charter Sales and Passenger Services**

- **Business Plan** being developed to look at feasibility of purchasing homes and renting them
- **Medical Marijuana** -2 communities looking setting up medical Marijuana Company
- **Wine and Craft Beer Industry**
- **Long-term Care facility**
- **Walking Trail Development**
- **Heritage and Interpretation Centre**
- **Create regional wealth-One community is already third largest employer in its region. Also seeking political power for the region.**
- **Infrastructure Projects-** Build new sub division, school, sewer and water

Appendix E: Statistical Tables

Household Spending

GROSS PRODUCTION (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$17.5	\$4.6	\$78.7	\$75.1	\$29.6	\$36.8	\$242.2
INDIRECT	\$3.7	\$1.4	\$18.9	\$15.4	\$24.5	\$40.0	\$104.0
INDUCED	\$8.0	\$2.4	\$36.3	\$29.5	\$33.8	\$53.4	\$163.4
TOTAL	\$29.2	\$8.3	\$133.9	\$120.1	\$87.9	\$130.3	\$509.6

EMPLOYMENT

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	105	32	505	482	162	185	1,471
INDIRECT	19	8	107	80	124	174	513
INDUCED	20	8	104	78	112	161	482
TOTAL	144	49	716	640	397	520	2,466

HOUSEHOLD INCOME (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$4.8	\$1.2	\$20.0	\$18.1	\$8.4	\$10.4	\$62.9
INDIRECT	\$1.0	\$0.3	\$4.8	\$3.5	\$6.7	\$10.6	\$27.0
INDUCED	\$0.9	\$0.3	\$4.2	\$3.1	\$5.4	\$8.9	\$22.8
TOTAL	\$6.8	\$1.8	\$29.0	\$24.8	\$20.5	\$29.9	\$112.7

GROSS DOMESTIC PRODUCT (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$12.7	\$3.1	\$55.0	\$54.1	\$14.0	\$16.4	\$155.3
INDIRECT	\$1.6	\$0.6	\$8.1	\$6.4	\$10.8	\$17.6	\$45.1
INDUCED	\$2.3	\$0.7	\$10.8	\$8.2	\$11.1	\$18.2	\$51.3
TOTAL	\$16.7	\$4.5	\$73.9	\$68.7	\$35.9	\$52.2	\$251.8

GOVERNMENT TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$3.2	\$0.7	\$14.9	\$15.1	\$2.2	\$2.2	\$38.3
INDIRECT	\$0.2	\$0.1	\$1.4	\$1.0	\$2.0	\$2.7	\$7.3
INDUCED	\$0.6	\$0.2	\$3.0	\$2.3	\$3.0	\$4.3	\$13.4
TOTAL	\$4.0	\$1.0	\$19.3	\$18.4	\$7.1	\$9.2	\$59.0

FEDERAL TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$1.1	\$0.2	\$4.7	\$4.6	\$0.9	\$1.1	\$12.6
INDIRECT	\$0.1	\$0.0	\$0.6	\$0.5	\$0.9	\$1.4	\$3.6
INDUCED	\$0.2	\$0.1	\$1.0	\$0.8	\$1.0	\$1.7	\$4.7
TOTAL	\$1.4	\$0.3	\$6.3	\$5.8	\$2.8	\$4.3	\$20.9

PROVINCIAL TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$1.8	\$0.5	\$7.3	\$8.5	\$1.1	\$0.9	\$20.0
INDIRECT	\$0.1	\$0.0	\$0.6	\$0.5	\$1.0	\$1.0	\$3.3
INDUCED	\$0.3	\$0.1	\$1.5	\$1.3	\$1.6	\$1.8	\$6.5
TOTAL	\$2.2	\$0.6	\$9.4	\$10.3	\$3.7	\$3.7	\$29.9

Business Spending

GROSS PRODUCTION (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$6.2	\$1.4	\$26.6	\$28.4	\$0.0	\$3.4	\$66.0
INDIRECT	\$1.9	\$0.5	\$10.2	\$7.5	\$16.9	\$23.2	\$60.1
INDUCED	\$3.1	\$0.9	\$14.7	\$13.3	\$12.3	\$18.7	\$63.0
TOTAL	\$11.2	\$2.7	\$51.5	\$49.2	\$29.2	\$45.3	\$189.2

EMPLOYMENT (Person Years)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	94	21	406	433	-	1	955
INDIRECT	10	3	49	34	86	102	284
INDUCED	7	3	39	32	41	57	179
TOTAL	111	27	494	499	127	160	1,418

