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# Connecting Canada

Calgary and Edmonton:  
Opportunities for Canada in Alberta's Economy

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# Agenda

- Alberta Overview
- The Opportunities
- The Challenges
- Alberta & Québec – better working together

# Alberta Overview

“The Calgary-Edmonton corridor is the only Canadian urban centre to amass a U.S.-level of wealth while preserving a Canadian-style quality of life.”

- ❑ Canada’s strongest economy
- ❑ Largest industrial corridor
- ❑ Rapidly growing and young population
- ❑ Exceeding US\$57,000 GDP per capita
- ❑ 35% above USA metro average
- ❑ 60% above Canadian metro areas
- ❑ GDP per capita 2<sup>nd</sup> only to Luxembourg



Source: *The Calgary-Edmonton Corridor Report* | TD Bank: September 2007

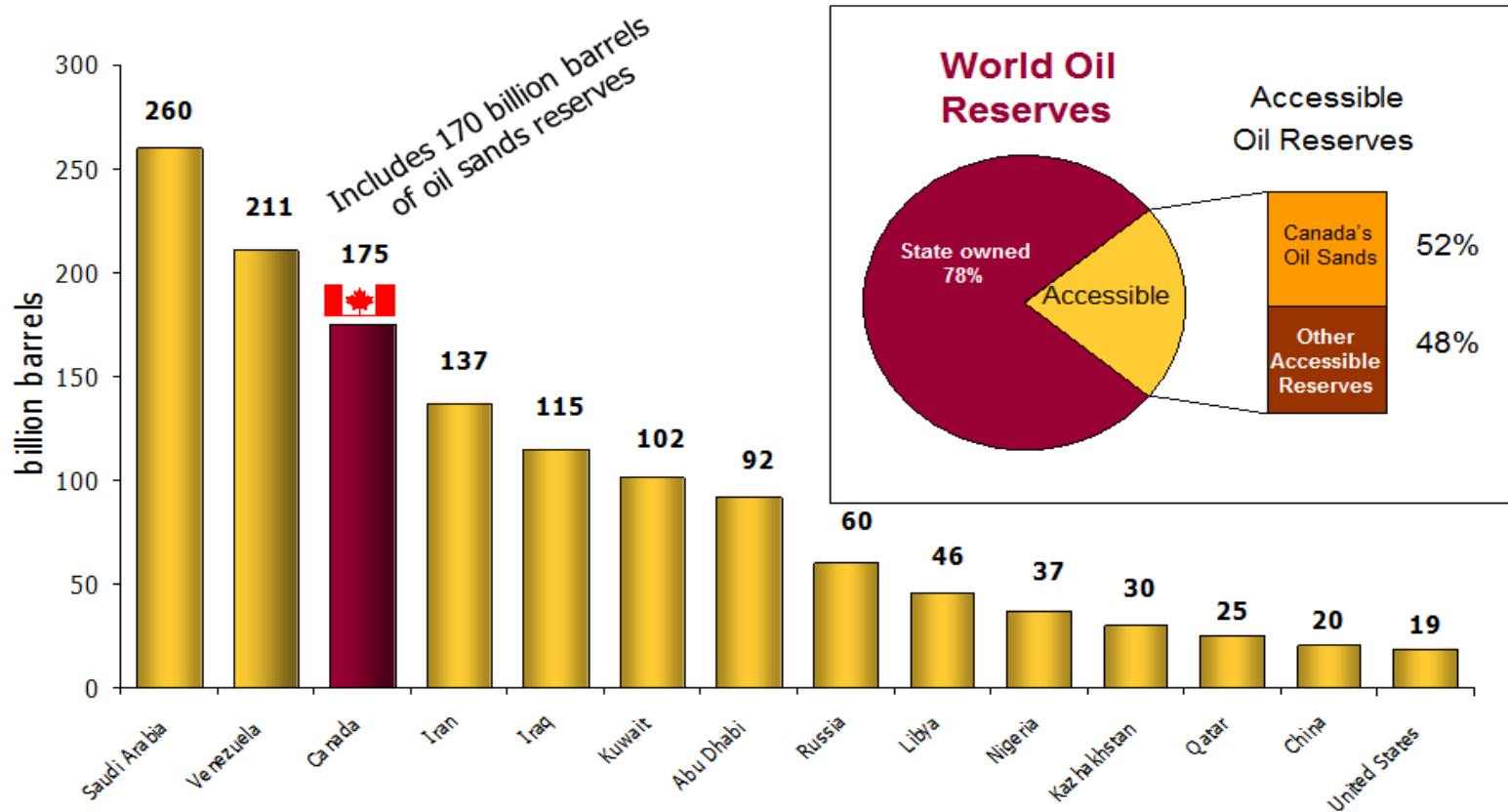
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# La Francophonie en Alberta

