# Our Communities Care
# British Columbia's Natural Gas and Oil
# Supply Chain and Community Investment Study 2018-2021

TECHNICAL REPORT

January 13, 2023

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# TABLE OF CONTENTS

## INTRODUCTION

iTOTEM Analytics is pleased to submit to the Canadian Association of Petroleum Producers (CAPP) the inaugural Province of British Columbia (B.C.) Upstream Natural Gas and Oil Supply Chain and Community Investment report, named **Our Communities Care.**

As Indigenous communities and municipalities focus on the challenges associated with pandemic recovery and climate change, CAPP recognizes the importance of profiling the businesses working each day to support climate transition and economic development.

**Our Communities Care** is an invitation for British Columbians to learn more about the Indigenous and local businesses and organizations who work daily to make B.C.'s upstream natural gas and oil industry one of the safest, least carbon intensive and most stringently regulated energy sectors in the world. The natural gas and oil supply chain in British Columbia is critical to Canada's ability to meet the growing demand for responsibly produced affordable energy both at home and globally.

Branded **Our Communities Care** (OCC) is a recognition that B.C.'s world-class natural gas resource is stewarded by Indigenous Nations and municipalities, in every region of the province, from an energy-efficiency combustion engineering firm in Victoria to an environmental planning consultant in Nelson, to a metal fabricator in Parksville, to an Indigenous-owned earthworks supplier in Wonowon, to a construction company in Kitimat. Your neighbours and friends most likely work in the industry, either directly or indirectly.

Incubating and supporting businesses in B.C.'s natural gas and oil sector promotes a viable energy transition with durable jobs and the business opportunities necessary to spur the innovations and climate solutions required to advance decarbonization. Importantly, a healthy Indigenous and local natural gas and oil supply chain supports reconciliation and backstops B.C.'s economic recovery.

**OCC** was a ten-month study conducted through December 2021 to September 2022. Aligned with the best practices in Indigenous and local content reporting, as expressed by the ambitions of the '***Mining Shared Value - Local Procurement Reporting Mechanism'*** and the ***'National Indigenous Economic Strategy for Canada'***, CAPP members provided iTOTEM with all data on procurement transactions between 2018-2021. Goods, materials, and services purchased from B.C.-based businesses working in the upstream operations of the B.C. natural gas and oil sector were included. The study's findings captured 100% of the annual B.C. upstream capital and operating budgets of CAPP members participating in OCC, which represented roughly 90% of natural gas production in the province at the time[1].

## Project Objectives

The objectives of the OCC project included:

1. To discover the provincial and regional economic impact of natural gas development through supply chain expenditures;
2. To gain a better understanding of the variety of suppliers, including Indigenous-affiliated, supporting the natural gas sector, and their geographic distribution;
3. To report on the community investment contributions made; and
4. To test the effectiveness of a new methodology of supply chain data collection from a cross sectional representation of natural gas producers.

[1] The upstream industry expenditures did not include large diameter transmission pipelines, LNG facilities, refineries, or other downstream segments of the natural gas and oil value chain.

# KEY FINDINGS

The key findings of the **OCC** study are grouped into the following themes:

1. Geographic reach of the upstream natural gas and oil supply chain in B.C.
2. Economic impact by business type
3. Indigenous participation in the natural gas and oil supply chain
4. The supply chain benefits of reclamation-related activities
5. Community investment contributions

## Geographic Reach

- OCC captured **$4.7B**[2] worth of expenditures spent on goods, materials, and services on B.C. natural gas operations with more than **2400 B.C.-based suppliers,** located or affiliated with **some 140 B.C.** municipalities and Indigenous Nations .
- From 2018 to 2021, the annual B.C. supply chain reported by each OCC participant ranged from **$33M to $430M.** During the period 2018 to 2021, the median annual expenditure reported was **$163M,** and the mean annual expenditure was **$168M** among all participating members.
- From 2018 to 2021, each OCC company contracted with **400 businesses** on average.
- Fort St. John had the most supply chain benefits from B.C.'s natural gas and oil sector, accounting for **52%** of total supply chain expenditures reported by OCC participants between 2018 and 2021.
- Notably, the natural gas sector supply chain had a significant impact on urban British Columbia. Expenditures by OCC companies with operations in Metro Vancouver increased by **25%** between 2018 and 2021.
- The **top ten municipalities** in terms of supply chain spending were:

1. Fort St. John
2. Dawson Creek
3. Pouce Coupe
4. Vancouver
5. Wonowon
6. Charlie Lake
7. Prince George
8. Rolla
9. Creston
10. Fort Nelson

[2] In scope was an analysis of B.C.-based suppliers who provide goods, materials, and services to B.C.'s upstream natural gas and oil operations. In total, B.C. natural gas producers invested approximately $13.4 billion into the Canadian supply chain during the reporting period.

The **top ten** municipalities with the greatest number of businesses involved in the natural gas supply chain were:

1. Fort St. John
2. Dawson Creek
3. Vancouver
4. Charlie Lake
5. Fort Nelson
6. Chetwynd
7. Prince George
8. Surrey
9. Taylor
10. Pouce Coupe

## Economic Impact by Business Type

- OCC participants submitted company cost codes used to categorize their B.C. supply chain.
- More than 3000 cost codes were filed.
- Four main categories and 17 subcategories were established to standardize the description of the goods, materials and services offered by contracted businesses.
- Each vendor was sorted into one or more of these categories, based on the cost code submitted with each transaction.
- See Appendix A for a description of the categorization methodology.
- The supply chain master category with the highest expenditure between 2018 and 2021 was **Parts, Equipment, and Capital Assets. Construction companies** made up **11% of the vendor count** reported by OCC, but these businesses accounted for **nearly 22%** of the total expenditures in OCC.
- The average annual expenditure on construction-related services reported was **$260M.**
- The second and third subcategories with the most expenditures were **Equipment Services / Maintenance** and **Drilling / Completion / Downhole Services** with a respective average annual procurement of $195M and $176M per instance.
- Despite the fact that **Fort St. John** led in almost all supply chain expenditure categories, some goods, materials, and services were also prominent in other communities. For example, the study discovered that **Vancouver** outperforms other municipalities in terms of **chemical suppliers** to industry. In **Dawson Creek, health and safety services** had a high level of supply chain participation.

## Indigenous Participation

- Aligned with the Government of B.C.'s commitment in the ***Declaration on the Rights of Indigenous Peoples Act (DRIPA) Action Plan*** to '*create opportunities for Indigenous people to be full partners in the economy*', the B.C. natural gas sector spent ~**$540M with some 100 B.C.-based Indigenous-affiliated businesses and organizations between 2018-2021.**
- The B.C. Assembly of First Nations' **Northeast Region** had the largest count and spend of Indigenous-affiliated vendors, while the **Lower Mainland Southwest Region** had the second highest count and spend in B.C.'s natural gas industry.
- **4% of the businesses engaged** in B.C. natural gas sector were **Indigenous affiliated;** whereas **Indigenous-affiliated vendors represented 11.5%** of B.C.'s total **supply chain spend**.
- By 2021, the annual amount of supply chain expenditure with Indigenous-affiliated businesses **increased by 148% over 2018** expenditures; similarly, the proportion of B.C.'s total natural gas supply chain expenditures attributable to Indigenous-affiliated supply chain spend increased from **6.4% in 2018 to 14.6% in 2021**. *For comparison, Public Services and Procurement Canada (PSPC), Indigenous Services Canada (ISC) and the Treasury Board of Canada Secretariat (TBS), are striving for a minimum of 5% of the total value of public contracts be held by Indigenous vendors[3], effective 2024.*
- The OCC also reported on the different types of Indigenous-affiliated businesses operating in the natural gas sector. Notably, **Indigenous-affiliated vendors provided all 17 goods**, materials, and services available to OCC participants. As with the provincial supply chain distribution, the **Consumables, Utilities and Logistics** category overperformed. But overall, the **Equipment Services / Maintenance subcategory**, overperformed in terms of expenditure earned by Indigenous-affiliated businesses in B.C.
- Overall, **7%** of B.C **Consumables, Utilities and Logistics** companies were Indigenous-affiliated. Yet, these **Indigenous-affiliated companies** represented **approximately 23%** of the total **Consumables, Utilities and Logistics** category **expenditure** in B.C.

[3] Definition: Indigenous peoples own and control at least 51% of the enterprise, or for joint ventures, eligible Indigenous businesses can partner with non-Indigenous businesses. It must be demonstrated that 33% of the value of the work performed under the contract will be performed by the Indigenous business. Source: https://www.sac-isc.gc.ca/eng/1617820318610/1617820524323#a1

## Reclamation-related Activities

Reclamation and remediation activities were reported by all OCC participants.