HOUSEHOLD INCOME (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$1.9	\$0.4	\$8.1	\$8.7	\$0.0	\$0.0	\$19.1
INDIRECT	\$0.5	\$0.1	\$2.3	\$1.4	\$5.2	\$6.9	\$16.5
INDUCED	\$0.3	\$0.1	\$1.6	\$1.3	\$2.0	\$3.2	\$8.4
TOTAL	\$2.7	\$0.7	\$12.0	\$11.4	\$7.2	\$10.1	\$44.0

GROSS DOMESTIC PRODUCT (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$2.2	\$0.5	\$9.3	\$9.9	\$0.0	\$0.1	\$21.9
INDIRECT	\$0.8	\$0.2	\$4.0	\$2.8	\$8.9	\$11.4	\$28.2
INDUCED	\$0.8	\$0.3	\$4.2	\$3.5	\$4.1	\$6.4	\$19.2
TOTAL	\$3.8	\$1.0	\$17.4	\$16.2	\$13.0	\$17.9	\$69.3

GOVERNMENT TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$0.3	\$0.1	\$1.6	\$1.5	\$0.0	\$0.1	\$3.5
INDIRECT	\$0.1	\$0.0	\$0.5	\$0.4	\$1.4	\$1.6	\$4.0
INDUCED	\$0.2	\$0.1	\$1.2	\$1.0	\$1.1	\$1.5	\$5.1
TOTAL	\$0.7	\$0.2	\$3.3	\$2.9	\$2.5	\$3.1	\$12.7

FEDERAL TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$0.2	\$0.0	\$0.8	\$0.8	\$0.0	\$0.0	\$1.9
INDIRECT	\$0.0	\$0.0	\$0.2	\$0.2	\$0.6	\$0.8	\$1.9
INDUCED	\$0.1	\$0.0	\$0.4	\$0.3	\$0.4	\$0.6	\$1.8
TOTAL	\$0.3	\$0.1	\$1.5	\$1.3	\$1.0	\$1.4	\$5.6

PROVINCIAL TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$0.1	\$0.0	\$0.7	\$0.6	\$0.0	\$0.0	\$1.5
INDIRECT	\$0.0	\$0.0	\$0.2	\$0.2	\$0.7	\$0.6	\$1.8
INDUCED	\$0.1	\$0.0	\$0.6	\$0.6	\$0.6	\$0.6	\$2.5
TOTAL	\$0.3	\$0.1	\$1.5	\$1.4	\$1.3	\$1.3	\$5.9

Band Spending

GROSS PRODUCTION (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$95.0	\$22.2	\$241.5	\$351.4	\$0.0	\$0.0	\$710.1
INDIRECT	\$30.5	\$8.9	\$92.2	\$133.3	\$122.0	\$196.8	\$583.5
INDUCED	\$83.7	\$21.1	\$228.3	\$250.1	\$130.0	\$217.8	\$930.9
TOTAL	\$209.1	\$52.2	\$561.9	\$734.8	\$251.9	\$414.6	\$2,224.5

EMPLOYMENT (Person Years)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	1,145	246	2,706	3,176	-	-	7,273
INDIRECT	263	96	877	1,249	655	960	4,100
INDUCED	187	63	619	611	483	716	2,679
TOTAL	1,595	405	4,202	5,036	1,137	1,676	14,053

HOUSEHOLD INCOME (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$50.7	\$10.9	\$120.2	\$140.3	\$0.0	\$0.0	\$322.2
INDIRECT	\$12.1	\$3.3	\$33.8	\$46.0	\$33.7	\$57.8	\$186.7
INDUCED	\$8.8	\$2.4	\$25.3	\$24.0	\$24.4	\$40.4	\$125.2
TOTAL	\$71.6	\$16.6	\$179.3	\$210.3	\$58.0	\$98.2	\$634.1

GROSS DOMESTIC PRODUCT (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$51.1	\$11.0	\$121.3	\$142.3	\$0.0	\$0.0	\$325.8
INDIRECT	\$16.0	\$4.7	\$49.3	\$64.6	\$57.1	\$89.7	\$281.4
INDUCED	\$22.2	\$6.0	\$65.6	\$65.7	\$46.7	\$78.2	\$284.5
TOTAL	\$89.4	\$21.8	\$236.2	\$272.6	\$103.8	\$168.0	\$891.7

GOVERNMENT TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$5.5	\$1.4	\$11.5	\$14.1	\$0.0	\$0.0	\$32.6
INDIRECT	\$1.1	\$0.3	\$5.9	\$5.7	\$9.1	\$12.5	\$34.7
INDUCED	\$6.3	\$1.6	\$18.9	\$19.6	\$11.3	\$17.0	\$74.7
TOTAL	\$12.9	\$3.4	\$36.3	\$39.4	\$20.4	\$29.6	\$142.0