- 62,000 Albertans self-identify as Francophone
- 225,000 Albertans speak French– 2nd largest language group after English
- 390,000 Albertans are of French or Acadian decent – the 3rd largest cultural group

# The Opportunity

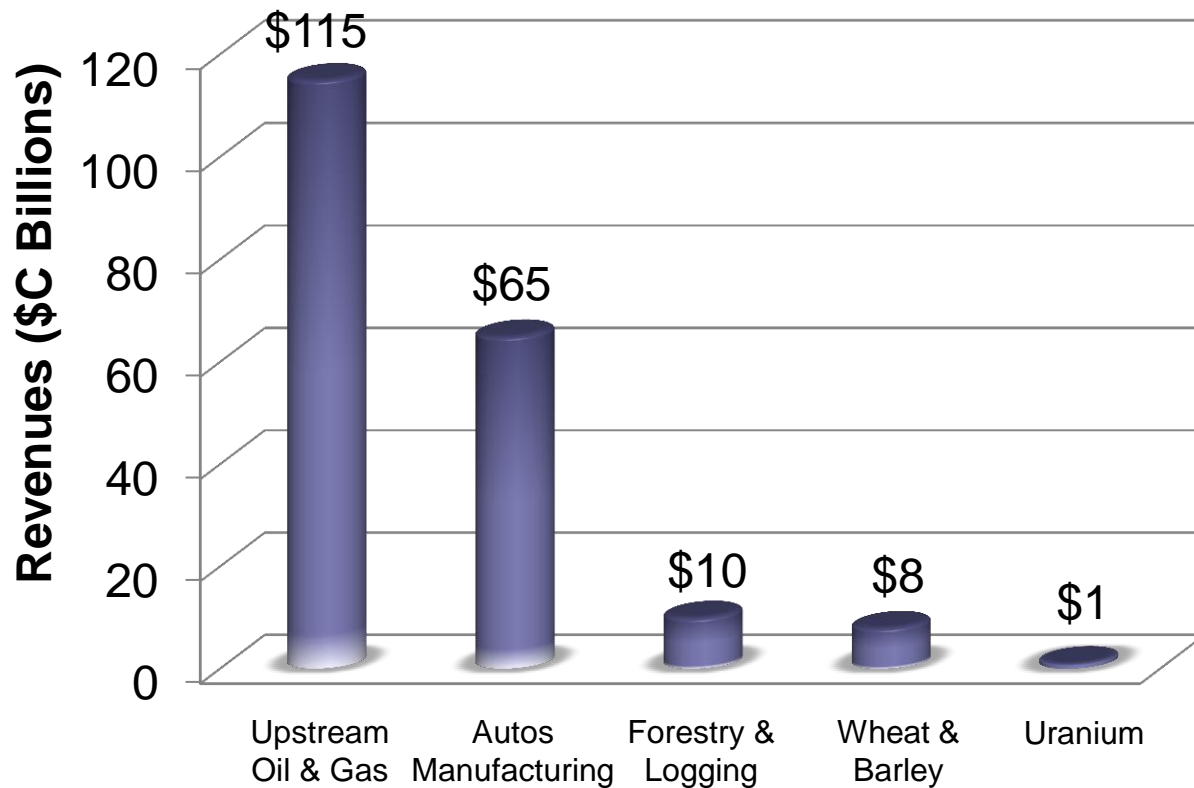
## Oil Reserves – Driving Alberta's Economy