- Approximately **$260M** in expenditures were reported for reclamation and remediation activities in B.C. between 2018-2021.
- An estimated **280 businesses** were contracted to support reclamation and remediation services
- **11%** of these businesses were **Indigenous-affiliated.**

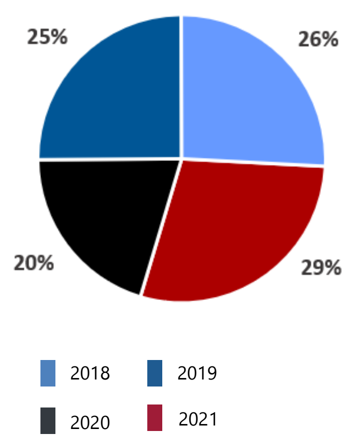
## Community Investment Contributions

- OCC participants also reported contributing approximately **$16.8M** in community investments between 2018-2021.
- Sponsorships, donations, and in-kind contributions supported more than **350 organizations** in over **25 municipalities and Indigenous Nations** across B.C. between 2018 to 2021.
- Approximately **$13M** was made in community investments with **Indigenous Nations or affiliated organizations.**

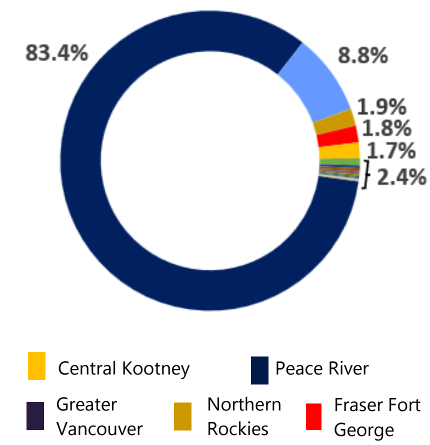
# PROVINCE OF B.C. SUPPLY CHAIN BENEFITS AND CONTRIBUTIONS BETWEEN 2018-2021

**Total Supply Chain Spend on B.C. Operations with B.C. Businesses 2018 – 2021: $4.7B**

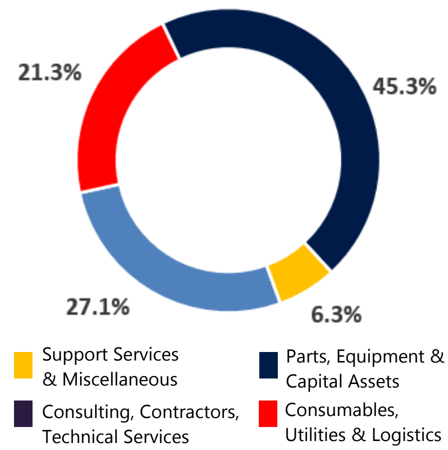
**% Allocation by Year**




**% Allocation by B.C. Regional District**




**% Allocation by Master Category**




Note: An amount of $257M is excluded as non-supply chain spend. This exclusion consists of taxes, fees and levies, and other internal expenses. Community Investments is reported separately.

## Supply Chain

**~2400**
**B.C.-based businesses**

**~100**
**B.C.-based Indigenous-affiliated businesses**

**~140**
**Municipalities and Indigenous Nations associated associated with supply chain**

## Contributions

**~280**
**B.C.-based businesses active on reclamation-related activities**

**~350**
**B.C. organization benefitting from community investments**

**$16.8M**
**Community investment contributions in B.C.**

# SECTION ONE

THE GEOGRAPHIC REACH OF THE NATURAL GAS SECTOR SUPPLY CHAIN IN B.C.

## SECTION ONE: THE GEOGRAPHIC REACH OF CAPP'S SUPPLY CHAIN

### Section Description

The geographic reach of CAPP's supply chain was evaluated:

- Province-wide
- By Municipality

### Key Insights

- More than **~ $4.7B** of materials, goods and services were procured from ~ 2400 businesses located or affiliated with **~ 140 municipalities**, unincorporated communities and **Indigenous Nations** in B.C. between 2018-2021 by OCC companies.
- On an average **400** businesses were contracted annually by each OCC company from 2018 to 2021.
- **Fort St. John** had the **greatest number of businesses** active in B.C. natural gas operations. Fort St. John was also the municipality with the **greatest supply chain spend**.
- Notably, the natural gas sector supply chain also had significant impact on urban B.C. Expenditures made by OCC companies with businesses based in **metro Vancouver** increased by **25%** between 2018-2021.

## 1.1 PROVINCE-WIDE IMPACT OF B.C. OPERATIONS

More than 2400 businesses located in some 140 Municipalities and Indigenous Nations provided ~$4.7B of goods, materials and services to the natural gas sector between 2018 - 2021.

| SUPPLY CHAIN SUMMARY | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|
| TOTAL SUPPLY CHAIN SPEND ON B.C.-BASED BUSINESSES | $ 1.25B | $ 1.17B | $ 943M | $ 1.3B |
| NUMBER OF B.C.-BASED BUSINESSES ACTIVE | 1,670 | 1,650 | 1,565 | 1,600 |

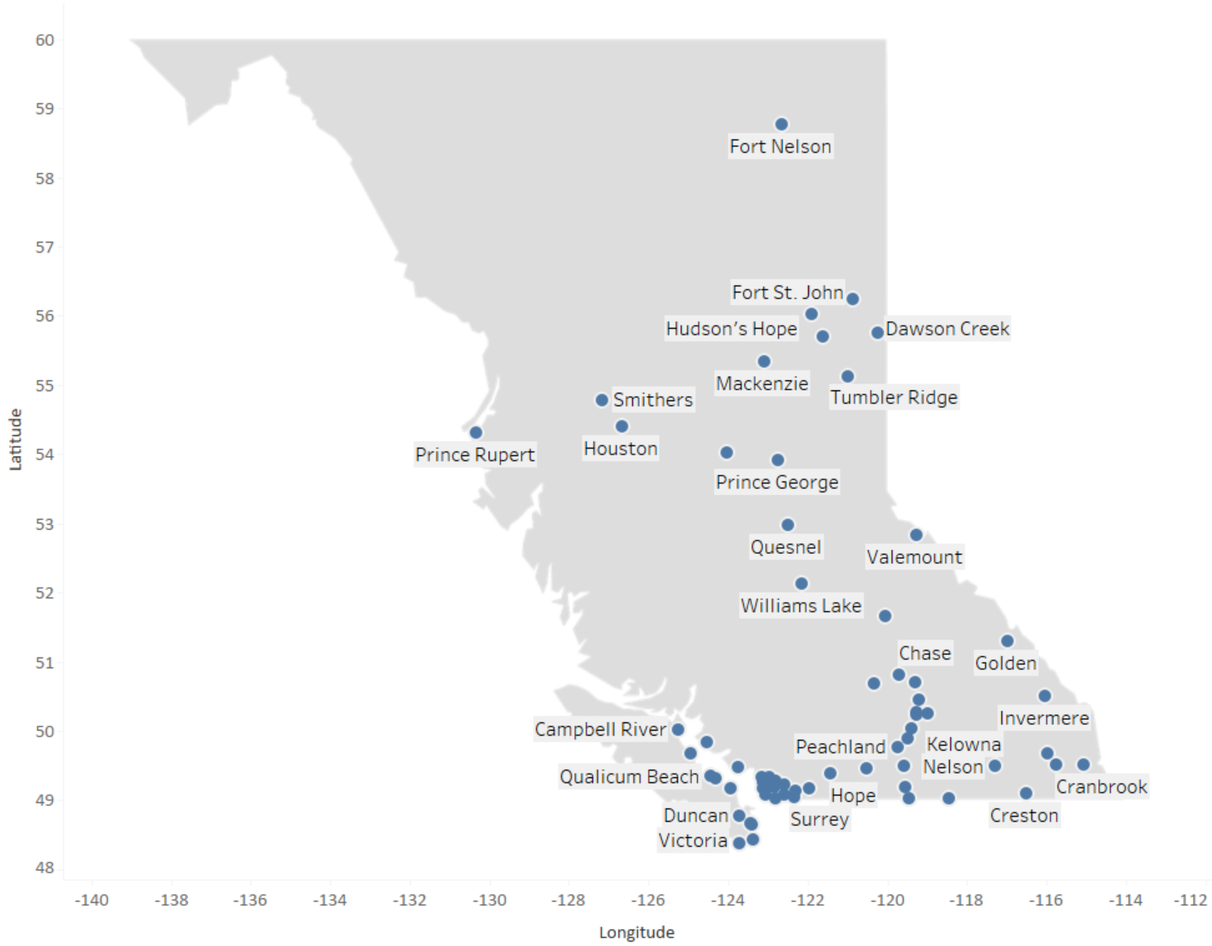
The table below shows the change in spend and count in the upstream sector year over year between 2018-2021, and the percentage change over four years.

| SUPPLY CHAIN TRENDS | CHANGE OVER TIME | | | |
|---|---|---|---|---|
| | 2018 TO 2019 | 2019 TO 2020 | 2020 TO 2021 | 2018 TO 2021 |
| ANNUAL CHANGE IN SUPPLY CHAIN SPEND | Decline of $ 84M (-6.7%) | Decline of $ 223M (-19%) | Rise of $ 397M (+42%) | Rise of $ 90M (+7.2%) |
| ANNUAL CHANGE IN NUMBER OF VENDORS | Decline of 19 (-1%) | Decline of 86 (-51%) | Rise of 34 (2%) | Decline of 71 (-4.1%) |

Note: the annualized increase/decrease is shown, as well as the increase/decrease between the beginning of the reporting period in 2018 to the end in 2021.

