



Shared Values Report on Indigenous Supply Chain and Indigenous Community Investment in Alberta's Oil and Natural Gas Industry (2021–2023)

April 2025

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A Shared Goal

The **Canadian Association of Petroleum Producers (CAPP)** commissioned the ***Shared Values Report on Indigenous Supply Chain and Indigenous Community Investment in Alberta's Oil and Natural Gas Industry*** to highlight the contributions and participation rates of Indigenous Peoples in the sector between 2021 and 2023. The SVR strives to capture both the economic and social impacts of business activities and complements traditional economic impact studies.

Building Trust through Action

iTOTEM is aligned with the objectives of CAPP's inaugural ***Shared Values Report on Indigenous Supply Chain and Indigenous Community Investment in Alberta's Oil and Natural Gas Industry (2021–2023)*** namely, to support actions that build positive, long-lasting trust between Indigenous Peoples and Alberta's oil and natural gas sector. And while the report also highlights opportunities to increase Indigenous participation, iTOTEM sees Indigenous Nations, vendors and a sector striving to make shared progress.

Reporting quantifiable data on Indigenous supply chain and Indigenous Community Investments promotes transparency and uncovers opportunities for partnerships.

Trust is built on this transparency. By sharing detailed data on investments with Indigenous communities and affiliated vendors through the SVR process, we believe Alberta's oil and natural gas sector is reinforcing this commitment.

Furthermore, collaboration with Indigenous vendors not only advances economic reconciliation, but also results in innovative solutions to Canada's oil and natural gas industry challenges, such as decarbonization.

The insights in this SVR show the important role Indigenous-affiliated vendors play, not just in the oil and natural gas industry's supply chain, but also in driving economic growth and social progress across Alberta and Canada. And we're stronger as a country because of it.

Shared Values Reporting Overview

Shared Values Reporting (SVR) was developed by iTOTEM Analytics, an Indigenous-affiliated data science and communications firm based in Vancouver, B.C. and Houston, TX. An SVR methodology measures and analyzes transactional procurement and socio-economic data to reveal the hyper-local impacts of annual capital investments and operations in regulated industries.

Designed to provide insights that demonstrate the value created for both vendors and communities, an SVR goes beyond traditional modelling and reporting by embedding the principles of 'Creating Shared Value', as envisioned by Michael E. Porter and Mark R. Kramer**. SVRs uniquely focus on measuring vendors impact combined with assessing community benefits.

**Michael E. Porter and Mark R. Kramer. "Creating Shared Value." Harvard Business Review, Jan.-Feb. 2011, pp. 62-77.

Report Structure

Twelve CAPP member companies—representing **55%** of Alberta’s oil and natural gas production as of 2023 — participated in the **Indigenous Supply Chain and Indigenous Community Investment Shared Values Report** (SVR) project. Between 2021 and 2023, they reported **\$115.6B** in supply chain expenditures across Canada, with **61%** of those expenditures directed to Alberta-based vendors.

This SVR analyzes the Indigenous-affiliated supply chain participation and Indigenous Community Investments reported associated with these oil and natural gas industry companies in Alberta and as a subset the Athabasca, Cold Lake, Peace River region herein known as the oil sands region. See the list of participating companies and the approximate representation of oil and natural gas production.

The **Shared Values Report (SVR)** is structured into four sections:

1. **Guidance Documentation:** Provides an overview of the SVR process, illustrating how data was collected, analyzed, and mapped. The section includes a description of the calculations used, details the application of machine learning to classify cost codes, with additional explanations provided in the appendices.
2. **Key Insights:** Highlights key findings derived from the contributions of Alberta’s oil and natural gas operations to Indigenous communities and municipalities in Alberta, as well as across Canada.
3. **Impact by Region:** Highlights key findings and insights derived from the contributions of Alberta’s oil and natural gas operations to Indigenous communities and municipalities in Alberta, as well as across Canada.
4. **Diversity of Vendors and Community Investments:** Outlines Indigenous-affiliated vendor participation and reported Indigenous investments between 2021 and 2023, with a focus on vendor distribution across key supply chain categories and types of community investment.
5. **Appendices:** The section includes explanation on the data collection and validation processes, as well as the assumptions underpinning the analysis.