Source: CAPP May 2011

# The Opportunity

## Impact of Oil and Gas Industry

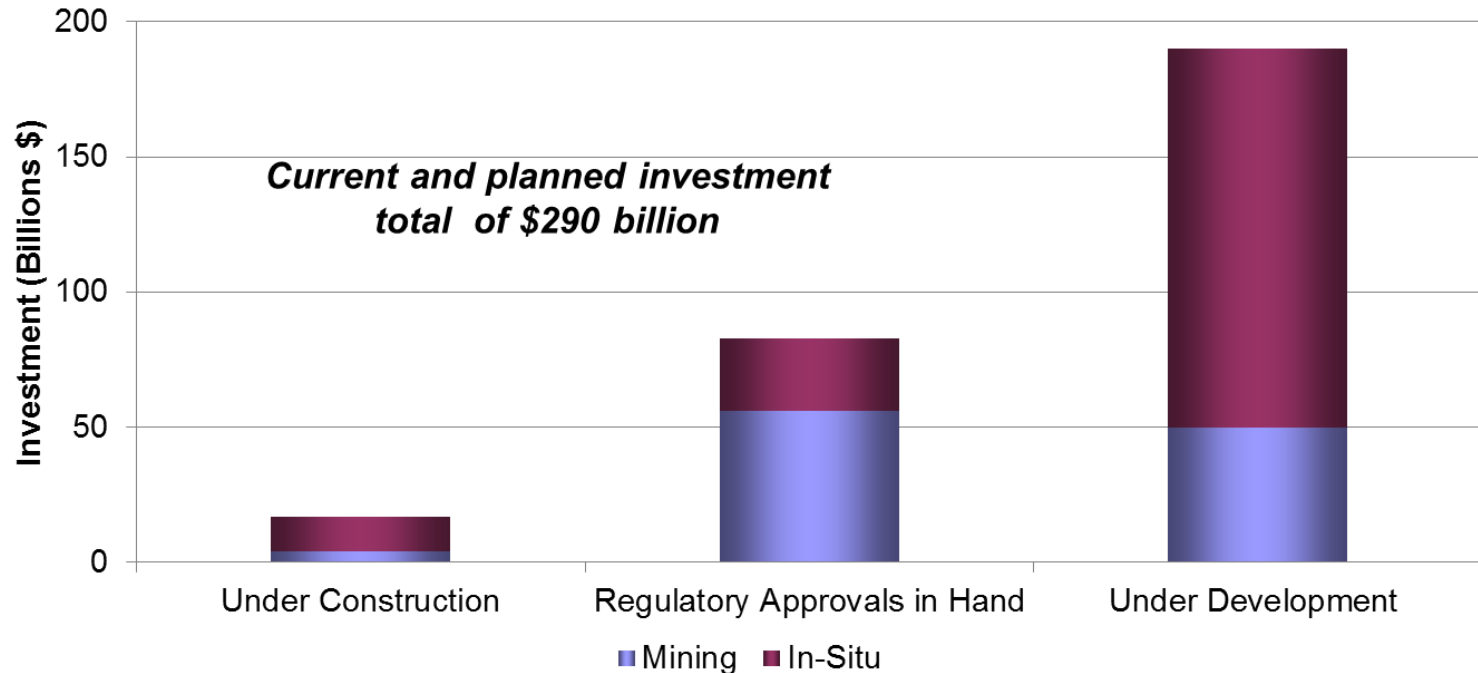


Source: Statistics Canada, CAPP, Canadian Wheat Board, Natural Resources Canada, Canadian Nuclear Association, ARC Financial Corp.

# The Opportunity

## Expected Investment

### Current and Planned Oil Sands Investment



Source: Oil Sands Developers Group, March 2011

## Calgary



- Population of 1.4 million people
- Proliferation of international banks in Calgary
- Canada (largely Calgary) finances 15% of global oil and gas production Canada produces only 5% of total global production
- Toronto Stock Exchange Venture Exchange
- Calgary leads the country in economic growth and job creation
- Key Sectors: energy, finance, professional services, logistics



## Strategic Location

- Western Canada's business centre
  - 123 head offices in Calgary
- Western Canada's distribution hub
  - Highway 1 and Canamex
  - Canadian Pacific Railway and Canadian National Railway
  - Calgary International Airport has connections to 100 destinations
- 50 million people accessible by ground transportation within 24 hours



## Calgary demographics



- Median age is 35.8 with 78.8 per cent aged 18 and older; 59.2 per cent of Calgarians are within core working age group of 25 – 64 (2010)
- 23.6 per cent of Calgarians are immigrants, and 1.1 per cent of Calgarians are non-permanent residents
- 22.2 per cent of population is a visible minority with Chinese and South Asians leading
- Median total income 2009 – \$88,410 (all Census families)
- Average household size – 2.6 people
- Second highest level of educational attainment of population aged 25 – 64 of major Canadian cities (after Ottawa)