Shown on the next page is a heat map representing the number of businesses province-wide, by municipality, which provided goods, materials and services to B.C.'s upstream natural gas and oil sector.

## THE SUPPLY CHAIN IMPACT HAS A PROVINCE-WIDE FOOTPRINT




- The municipality of Fort St. John led B.C. supply chain activities in terms of spend ($2.5B), as well as count of businesses engaged (~870). Other municipalities which served as hubs for B.C.'s natural gas sector's supply chain activities between 2018-2021 were Dawson Creek, Pouce Coupe, and Vancouver.

## 1.2 SUPPLY CHAIN TOP 10

OCC considered the supply chain impact province-wide based on:

- The dollar value spent on the supply chain by municipality; and,
- The number and types of businesses by municipality.

The top 10 municipalities with the most supply chain spend, and the municipalities with the greatest number of natural gas supply chain businesses are presented below.

### B.C. MUNICIPALITIES WITH THE GREATEST SUPPLY CHAIN SPEND

| MUNICIPALITY | SPEND |
|---|---|
| FORT ST. JOHN | $ 2.5B |
| DAWSON CREEK | $ 632M |
| POUCE COUPE | $ 408M |
| VANCOUVER | $ 337M |
| WONOWON | $ 132M |
| CHARLIE LAKE | $ 120M |
| PRINCE GEORGE | $ 83M |
| ROLLA | $ 78M |
| CRESTON | $ 77M |
| FORT NELSON | $ 40M |

All values are approximate.

### B.C. MUNICIPALITIES WITH THE GREATEST NUMBER OF BUSINESSES

| MUNICIPALITY | SUPPLIER COUNT |
|---|---|
| FORT ST. JOHN | 870 |
| DAWSON CREEK | 440 |
| VANCOUVER | 120 |
| CHARLIE LAKE | 110 |
| FORT NELSON | 100 |
| CHETWYND | 55 |
| PRINCE GEORGE | 50 |
| SURREY | 40 |
| TAYLOR | 40 |
| POUCE COUPE | 40 |

All values are approximate. See **Appendix A** for a complete list of municipalities with the greatest number of vendors and the most supply chain spend.

# SECTION TWO

SUPPLY CHAIN IMPACT BY GOOD, MATERIAL AND SERVICE TYPE

# SECTION TWO: SUPPLY CHAIN IMPACT BY GOOD, MATERIAL AND SERVICE TYPE

## Section Description

- To contextualize the impact of the natural gas sector on the B.C. economy, the categories of goods, materials and services accessed were studied.
- OCC grouped businesses into standardized categories to analyze the expenditures and counts by supply chain category.

## Key Insights

- The **'Construction'** subcategory was the **highest expenditure category** between 2018-2021.
- **'Equipment Services/ Maintenance'** subcategory **had the most businesses** providing goods, materials and services to OCC companies, with some 1100 businesses active.
- **Fort St. John** had the most businesses representing **all categories of goods, materials and services** procured between 2018-2021.
- Similarly, **Dawson Creek, Vancouver, Charlie Lake, Fort Nelson** made the top five list by having the **greatest number of vendors** representing the **most categories of goods, businesses and services** accessed by OCC companies; this shows that these localities have a developed natural gas service sector.

## 2.1 SUPPLY CHAIN BY EXPENSE CATEGORY

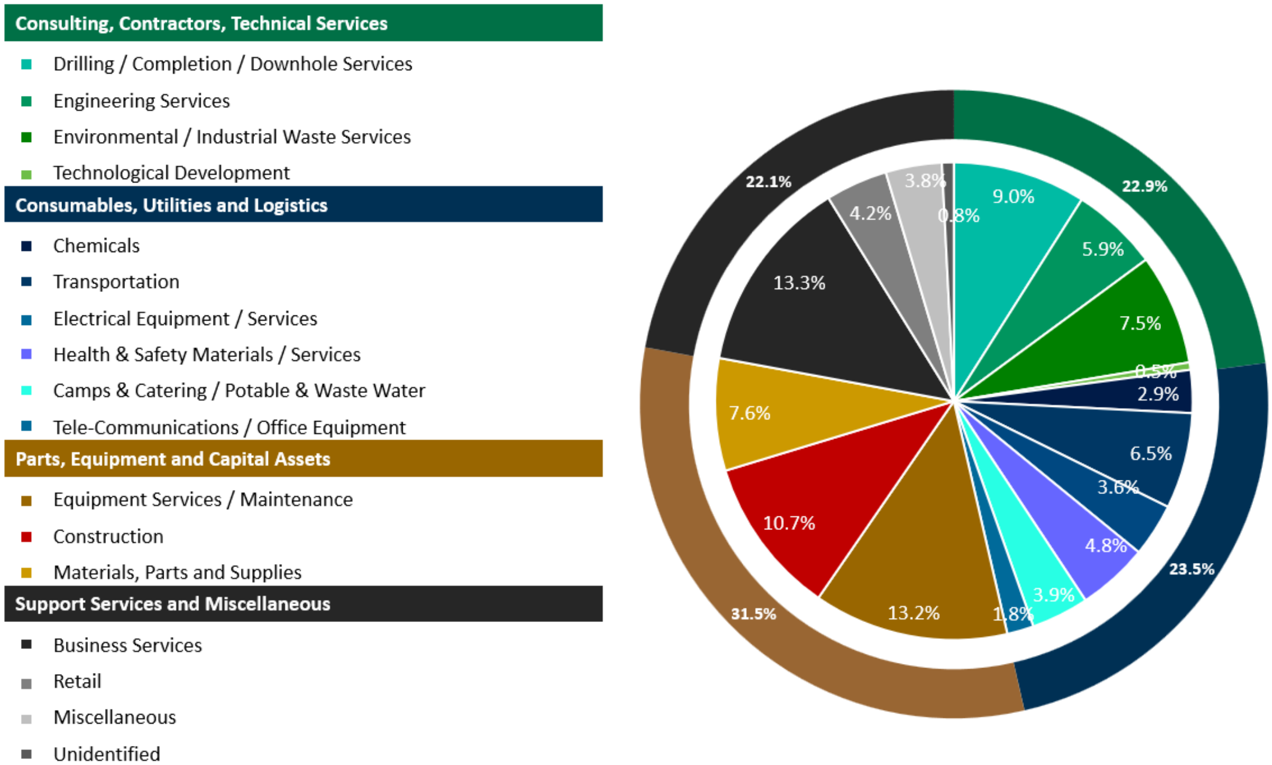
The study grouped spends made by the natural gas sector by supply chain category to demonstrate the economic impact of the industry between 2018-2021.

| MASTER CATEGORY | SUBCATEGORY | SPEND |
|---|---|---|
| **CONSULTING, CONTRACTORS, TECHNICAL SERVICES** | Drilling / Completion / Downhole Services | $ 705M |
| | Engineering Services | $ 233M |
| | Environmental / Industrial Waste Services | $ 336M |
| | Technological Development | $ 3M |
| | **SUBTOTAL** | **$ 1.3B** |
| **CONSUMABLES, UTILITIES AND LOGISTICS** | Camps and Catering / Potable and Wastewater | $ 110M |
| | Chemicals | $ 187M |
| | Electrical Equipment / Services | $ 224M |
| | Health and Safety Materials / Services | $ 84M |
| | Telecommunications / Office Equipment | $ 11M |
| | Transportation | $ 384M |
| | **SUBTOTAL** | **$ 1.0B** |
| **PARTS, EQUIPMENT AND CAPITAL ASSETS** | Construction | $ 1.0B |
| | Equipment Services / Maintenance | $ 778M |
| | Materials, Parts and Supplies | $ 313M |
| | **SUBTOTAL** | **$ 2.1B** |
| **SUPPORT SERVICES AND MISCELLANEOUS** | Business Services | $ 105M |
| | Retail | $ 13M |
| | Miscellaneous | $ 118M |
| | Unidentified | $ 53M |
| | **SUBTOTAL** | **$ 290M** |
| **GRAND TOTAL** | | **$ 4.7B** |

See **Assumptions and Parameters** for a description of the categorization methodologies.