SVR Participating Companies

- ARC Resources Ltd.
- Canadian Natural Resources Limited
- Cenovus Energy Inc.
- Chevron Canada Limited
- ConocoPhillips Canada Resources Corp.
- Crescent Point Energy (renamed Veren Inc. in 2024)
- Imperial Oil Limited
- NuVista Energy Ltd.
- Ovintiv Canada ULC
- Suncor Energy Inc.
- Tamarack Valley Energy Ltd.
- Tourmaline Oil Corp.

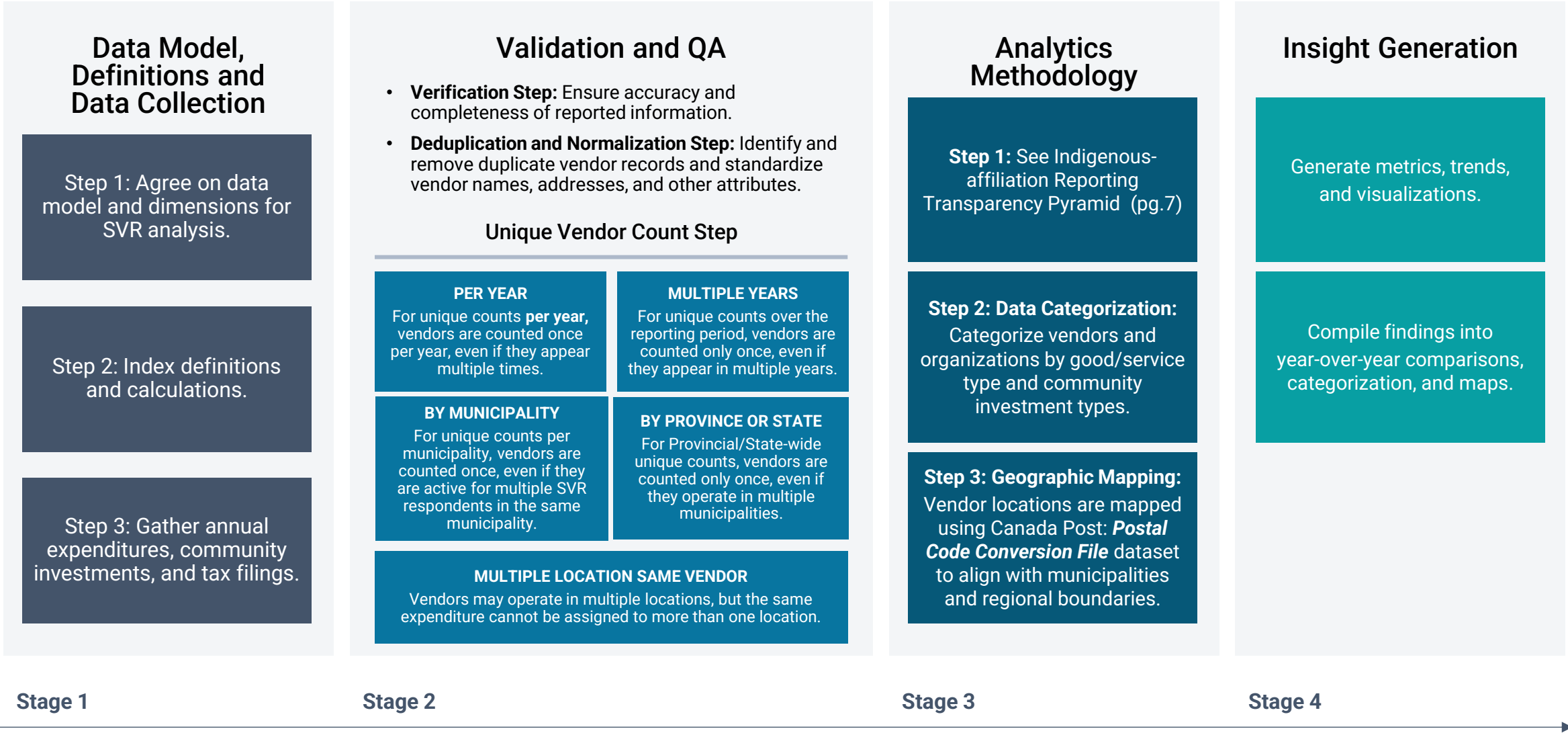
Guidance Documentation

Provides an overview of the SVR process, illustrating how data was collected, analyzed, and mapped. It includes a description of the calculations used, details the application of machine learning to classify cost codes with additional explanations provided in the appendices.