# The Opportunity

## Edmonton

- Capital city of Alberta
- Metro population of 1.1 million, and the 2<sup>nd</sup> fastest-growing metro area in Canada.
- Highly skilled and educated workforce
- One of Canada's most diversified and fastest growing economies
- Industrial and manufacturing centre for Alberta's oil and gas industry
- Home to nine Universities and Colleges
- A Canadian leader in Healthcare, Education, Nanotechnology & Advanced Technologies, Oil & Petrochemicals, Financial Services



# The Opportunity

## Edmonton

### Heavy Oil and Petrochemicals

- Global leader in research, manufacturing and service for the heavy oil sector
- Expecting strong growth in petrochemical and related sectors

### Health

- Canada's Health Care Capital
- Global Leader in Cardiac, Virology, Diabetes and Cancer Research





# The Opportunity

## Edmonton

### Education

- University of Alberta – Top 20 by 2020, Over \$520 Million in R&D spending
- NAIT – 87,000 students, graduates nearly 20% of Canada's apprentices

### Advanced Technologies

- National Institute of Nanotechnology
- Leader in Energy Research – Syncrude and Schlumberger Global Research

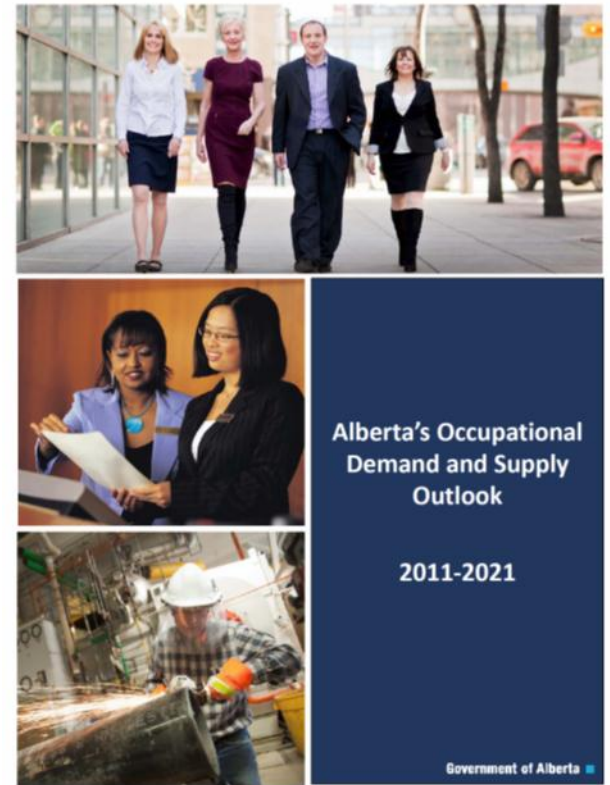
### Financial Services and Investment Management