The pie chart below represents the count of businesses based on the different goods, materials and service categories in in B.C.'s natural gas supply chain. A supplier can also serve more than one category.

## CATEGORIES OF BUSINESS




See **Assumptions and Parameters** in Appendix C for a description of the categorization methodologies.

## 2.2 DISTRIBUTION OF EXPENDITURES BASED ON THE TOP FOUR MUNICIPALITIES

Shown below is the distribution of spend based on the municipalities with greatest supply chain expenditures.

| | | Final City | | | |
|---|---|---|---|---|---|
| Master Category | Expense Category | Dawson Creek | Fort St. John | Pouce Coupe | Vancouver |
| Consulting, Contractors, Technical Services | Total | 21.59% | 70.06% | 1.62% | 6.74% |
| | Drilling / Completion / Downhole Services | 22.13% | 75.76% | 0.06% | 2.05% |
| | Engineering Services | 24.43% | 69.41% | 0.03% | 6.13% |
| | Environmental / Industrial Waste Services | 18.02% | 56.64% | 6.77% | 18.58% |
| | Technological Development | 1.38% | 97.38% | | 1.24% |
| Consumables, Utilities and Logistics | Total | 13.17% | 61.24% | 1.76% | 23.84% |
| | Camps & Catering / Potable & Waste Water | 13.56% | 83.63% | 0.01% | 2.80% |
| | Chemicals | 6.67% | 51.64% | 0.73% | 40.95% |
| | Electrical Equipment / Services | 4.44% | 52.55% | | 43.00% |
| | Health & Safety Materials / Services | 26.86% | 63.81% | 0.28% | 9.05% |
| | Tele-Communications / Office Equipment | 17.88% | 34.55% | 0.12% | 47.45% |
| | Transportation | 20.12% | 72.14% | 4.44% | 3.30% |
| Parts, Equipment & Capital Assets | Total | 15.48% | 59.56% | 21.54% | 3.42% |
| | Construction | 10.22% | 41.01% | 43.04% | 5.73% |
| | Equipment Services / Maintenance | 16.96% | 81.44% | 0.09% | 1.50% |
| | Materials, Parts and Supplies | 30.91% | 67.42% | 1.47% | 0.20% |
| Support Services & Miscellaneous | Total | 14.51% | 74.94% | 1.99% | 8.55% |
| | Business Services | 19.35% | 68.25% | 0.48% | 11.91% |
| | Miscellaneous | 13.92% | 83.55% | 0.08% | 2.45% |
| | Retail | 18.77% | 80.28% | 0.06% | 0.90% |
| | Unidentified | 0.20% | 54.83% | 16.09% | 28.88% |

Note: the percentages of expenditure shown by master category and subcategory are based on the top four municipalities only. See **Appendix B** for a more detailed list of the top municipalities with the most expenditures in each category.

# SECTION THREE

INDIGENOUS PARTICIPATION

## SECTION THREE: INDIGENOUS PARTICIPATION

### Section Description

The section addresses Indigenous-affiliated business participation.

### Key Insights

- Approximately **$765M was spent between 2018-2021** in B.C.'s natural gas supply chain with **135 Indigenous-affiliated businesses from across Canada**.
- Approximately **$540M was spent with** some **100 B.C.-based Indigenous-affiliated businesses between 2018-2021,** which is **equivalent to 11.5% of B.C.'s total natural gas supply chain expenditures** during that period, as reported by OCC companies.
- By 2021, **the annual amount of supply chain expenditure with Indigenous-affiliated businesses increased by 148% over 2018 expenditures**; similarly, Indigenous-affiliated supply chain spend, as a proportion of B.C.'s total natural gas supply chain expenditures, increased from 6.4% in 2018, to 14.6% in 2021 respectively.
- The count of B.C.-based Indigenous-affiliated businesses, as a percentage of the total B.C. supply chain increased marginally from 4.6% in 2018, to 5.5% in 2021. The overall increase in the count of Indigenous-affiliated vendors in B.C. stood at 14% by 2021.
- **Fort St. John** reported having the most Indigenous-affiliated businesses, with **~50 businesses** being engaged by OCC companies. These **Indigenous-affiliated vendors earned some $350M,** which is more than **60% of Indigenous-affiliated** expenditures in B.C. between 2018-2021.
- Indigenous-affiliated businesses offered services in all **17-supply chain subcategories.**
- By count, '**Equipment Services / Maintenance'** had the **most Indigenous-affiliated businesses.** In addition, this category also was the category with the **greatest expenditures** made with Indigenous-affiliated businesses.
- The second most prominent supply chain category with Indigenous-affiliated businesses, by **spend and count**, was **'Construction'.**

## 3.1 INDIGENOUS SUPPLY CHAIN

### INDIGENOUS-AFFILIATED SPEND, VENDOR COUNT AND PERCENTAGE CHANGE

- By 2021, the annual amount of supply chain expenditure with Indigenous-affiliated businesses increased by 148% over 2018 expenditures; similarly, Indigenous-affiliated supply chain spend, as a proportion of B.C.'s total natural gas supply chain expenditures, increased from 6.4% in 2018, to 14.6% in 2021.
- Whereas the count of B.C.-based Indigenous-affiliated businesses, as a percentage of the total B.C. supply chain increased marginally from 4.6% in 2018 to 5.5% in 2021. The overall increase in the count of Indigenous-affiliated vendors in B.C. stood at 14%.
- This represents an opportunity for Indigenous and non-Indigenous businesses to pursue new partnerships.

| | 2018 | 2019 | 2020 | 2021 | % CHANGE 2018-2021 |
|---|---|---|---|---|---|
| INDIGENOUS SPEND (Amount) | $ 79M | $ 125M | $ 143M | $ 196M | **148%** |
| INDIGENOUS SPEND (% of B.C. Supply Chain Spend) | 6.4% | 10.7% | 15.1% | 14.6% | |
| INDIGENOUS VENDOR COUNT | 77 | 87 | 89 | 88 | **14%** |
| INDIGENOUS VENDOR COUNT (% of B.C. Supply Chain Vendor Count) | 4.6% | 5.2% | 5.7% | 5.5% | |

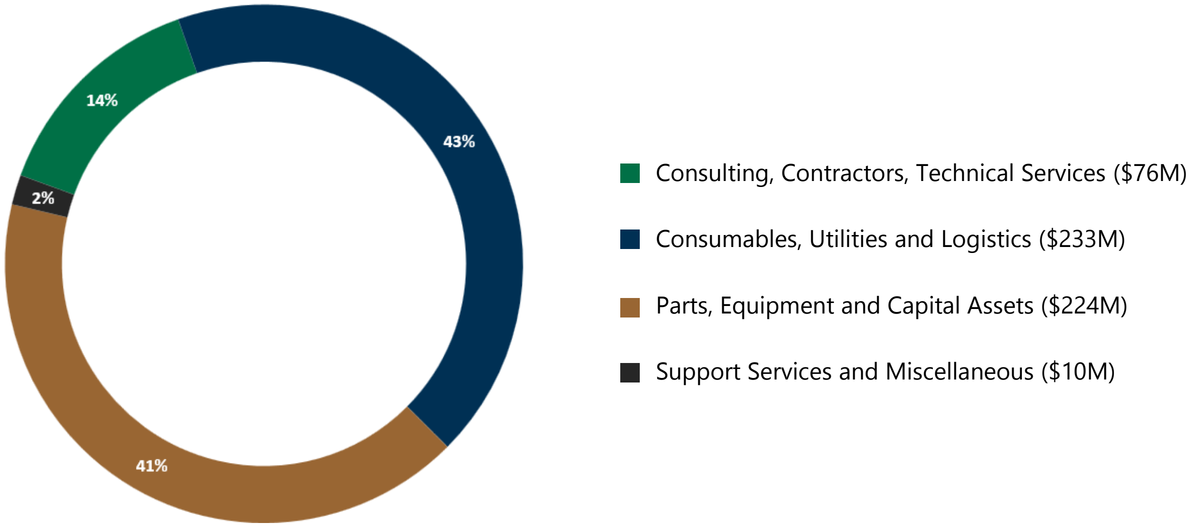
Percentages reflect Indigenously affiliated vendors proportion of B.C. supply chain spend by B.C. based vendors.
Vendor count is based on unique vendors reported each year.