1

SECTION

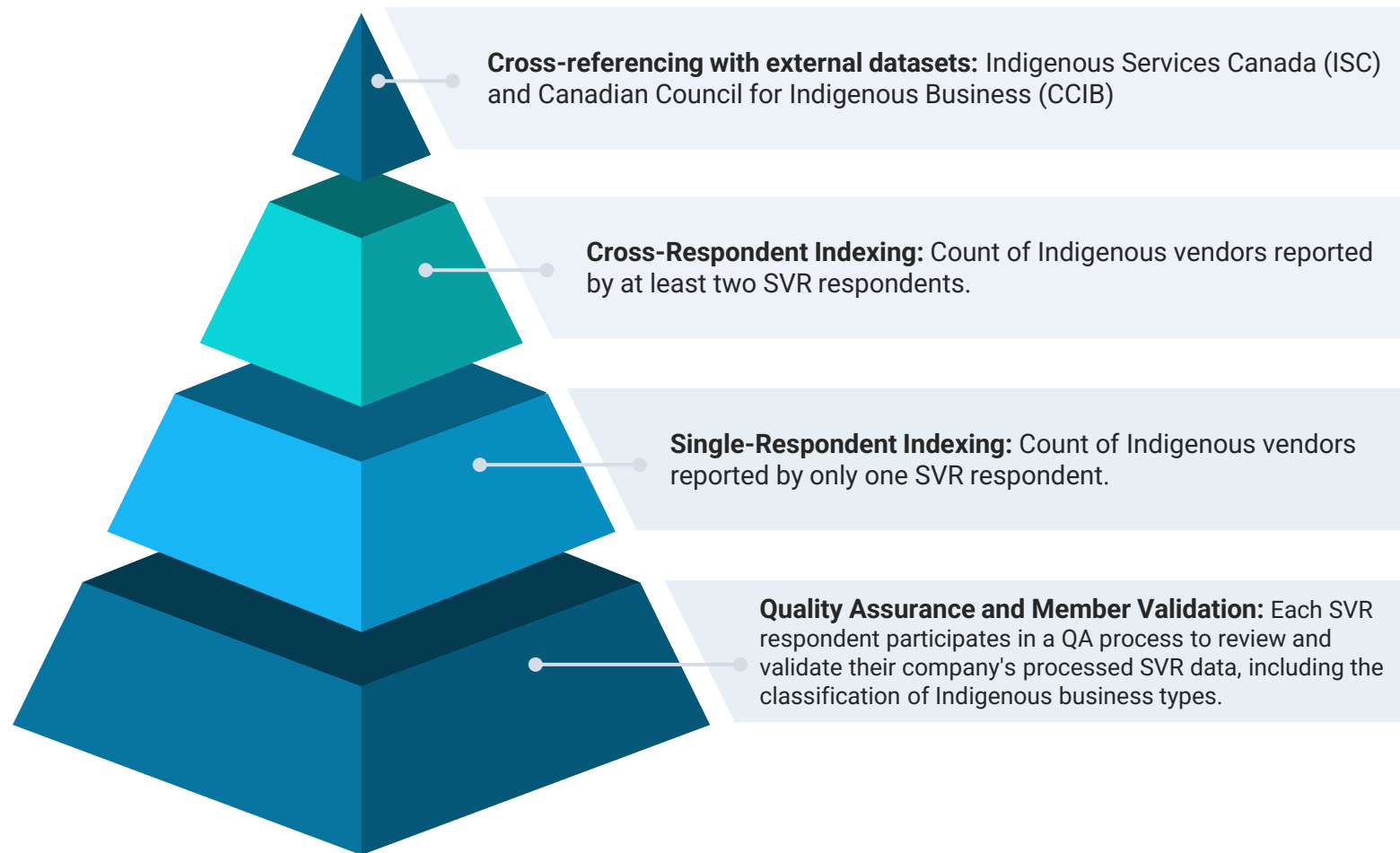
Shared Values Reporting (SVR) Process Overview