- \$135 Billion worth of assets under management in Edmonton

# Challenges

## Work Force and Labour

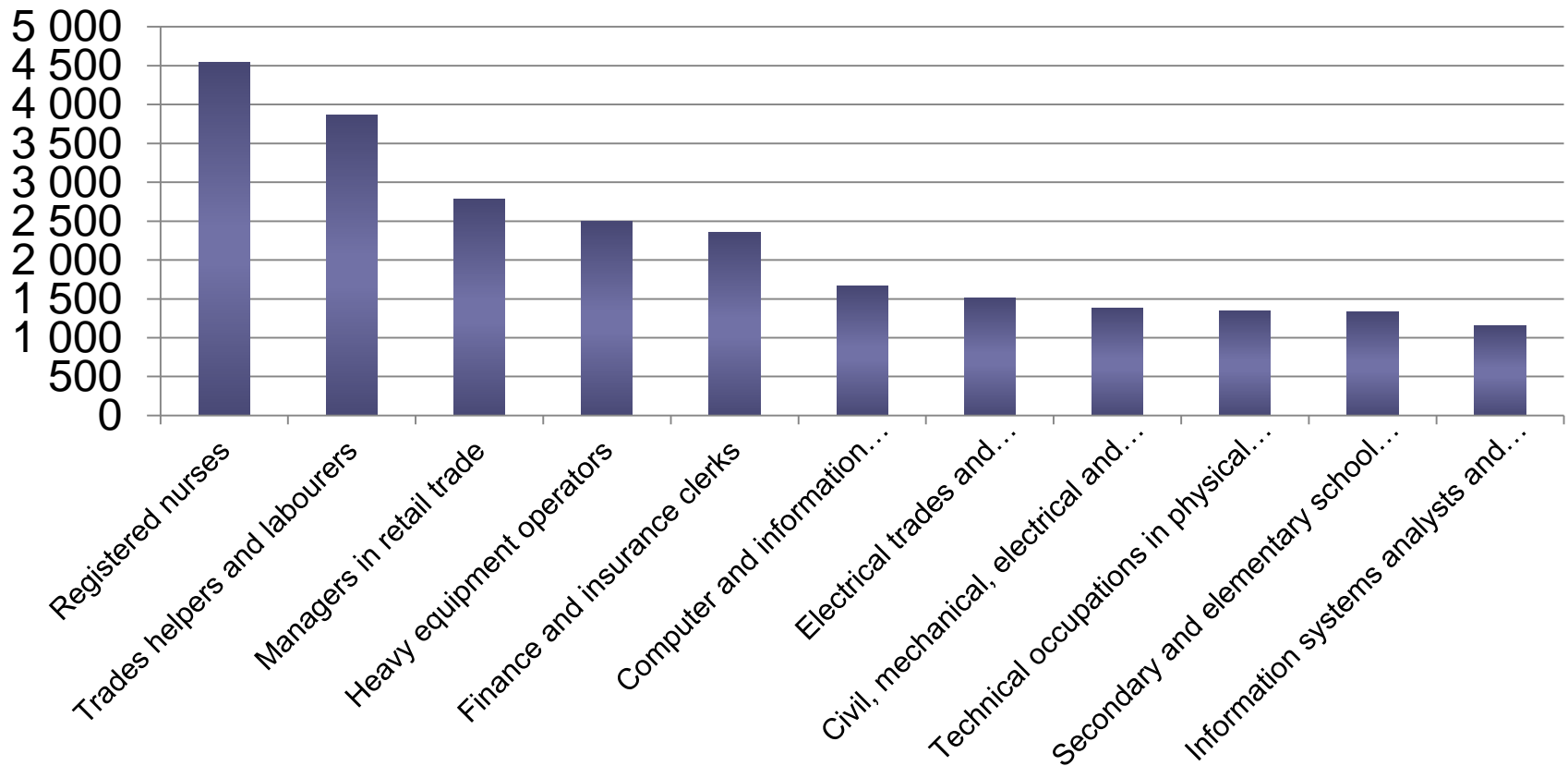
- Alberta facing serious labour shortages
  - Forecasting a shortage of 114,000 jobs over the next decade
  - Already being experienced in a number of key professions and trades
- Supporting both intra-provincial and international immigration
  - Including Temporary Worker programs



# Challenges

## Alberta Labour Shortages in Key Occupations

Total Shortage 2011-2021



# Challenges

## Transportation and Distribution

- Alberta's economic success heavily dependent on effective transportation links
  - Roads, rails & airports
  - logistics hubs
- Heavy oil production expected to double by 2020
  - need additional pipeline capacity to accommodate increased production





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# Challenges

## Industrial Capacity

- Current and projected levels of demand significantly exceed Alberta's industrial capacity
- Not realistic to create required industrial capacity
  - Limits to growth
  - Avoid planning for the peak
- Encouraging partnerships between Alberta firms and companies across Canada

# Challenges

## Environmental Issues

- Both industry and government placing a high priority on protection of environment
  - Increasingly strict regulatory regime
  - Alberta a global leader in key areas of environmental research
- Alberta is a receptive market for environmental solutions from across Canada and globally