## 3.2 INDIGENOUS SUPPLY CHAIN LOCATION IMPACT

- The distribution of Indigenous-affiliated vendors was mapped according to the **British Columbia Assembly of First Nations (AFN) 'First Nations in B.C. Interactive Map'**.
  - ~ 83% of Indigenous-affiliated spend and ~75% of Indigenous-affiliated vendors were in the Northeast Region based on the AFN B.C. Interactive Map' boundaries. From a regional district perspective, this area covers the Peace River Regional District.
  - The second region with the highest Indigenous spend and Indigenous-affiliated vendor count, at ~7% and ~11% respectively, was the Lower Mainland Southwest Region or the Greater Vancouver Regional District.

## 3.3 DISTRIBUTION OF INDIGENOUS SUPPLY CHAIN EXPENDITURES BY CATEGORY

- The master category 'Consumables, Utilities and Logistics' (43%), with 'Camps & Catering / Potable & Wastewater' (14%) and 'Electrical Equipment / Services' (13%) being the main categories of supply chain activity. But overall, specifically the 'Equipment Services / Maintenance' (21%) and 'Construction' (19%) supply chain subcategories, out-performed other categories, when it came to the amount of expenditure earned by Indigenous-affiliated businesses; an estimated $110M and $100M were spent on indigenous-affiliated business in these subcategories respectively.



- Indigenous-affiliated businesses offered their services in all supply chain subcategories. By count, Indigenous-affiliated businesses were most active in the 'Equipment Services / Maintenance' categories. The table below shows the distribution of the Indigenous-affiliated vendors among the categories of goods and services offered.

**INDIGENOUS-AFFILIATED BUISNESS PARTICIPATION IN NATURAL GAS SUPPLY CHAIN BASED ON CATEGORY**

| Category | ~ Vendor Count |
|---|---|
| Consulting, Contractors, Technical Services | |
| Drilling / Completion / Downhole Services | 60 |
| Engineering Services | 35 |
| Environmental / Industrial Waste Services | 55 |
| Technological Development | 1 |
| Consumables, Utilities and Logistics | |
| Camps and Catering / Potable and Wastewater | 35 |
| Chemicals | 15 |
| Electrical Equipment / Services | 20 |
| Health and Safety Materials / Services | 30 |
| Telecommunications / Office Equipment | 5 |
| Transportation | 50 |
| Parts, Equipment and Capital Assets | |
| Construction | 65 |
| Equipment Services / Maintenance | 75 |
| Materials, Parts and Supplies | 40 |
| Support Services and Miscellaneous | |
| Business Services | 35 |
| Miscellaneous | 20 |
| Retail | 20 |
| Unidentified | 1 |

Note: The spends with missing data/information/cost-codes were tagged as "Unidentified", which was less than 1%.

# SECTION FOUR

RECLAMATION-RELATED ACTIVITIES

## SECTION FOUR: RECLAMATION-RELATED ACTIVITIES

### Section Description

This section reports the contributions made by the natural gas sector towards activities involving reclamation and remediation.

### Key Insights

- Approximately $260M was spent in reclamation-related activities from 2018-2021, supported by some 280 businesses located in some 35 municipalities across B.C.
- Of these 280 businesses, 11% were Indigenous-affiliated businesses.
- 'Environmental / Industrial Waste Services' was the main supply chain category in terms of amount spent on reclamation.

## 4.1 RECLAMATION INVESTMENT BY YEAR

The following table depicts the annual spend on reclamation and remediation projects during 2018 to 2021.

### B.C. RECLAMATION AND REMEDIATION SUPPLY CHAIN

| | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|
| SPEND | $42M | $51M | $63M | $106M |
| VENDOR COUNT | 115 | 145 | 170 | 195 |

### B.C. ANNUAL CHANGE IN RECLAMATION & REMEDIATION SUPPLY CHAIN SPEND

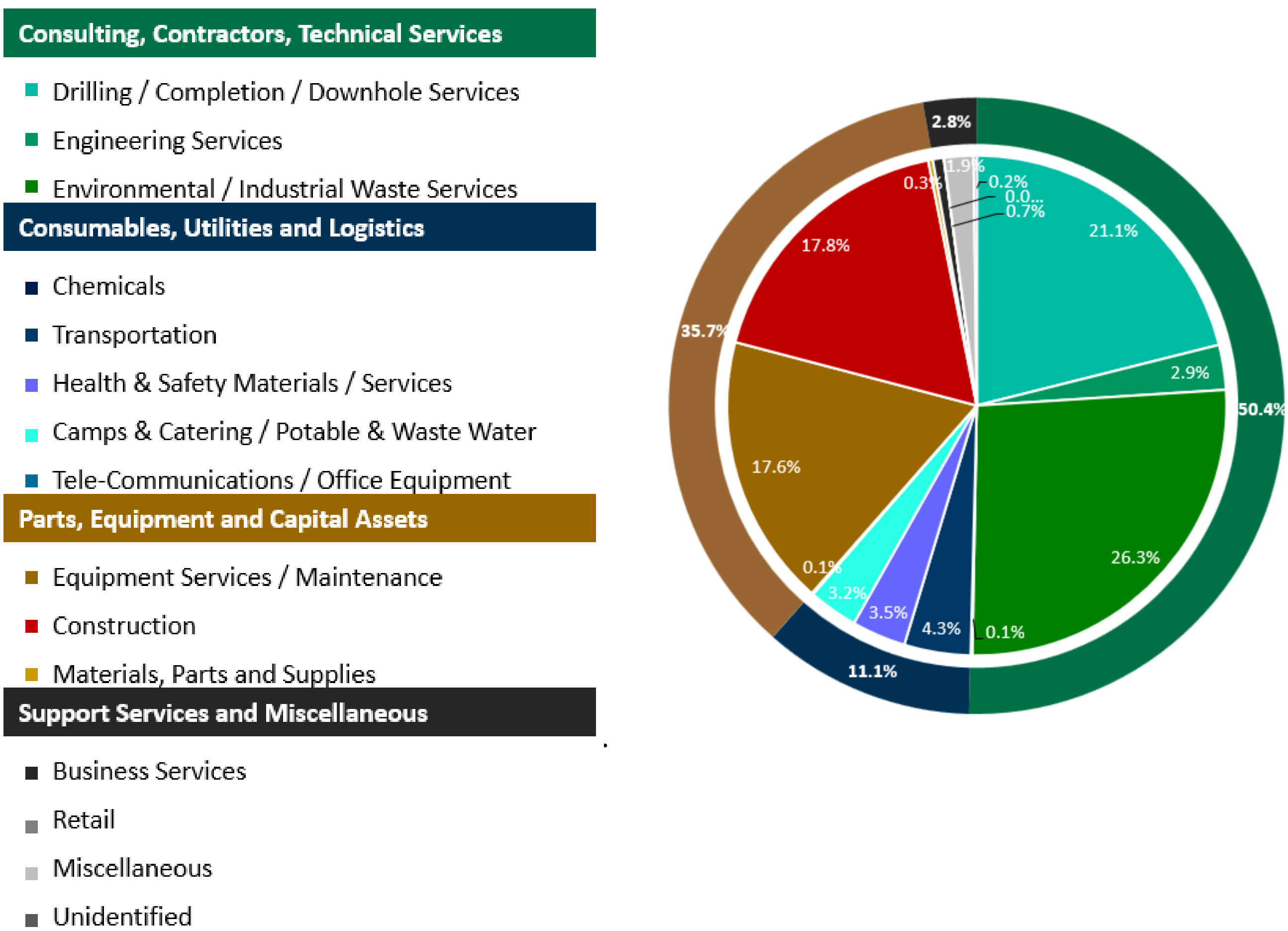
B.C.-based vendors active in reclamation and remediation activities saw a consistent year over year increase in activity and spend between 2018-2021.

| | | 2018-2019 | 2019-2020 | 2020-2021 |
|---|---|---|---|---|
| CHANGE IN RECLAMATION & REMEDIATION SUPPLY CHAIN SPEND | AMOUNT | Rise of $9M | Rise of $13M | Rise of $42M |
| | % | 22% | 25% | 67% |
| CHANGE IN RECLAMATION & REMEDIATION SUPPLY CHAIN VENDOR COUNT | COUNT | Rise of 26 | Rise of 27 | Rise of 24 |
| | % | 22% | 19% | 14% |

## 4.2 RECLAMATION INVESTMENT BY SUPPLY CHAIN CATEGORIES

- The a) 'Environmental / Industrial Waste Services', b) 'Drilling / Completion / Downhole Services', c) 'Construction' and d) 'Equipment Services / Maintenance' were the top four supply chain categories, representing more than 80% of the spend made with B.C.-based businesses on reclamation-related activities.