FEDERAL TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$3.0	\$0.7	\$5.9	\$7.4	\$0.0	\$0.0	\$17.1
INDIRECT	\$0.7	\$0.2	\$2.7	\$3.0	\$4.1	\$6.6	\$17.4
INDUCED	\$2.2	\$0.5	\$6.2	\$6.3	\$4.0	\$7.1	\$26.3
TOTAL	\$5.9	\$1.4	\$14.9	\$16.8	\$8.1	\$13.7	\$60.9

PROVINCIAL TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$2.4	\$0.7	\$5.3	\$6.4	\$0.0	\$0.0	\$14.8
INDIRECT	\$0.5	\$0.1	\$2.7	\$2.5	\$4.6	\$4.9	\$15.3
INDUCED	\$3.4	\$1.0	\$9.2	\$10.9	\$5.9	\$7.0	\$37.4
TOTAL	\$6.3	\$1.9	\$17.2	\$19.7	\$10.5	\$11.9	\$67.5

Organizations Spending

GROSS PRODUCTION (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$17.5	\$14.6	\$40.8	\$29.1	\$0.0	\$0.0	\$102.0
INDIRECT	\$4.4	\$3.7	\$20.5	\$9.6	\$18.1	\$39.3	\$95.7
INDUCED	\$9.4	\$8.0	\$26.7	\$15.7	\$15.5	\$36.4	\$111.6
TOTAL	\$31.3	\$26.3	\$88.0	\$54.5	\$33.5	\$75.7	\$309.3

EMPLOYMENT (Person Years)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	112	93	261	187	-	-	653
INDIRECT	27	31	107	41	84	206	496
INDUCED	21	21	73	40	55	108	317
TOTAL	160	145	441	268	139	314	1,466

HOUSEHOLD INCOME (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$5.7	\$4.8	\$13.4	\$9.5	\$0.0	\$0.0	\$33.4
INDIRECT	\$1.5	\$1.4	\$5.3	\$1.8	\$5.6	\$17.0	\$32.7
INDUCED	\$1.0	\$0.8	\$3.0	\$1.6	\$2.7	\$5.9	\$15.0
TOTAL	\$8.2	\$7.0	\$21.7	\$12.9	\$8.4	\$22.9	\$81.1

GROSS DOMESTIC PRODUCT (millions)

Impacts	Newfoundl and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Rest of Canada	Total Canada
DIRECT	\$5.8	\$4.8	\$13.5	\$9.7	\$0.0	\$0.0	\$33.8
INDIRECT	\$2.3	\$2.1	\$7.9	\$3.3	\$8.1	\$22.0	\$45.5
INDUCED	\$2.5	\$2.2	\$7.7	\$4.2	\$5.4	\$12.3	\$34.2
TOTAL	\$10.6	\$9.1	\$29.1	\$17.1	\$13.4	\$34.2	\$113.5

GOVERNMENT TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$0.6	\$0.6	\$1.3	\$0.9	\$0.0	\$0.0	\$3.5
INDIRECT	\$0.3	\$0.2	\$1.0	\$0.4	\$1.2	\$3.0	\$6.1
INDUCED	\$0.7	\$0.6	\$2.2	\$1.2	\$1.3	\$2.9	\$9.0
TOTAL	\$1.6	\$1.5	\$4.4	\$2.6	\$2.6	\$5.9	\$18.6

FEDERAL TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$0.3	\$0.3	\$0.7	\$0.5	\$0.0	\$0.0	\$1.8
INDIRECT	\$0.1	\$0.1	\$0.4	\$0.2	\$0.5	\$1.7	\$3.1
INDUCED	\$0.2	\$0.2	\$0.7	\$0.4	\$0.5	\$1.2	\$3.2
TOTAL	\$0.7	\$0.6	\$1.8	\$1.1	\$1.0	\$2.8	\$8.1

PROVINCIAL TAX REVENUES (millions)

Impacts	NL	PE	NS	NB	QE	Rest of Canada	Total Canada
DIRECT	\$0.3	\$0.3	\$0.6	\$0.4	\$0.0	\$0.0	\$1.6
INDIRECT	\$0.1	\$0.1	\$0.4	\$0.2	\$0.6	\$1.1	\$2.7
INDUCED	\$0.4	\$0.4	\$1.1	\$0.7	\$0.7	\$1.2	\$4.5
TOTAL	\$0.8	\$0.8	\$2.1	\$1.3	\$1.3	\$2.4	\$8.7