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# Challenges

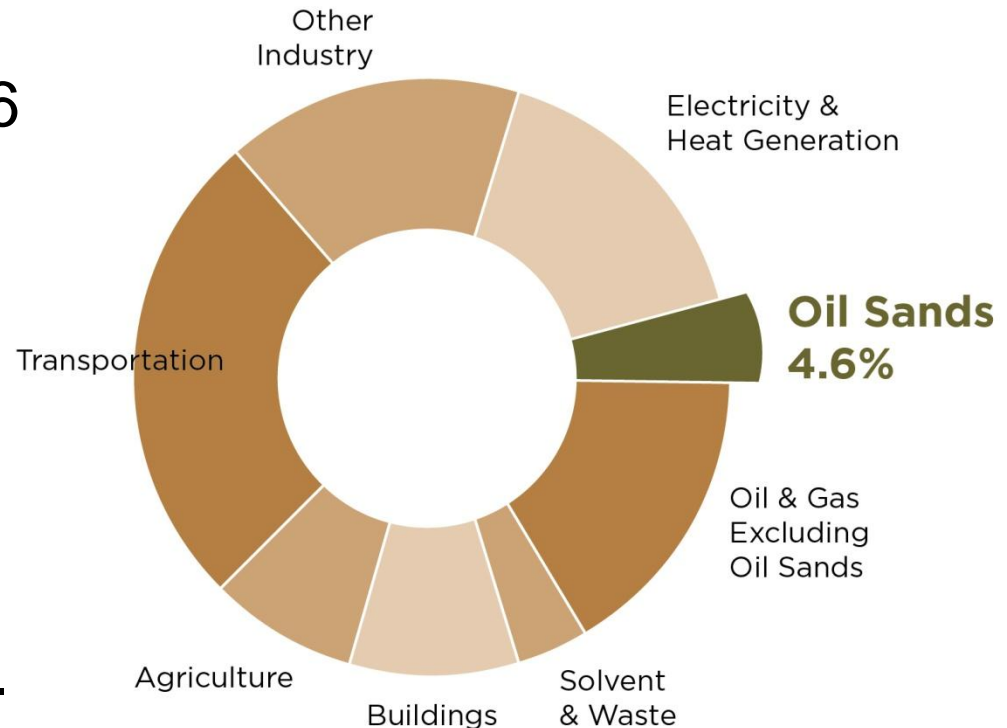
## Public Perception

- Majority of Albertans would like to see province's economic success shared with the rest of Canada
  - Industrial strategy
  - Creating jobs
  - Transfer payments
- Canadian energy strategy

# Challenges

## Public Perception

- Oil Sands account for 4.6 per cent of Canada's GHG emissions – Canada accounts for 5 per cent of global GHG emissions
- 1/1000th of the world's total emissions – approx. 70 per cent of Canada's crude oil requirements