### BUSINESS PARTICATION IN RECLAMATION-RELATED ACTIVITIES CATEGORY




Note: The spends with missing data/information/cost-codes were tagged as "Unidentified", which was less than 1%.

# SECTION FIVE

COMMUNITY INVESTMENT

# SECTION FIVE: COMMUNITY INVESTMENT

## Section Description

This section reports the contributions made by the OCC companies to community initiatives and organizations.

## Key Insights

- **Approximately $16.8M** in community investments were made to more than **350 organizations across B.C. in over 25 Indigenous communities and municipalities** from 2018-2021.
- The **top three specific areas of community investment**, based on the number of recipients **who received contributions during the study period in B.C. were:**
  a. **Indigenous community investment**
  b. **Business improvement organizations**
  c. **Educational support**
- More than **$13M** in community investments supported over 75 Indigenous communities and organizations.

## 5.1 COMMUNITY INVESTMENTS DISTRIBUTION BY YEAR

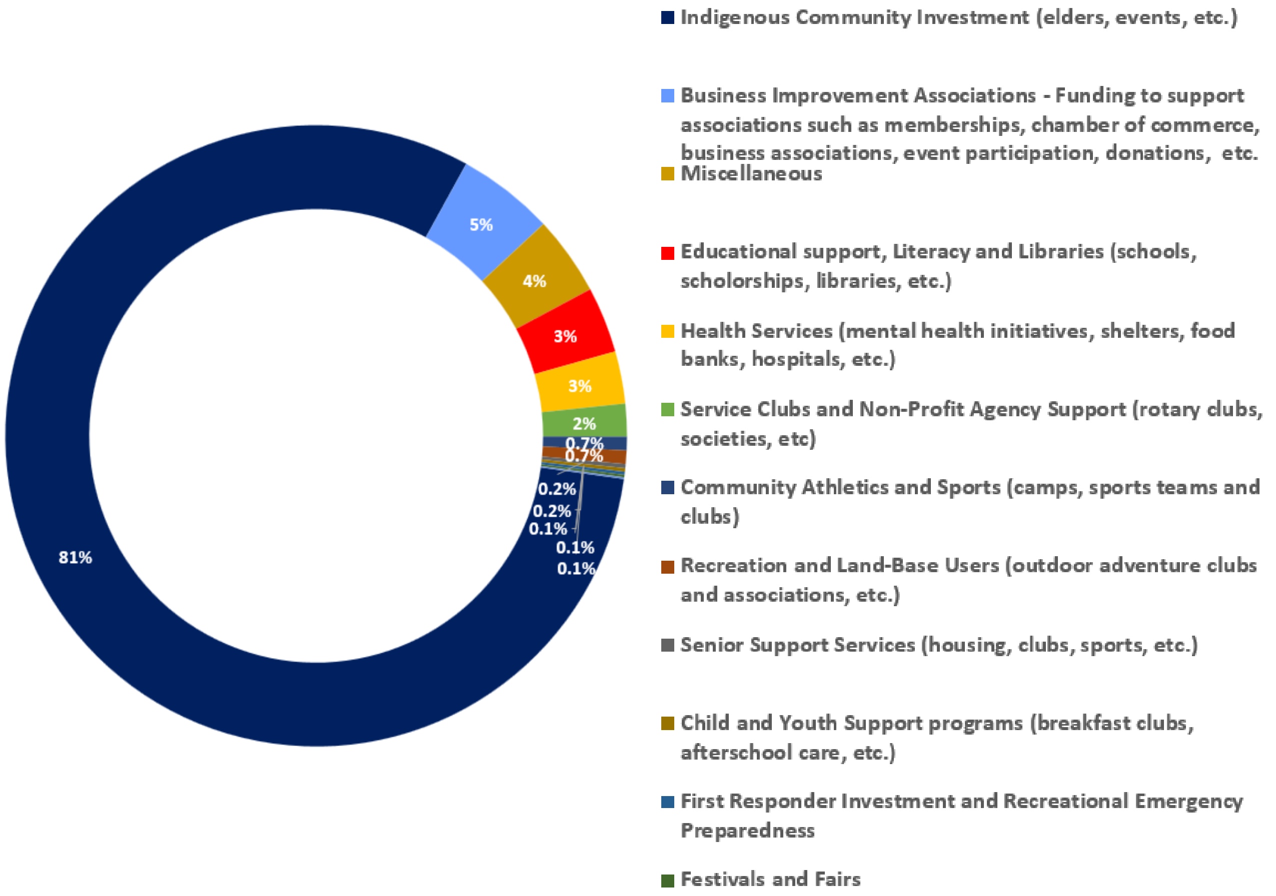
Approximately $16.8M was donated to support some 350-based community initiatives and organizations. The table below shows the annual distribution of community investments between 2018 and 2021.

### COMMUNITY INVESTMENT SPEND AND RECIPIENT COUNT

| | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|
| FUNDING | $3.4M | $4.0M | $3.7M | $5.7M |
| NUMBER OF ORGANIZATION SUPPORTED, INCLUDING INDIGENOUS | 150 | 145 | 120 | 130 |

## 5.2 AREAS OF COMMUNITY INVESTMENT

The contribution towards community investment benefits is distributed in the following categories:




The top three specific community investments made were in the following areas:

1. Contribution to Indigenous communities and organizations
2. Business Improvement Associations
3. Educational support, Literacy and Libraries (schools, scholarships, libraries, etc.)

## 5.3 INDIGENOUS COMMUNITY INVESTMENTS

~$13.6M was contributed to support more than 75 Indigenous-affiliated community initiatives and organizations across B.C. The table below shows the distribution of community investments made towards Indigenous-affiliated organizations between 2018 and 2021.

### INDIGENOUS COMMUNITY INVESTMENT AND RECIPIENT COUNT IN B.C.

| | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|
| FUNDING | $2.9M | $3.2M | $2.9M | $4.6M |
| NUMBER OF ORGANIZATIONS SUPPORTED | 30 | 35 | 30 | 25 |

### TOP AREAS OF INDIGENOUS COMMUNITY INVESTMENT

The following table shows the distribution of community investments supporting B.C. Indigenous communities and organizations.

| TOP FOCUS AREAS FOR INDIGENOUS COMMUNITY INVESTMENT | NUMBER OF INDIGENOUS COMMUNITY INVESTMENT PARTNERS | BENEFIT AMOUNT ($) |
|---|---|---|
| SHARED VALUE CREATION / MISCELLANEOUS[4] | -- | $10M |
| CAPACITY FUNDING | 10 | $ 3M |
| FESTIVALS AND FAIRS | 25 | $ 100K |
| BUSINESS IMPROVEMENT ASSOCIATIONS | 10 | $ 65K |
| RECREATION AND LAND-BASE USERS | 5 | $ 54K |
| EDUCATIONAL SUPPORT | 5 | $ 48K |
| HEALTH SERVICES | 5 | $ 37K |
| COMMUNITY ATHLETICS AND SPORTS | 5 | $ 13K |
| SENIOR SUPPORT SERVICES | 5 | $ 10K |
| GRAND TOTAL | 75 | $ 14M |

[4] Shared Value Creation / Miscellaneous – This funding includes capacity funding provided to Indigenous Nations as well as funding to support education, training, social and cultural programs. These payments can also include funding for the development or maintenance of physical infrastructure and environmental initiatives for Indigenous communities as well as in-kind investments of services, resources, and infrastructure excluding formal consultation activities. The information on this funding was received as lumpsum amount.

## CONCLUSION

The **Our Communities Care** study shows that B.C.'s upstream natural gas and oil sector supports economic, climate and societal transformation at a local level. As British Columbians adapt to a new world post-pandemic, OCC is a recognition by CAPP and the upstream natural gas and oil industry that rebuilding starts locally.

The diverse and geographically dispersed supply chain, together with the energy producers based here and B.C.'s world-class natural gas resources, forms the foundation for a modern, inclusive, and low-carbon upstream industry in the province.

iTOTEM Analytics believes that a strong natural gas supply chain, as demonstrated by the thousands of businesses operating in British Columbia between 2018 and 2021, can assist the province in meeting our collective goal of a decarbonized future.

**Why do we think this way?** Because B.C.'s natural gas and oil supply chain is comprised of businesses from Indigenous communities and municipalities from across B.C. Citizens who care about their community's infrastructure and services; Indigenous people with traditional knowledge and who care about reversing climate change; and residents who care deeply about advancing social progress in their schools, worksites and neighborhoods.

iTOTEM sincerely appreciates CAPP and its members' collaborative spirit in participating and reporting in the **Our Communities Care** study over a 10-month period. Participants demonstrated that data transparency is a critical first step toward creating an equitable and inclusive natural gas and oil industry. We know that solving the world's most difficult problems and seizing new opportunities requires sharing information in a way that makes data accessible, relatable, shareworthy, and trustworthy.