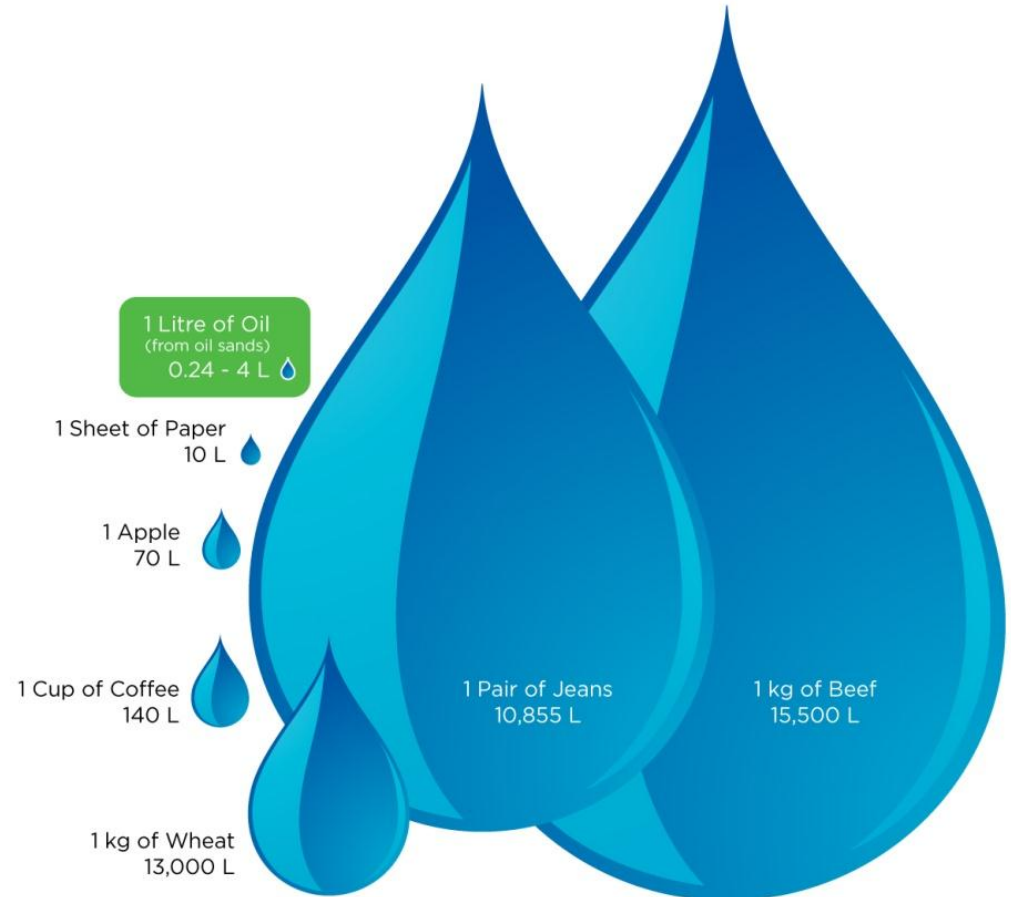


Source: Environment Canada

# Challenges

## Public Perception

- Oil Sands Water Footprint Is Efficient



Source: <http://www.waterfootprint.org>

# Working Together

- Consider Canada Cities Alliance
- Local Presence
- Procurement
- Labour
- Industrial Support

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### Consider Canada's large cities for global trade and investment

The majority of the trade and investment opportunity flows through the world's cities. That's why Canada's large cities are working together to help international companies like yours determine the best synergies for business expansion by building city-to-city linkages around the globe.

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\*Source of economic and trade statistics: UNCTAD.org and Invest in Canada Register report 2010. Foreign and International Trade Canada. Visit: investincanada.gc.ca

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### Commerce et investissements internationaux : Les grandes agglomérations canadiennes restent en tête

La plupart des débouchés commerciaux et des possibilités d'investissement convergent vers les villes du monde. C'est la raison pour laquelle les grandes agglomérations canadiennes se concertent pour attirer les entreprises internationales comme la vôtre à l'aide des liens avec les villes du monde dans le but de créer des synergies optimales pour l'expansion de vos activités.

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about an hour ago

@VancEconomic  
Promoting Vancouver as a business destination. http://bit.ly/1020Ugmyr

\*Source: UNCTAD.org et l'Index Global de la Provision de l'Investissement (GPI) 2009. Offense Stratégique de Commerce International Canada. Visite: investincanada.gc.ca

Invest in Canada  
Invest in Ontario  
Invest in Quebec  
Invest in Alberta  
Invest in Saskatchewan  
Invest in Manitoba  
Invest in Newfoundland and Labrador  
Invest in Yukon, Northwest Territories and Nunavut

# Oil Sands Contributions In Quebec

Between 2010-2035,  
Alberta's oil sands  
development will:

- Contribute \$13.8 billion to Quebec's GDP
- Employees from Quebec will earn \$7.7 billion
- Generate 208,000 person years for Quebec's residents.



*Source: Canadian Energy Research Institute, Economic Impacts of New Oils Sands Projects. May, 2011*

# Environmental Innovation

## Wanted...

- Managing GHG emissions
- Reducing water use
- Improving reclamation times and techniques



**Syncrude Buffalo Graze On Reclaimed Land**



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# How we can help you

- Business to Business Match-Up Services
- Identification of Opportunity
- Site Selection and Real Estate Assessments
- Economic Forecast Reports
- Assistance with regulatory challenges and procedures

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# Working with the World

We would be pleased to assist you in participating in Alberta Opportunities.

Please contact:

## **Calgary Economic Development**

Bruce Graham

Email [bgraham@calgaryeconomicdevelopment.com](mailto:bgraham@calgaryeconomicdevelopment.com) |

Tel 403-221-7833

[www.calgaryeconomicdevelopment.com](http://www.calgaryeconomicdevelopment.com)

## **Edmonton Economic Development Corporation**

Ron Gilbertson

Email [rgilbertson@edmonton.com](mailto:rgilbertson@edmonton.com) | Tel 780-917-7601

[www.edmonton.com](http://www.edmonton.com)

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