# APPENDIX A

## TOP 25 MUNICIPALITIES WITH THE MOST SUPPLY CHAIN SPEND

| MUNICIPALITY | | SPEND |
|---|---|---|
| 1. | FORT ST. JOHN | $ 2.5B |
| 2. | DAWSON CREEK | $ 632M |
| 3. | POUCE COUPE | $ 408M |
| 4. | VANCOUVER | $ 337M |
| 5. | WONOWON | $ 132M |
| 6. | CHARLIE LAKE | $ 120M |
| 7. | PRINCE GEORGE | $ 83M |
| 8. | ROLLA | $ 78M |
| 9. | CRESTON | $ 77M |
| 10. | FORT NELSON | $ 40M |
| 11. | ARMSTRONG | $ 35M |
| 12. | BALDONNEL | $ 32M |
| 13. | TUMBLER RIDGE | $ 23M |
| 14. | DELTA | $ 20M |
| 15. | HUDSON'S HOPE | $ 19M |
| 16. | FARMINGTON | $ 17M |
| 17. | CHETWYND | $ 15M |
| 18. | PENTICTON | $ 14M |
| 19. | GOODLOW | $ 14M |
| 20. | ROSE PRAIRIE | $ 13M |
| 21. | BURNABY | $ 13M |
| 22. | PRESPATOU | $ 12M |
| 23. | SURREY | $ 12M |
| 24. | TAYLOR | $ 10M |
| 25. | CECIL LAKE | $ 10M |

## TOP 25 MUNICIPALITIES WITH THE GREATEST NUMBER OF UNIQUE SUPPLIERS

| MUNICIPALITY | | NUMBER OF SUPPLIERS |
|---|---|---|
| 1. | FORT ST. JOHN | 870 |
| 2. | DAWSON CREEK | 440 |
| 3. | VANCOUVER | 120 |
| 4. | CHARLIE LAKE | 110 |
| 5. | FORT NELSON | 100 |
| 6. | CHETWYND | 55 |
| 7. | PRINCE GEORGE | 50 |
| 8. | SURREY | 40 |
| 9. | TAYLOR | 40 |
| 10. | POUCE COUPE | 40 |
| 11. | BURNABY | 40 |
| 12. | KELOWNA | 35 |
| 13. | CECIL LAKE | 30 |
| 14. | ARRAS | 30 |
| 15. | HUDSON'S HOPE | 25 |
| 16. | VICTORIA | 25 |
| 17. | ROSE PRAIRIE | 25 |
| 18. | WONOWON | 20 |
| 19. | TUMBLER RIDGE | 20 |
| 20. | DELTA | 20 |
| 21. | PRESPATOU | 20 |
| 22. | RICHMOND | 15 |
| 23. | KAMLOOPS | 15 |
| 24. | TOMSLAKE | 15 |
| 25. | NORTH VANCOUVER | 15 |

# APPENDIX B

## TOP FIVE MUNICIPALITIES WITH THE TOP FIVE CATEGORIES OF EXPENDITURES

| SUBCATEGORY | MUNICIPALITY | SPEND |
|---|---|---|
| CONSTRUCTION | POUCE COUPE | $ 368M |
| | FORT ST. JOHN | $ 351M |
| | DAWSON CREEK | $ 87M |
| | VANCOUVER | $ 49M |
| | CHARLIE LAKE | $ 32M |
| EQUIPMENT SERVICES / MAINTENANCE | FORT ST. JOHN | $ 524M |
| | DAWSON CREEK | $ 109M |
| | CHARLIE LAKE | $ 43M |
| | PRINCE GEORGE | $ 17M |
| | VANCOUVER | $ 10M |
| DRILLING / COMPLETION / DOWNHOLE SERVICES | FORT ST. JOHN | $ 448M |
| | DAWSON CREEK | $ 131M |
| | CRESTON | $ 57M |
| | VANCOUVER | $ 12M |
| | WONOWON | $ 11M |
| TRANSPORTATION | FORT ST. JOHN | $ 199M |
| | DAWSON CREEK | $ 55M |
| | BALDONNEL | $ 25M |
| | ROLLA | $ 17M |
| | ARMSTRONG | $ 15M |
| ENVIRONMENTAL / INDUSTRIAL WASTE SERVICES | FORT ST. JOHN | $ 140M |
| | ROLLA | $ 50M |
| | VANCOUVER | $ 46M |
| | DAWSON CREEK | $ 44M |
| | POUCE COUPE | $ 17M |

# APPENDIX C

## ASSUMPTIONS AND PARAMETERS

The following section summarizes methodology, definitions and categorization.

These steps were taken over 10 months to produce the **Our Communities Care** study:

1. Finalized the data model and categorizations,
2. Developed the draft data collection forms,
3. Consulted with CAPP Policy and Indigenous Relations Advisory Committees on the data model and data collection form,
4. Supply chain data was collected from seven CAPP member companies representing 90% of the natural gas production in B.C.,
5. iTOTEM processed the data, which included but not limited to the following steps:
    - data cleaning,
    - data structuring for analysis,
    - categorization of supply chain and community investments,
    - deduplication,
    - data consolidation,
    - standardization and checking of vendor locations,
    - business names and location names standardization,
    - validation and tagging of vendor locations to respective regional districts and Provinces, Territories and States,
    - identifying and tagging reclamation and remediation related expenses,
    - identifying and tagging non-supply chain spends as exclusions,
    - identifying, tagging and validation of Indigenous-affiliated vendors,
    - identifying and tagging community investment related spends
6. A quality assurance (QA) process was run, and all data was validated by each participating company. Detailed QA reports were generated for each participating members and feedbacks were received from the members on their respective data for validating the topline results, supply chain categories, Indigenous affiliations, reclamation spends and vendor locations.

The table below describes the methodology used in the Our Communities Care Study.

| METHODOLOGY | |
|---|---|
| **FOCUS AREA** | **ASSUMPTIONS AND PARAMETERS** |
| CATEGORIZATION | • All vendor expenses were tagged to the natural gas supply chain based on 17 goods, materials, and service subcategories in accordance with the account descriptions provided by the members in their data. These 17 categories were further grouped together into four master supply chain categories, See below for explanation on categorization.<br>• All the spends towards community investment were tagged to 12 different community investment-based categories.<br>• To provide further insights on community investments made, the "Indigenous Community Investment" spend was also tagged to these categories . |
| GEOGRAPHIC REFERENCES | • Suppliers were tagged by Indigenous Nation, municipality or unincorporated community according to the following federal and provincial government mapping resources:<br>• Indigenous - First Nation Profiles (aadnc-aandc.gc.ca)<br>• British Columbia Assembly of First Nations (AFN) 'First Nations in B.C. Interactive Map -.bcafn.ca/first-nations-bc/interactive-map<br>• 'Municipalities - CivicInfo BC \| Municipalities<br>• Unincorporated Communities - CivicInfo BC \| Municipalities<br>• Municipalities and communities were mapped by Regional District. |
| INDIGENOUS-AFFILIATED BUSINESS | Indigenous-affiliated business refers to:<br>• Any corporation, partnership, firm, joint venture, or other entity which has, prior to the Issue Date, by or through one or more contracts, agreements, arrangements, or understandings between it and a Local Indigenous Community or one or more Affiliated Indigenous Individuals procure for, conferred on or otherwise made available to that Local Indigenous Community or those Affiliated Indigenous Individuals business, economic, employment/training opportunities, or benefits (in each case as certified or confirmed in writing by the duly authorized leaders or representatives of the relevant Local Indigenous Community).<br>**Or**<br>• Indigenous Businesses who are affiliated with, controlled by, and/or are members of a Local Indigenous Community (in each case as defined by the duly authorized leaders or representatives of the relevant Local Indigenous Community). |
| LIMITATIONS AND NOTES | • iTOTEM relied on the accuracy of the information provided by CAPP participants regarding their supply chain and community investment expenditures and the respective locations of the businesses in B.C.<br>• The **Vendor Count** for reclamation activities is based on the count reported by six of the seven participating CAPP member companies. The **Reclamation Spend** was reported by seven out of seven participating companies. Therefore, the number of vendors active in reclamation-related activities is conservative.<br>• Vendors with 'Unidentified Locations' were included in the study's **Total Spend** and **Total Count,** and not included in the B.C. spend and count benefits. |
| QUALITY ASSURANCE DATA CHANGES AND EXCLUSIONS | • A QA process was run to remove duplications, standardize spellings and apply exclusions.<br>• All the spends relating to taxes/levies/Government fees etcetera were excluded from the analysis |

| METHODOLOGY | |
|---|---|
| **FOCUS AREA** | **ASSUMPTIONS AND PARAMETERS** |
| | • iTOTEM ran a QA process with the OCC participants to assure the data veracity in terms of business locations, supply chain categorization, Indigenous-affiliated vendor identification and reclamation-related activity tagging. |
| ROUNDING AND MARGIN OF ERROR | • $ were rounded to the nearest billion, million or where applicable the nearest thousand.<br>• Counts were rounded down to nearest 5s and 10s.<br>• The unique count of suppliers may have a margin of error of up to 3%. |
| UNIQUE SUPPLIER COUNTS | • A supplier can be tagged in more than one municipality, but this does not change the total number of unique vendors in the province, nor does it change the total number of unique businesses in a municipality.<br>• The unique supplier count means the supplier is counted once. In situations where the same supplier operated in more than one location, but spelling was recorded differently, the spelling was standardized, and duplications excluded.<br>• A supplier's head office can be outside of the provinces, but if the expenditure was made with a B.C.-based office, the supplier was counted as being in B.C.<br>• The locations of the vendors were extracted from postal codes; postal codes were verified with Canada Post.<br>• If a supplier had multiple offices, in B.C. and an office in other Provinces or Territories, the supply chain expenditure was tagged to the municipality where the procurement occurred in B.C. This geographic label represents the supply chain potential and does not negate some of the supply chain expenditure may benefit other regions of Canada. |

## STANDARDIZATION AND GROUPING OF COST CODE CATEGORIES

| STANDARDIZING CATEGORIES | | | | |
|---|---|---|---|---|
| **INDICATOR: TYPE OF MATERIALS, PRODUCTS, AND SERVICES** | **MASTER CATEGORIES OF SPEND** | | | |
| | **CONSULTING, CONTRACTING AND TECHNICAL SERVICES** | **PARTS, EQUIPMENT AND CAPITAL ASSETS** | **CONSUMABLES, UTILITIES AND LOGISTICS** | **SUPPORT SERVICES** |
| BUSINESS SERVICES | | | | X |
| CAMPS AND CATERING / POTABLE AND WASTEWATER | | | X | |
| CHEMICALS | | | X | |
| CONSTRUCTION | | X | | |
| DRILLING / COMPLETION / DOWNHOLE SERVICES | X | | | |
| ELECTRICAL EQUIPMENT / SERVICES | | | X | |
| ENGINEERING SERVICES | X | | | |
| ENVIRONMENTAL / INDUSTRIAL WASTE SERVICES | X | | | |
| EQUIPMENT SERVICES / MAINTENANCE | | X | | |
| HEALTH AND SAFETY MATERIALS / SERVICES | | | X | |
| MATERIALS, PARTS AND SUPPLIES | | X | | |
| RETAIL | | | | X |
| TECHNOLOGICAL DEVELOPMENT | X | | | |
| TELECOMMUNICATIONS / OFFICE EQUIPMENT | | | X | |
| TRANSPORTATION | | | X | |

| STANDARDIZING CATEGORIES | | | | |
|---|---|---|---|---|
| **INDICATOR: TYPE OF MATERIALS, PRODUCTS, AND SERVICES** | **MASTER CATEGORIES OF SPEND** | | | |
| | **CONSULTING, CONTRACTING AND TECHNICAL SERVICES** | **PARTS, EQUIPMENT AND CAPITAL ASSETS** | **CONSUMABLES, UTILITIES AND LOGISTICS** | **SUPPORT SERVICES** |
| MISCELLANEOUS | | | | X |
| UNIDENTIFIED | | | | X |

## DEFINITION OF SUPPLY CHAIN CATEGORIES

| CATEGORY | DEFINITION |
|---|---|
| BUSINESS SERVICES | Companies involved in consulting on business practices and business efficiencies, accounting, legal. Includes training and staffing |
| CAMPS AND CATERING / POTABLE AND WASTEWATER | Companies providing temporary or permanent camp facilities and catering and/or food services; supplying potable water and treating wastewater |
| CHEMICALS | Companies dealing with manufacturing, handling, developing or selling chemicals/chemical products |
| CONSTRUCTION | Companies involved in the manual labour of a project such as constructing pipelines, constructing buildings, tree clearing, etc. |
| DRILLING / COMPLETION / DOWNHOLE SERVICES | Companies involved in providing and/or consulting on drilling, completion or downhole services for projects |
| ELECTRICAL EQUIPMENT / SERVICES | Companies providing and/or consulting on instrumentation, electrical equipment usage, electrical power servicing, electrical control equipment etc. |
| ENGINEERING SERVICES | Companies providing engineering services such as consulting, designing projects (excludes drilling) |
| ENVIRONMENTAL / INDUSTRIAL WASTE SERVICES | Companies working on environmental services such as testing, inspection, research, monitoring, reclamation and remediation, waste treatment, etc. |
| EQUIPMENT SERVICES / MAINTENANCE | Companies manufacturing, distributing, selling or renting equipment such as large rigging equipment, pumps, automation equipment etc. Includes maintenance, repair and operation of equipment/facilities |
| HEALTH AND SAFETY MATERIALS / SERVICES | Companies providing products and/or services that promote and provide safety in the workforce such as training or fire-retardant uniforms etc. |
| MATERIALS, PARTS AND SUPPLIES | Companies providing basic materials and unfinished goods and/or spare parts to the oil sands such as steel, plastics, nuts, bolts, filters, small piping, etc. |
| RETAIL | Companies falling outside the realm of the natural gas industry such as signage, office supply, advertising, sports goods stores etc. |
| TECHNOLOGICAL DEVELOPMENT | Companies dealing with developing technology and/or supplying technological products such as software development, computer models etc. |
| TELECOMMUNICATIONS / OFFICE EQUIPMENT | Companies providing temporary or permanent communications devices and/or services such as Telus, Bell etc. |
| TRANSPORTATION | Companies involved in logistics such as goods transporting and package shipping. Includes flights, vehicle rentals and courier services. |
| MISCELLANEOUS | The supply chain spends which not fall under the above 15 categories were tagged as miscellaneous. |

Note: The spends with missing data/information/cost-codes were tagged as "Unidentified", which was less than 1%.

## DEFINITION OF COMMUNITY INVESTMENT CATEGORIZATION

| TYPE OF COMMUNITY INVESTMENT | DEFINITION |
|---|---|
| **ART, MUSIC, THEATRE INITIATIVES** | Funding to support art and theatre such as art councils, art galleries, art clubs, etc. |
| **BUSINESS IMPROVEMENT AND LABOUR ORGANIZATIONS** | Funding to support business improvement associations such as Chamber of Commerce, business associations, event participation, donations, etc. |
| **CHILD AND YOUTH SUPPORT PROGRAMS** | Funding to support children and youth with programs such as breakfast clubs, afterschool care, etc. |
| **COMMUNITY ATHLETICS AND SPORTS** | Funding to support community athletics and sports such as camps, sports teams and clubs. |
| **EDUCATIONAL SUPPORT, LITERACY AND LIBRARIES** | Funding to support education initiatives for communities or individuals including the following: scholarships, donations to the local school, financial support for school programs, etc. |
| **FESTIVALS AND FAIRS** | Funding to support community festivals and fairs such as carnivals, exhibitions, and community events. |
| **FIRST RESPONDER AND RECREATIONAL EMERGENCY PREPAREDNESS** | Funding to support first responders and recreational emergencies such as firefighter charities and RCMP victim services. |
| **HEALTH SERVICES** | Funding to support health and wellness within the community including the following: health infrastructure (water and sanitation projects, agricultural projects), community wellness initiatives, etc. |
| **INDIGENOUS COMMUNITY INVESTMENT** | Funding to support Indigenous communities specifically. Community investments to Indigenous communities include the following: health and wellness (sports, health infrastructure, community wellness initiatives, environmental initiatives (environmental conservation, wildlife societies, and emergency preparedness), physical infrastructure (pow-wow grounds), social and cultural program funding (pow-wows, elder retreats, treaty days, language programs), education (scholarships, donations to local schools), and employment/training programs.<br><br>Does not include consultation or permitting-related expenditures |
| **RECREATION AND LAND-BASE USERS** | Funding to support recreation and land-based users such as outdoor adventure clubs and associations, etc. Includes funding to support environmental initiatives, wildlife societies |
| **SENIOR SUPPORT SERVICES** | Funding to support Seniors for services such as housing, food programs, clubs, sports, etc. |
| **SERVICE CLUBS AND NON-PROFIT AGENCY SUPPORT** | Funding to support registered service clubs and non-profit agencies such as the Rotary. |

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