Promoting Transparency and Accountability in Indigenous Participation Reporting

- Each company participating in this Shared Values Reporting (SVR) has its own internal process for confirming Indigenous business structures.
- The SVR does not independently verify the legal ownership of Indigenous businesses reported by participants. Rather, its methodologies focus on standardizing data aggregation and participation metrics to reveal reported Indigenous participation rates in supply chains and community investments.
- The SVR publishes key insights, such as the number of vendors identified as majority-owned compared to the percentage of Indigenous-affiliated businesses reported. **By openly sharing these metrics, the SVR fosters accountability and transparency, showcasing the commitment of participating companies to reconciliation and measurable progress. See the Reporting Transparency Pyramid.**

Indigenous-affiliation Reporting Transparency Pyramid



Explanation of Calculations

| Topic | Description |
|--------------------------------|--|
| Count of Municipalities | <ul style="list-style-type: none"> The count of municipalities referred in the SVR includes all the municipalities, unincorporated communities, including hamlets, localities, and designated places as defined under Government datasets and oil and natural gas companies' submissions. The study utilizes the Canada Post Postal CodeOM Conversion File (PCCF) to standardize and link postal codes to geographic areas for statistical and spatial analysis. This dataset includes the 'Comm_Name' field, which identifies community names denoting any city, town, or village across Canada that is recognized as a valid mailing address. |
| Percentage Change Calculations | <ul style="list-style-type: none"> All percentage change calculations performed in the SVR are based on the on actual (unrounded) numbers for accuracy and consistency. However, all the values shown in the report are rounded. Therefore, the percentage change presented in the SVR may not match the percentage change calculated by readers using rounded values. |
| Rounding | <p>All the values shown in the report are rounded for readability, focus on key insights and visual appeal.</p> <ul style="list-style-type: none"> \$ were rounded to the nearest billion, million or thousand. Counts were rounded down to nearest 5s and 10s. |
| Representation Index | <ul style="list-style-type: none"> Representation index is a measure used to quantify the proportional representation of different groups in a particular context like demographics. iTOTEM used a representation index to assess the representation of Indigenous-affiliated supply chain in Alberta's oil and natural gas sector by spend. A value greater than 100 means Indigenous-affiliated vendors exceed representation in supply chain expenditures based on the Indigenous population in the province. And a value less than 100 means the supply chain expenditures of Indigenous-affiliated vendors is lower than it could be based on the Indigenous population in the province. The representation index for Alberta's oil and natural gas sector was calculated as follows: <ul style="list-style-type: none"> Representation Index = Observed Representation / Expected Representation x100 <p>Where:</p> <ul style="list-style-type: none"> Expected Representation = Alberta Indigenous Population / Alberta Total Population Observed Representation by Vendor Spend = Indigenous-affiliated Spend of Alberta's Oil and & Gas / Total Spend of Alberta's Oil and & Gas <p><i>Indigenous Population data source: Stats Canada https://www12.statcan.gc.ca/census-recensement/2021/as-sa/fogs-spg/page.cfm?topic=8&lang=E&dguid=2021A000248#</i></p> |

Use of Machine Learning

| Topic | Description |
|----------------|---|
| Categorization | <ul style="list-style-type: none">• The supply chain expenditures were classified into categories as finalized by CAPP. Please refer Appendix B for definitions.• The categorization of supply chain was completed in two steps that combines efficiency of Machine Learning (ML) with expert validation ensuring that the categorization results are scientifically robust and practically aligned with the unique characteristics of the oil and natural gas industry.<ul style="list-style-type: none">○ Step 1: A combination of ML models were trained on validated historical categorized data from CAPP's previous natural gas SVRs, achieving over 90% accuracy in predicting supply chain categories based on cost codes submitted by members. The training data for ML model was customized and carefully used, not sourced from any public data, and was enhanced specifically for each project to ensure its relevance and precision.○ Step 2: After the ML models provided initial classifications, all results were reviewed and quality-assured by iTOTEM's team to ensure accuracy and consistency. |

SVR Participation

| Topic | Description |
|-----------------|---|
| Regionalization | <ul style="list-style-type: none">• Twelve CAPP member companies, representing 55% of Alberta’s oil and natural gas production (in 2023), participated in the Shared Values Report on Indigenous Supply Chain and Indigenous Community Investment in Alberta’s Oil and Natural Gas Industry project. |
| | <ul style="list-style-type: none">• Participating CAPP member companies with Alberta operations:<ul style="list-style-type: none">• ARC Resources Ltd. (submitted only for 2023)• Canadian Natural Resources Limited• Cenovus Energy Inc.• Chevron Canada Limited• ConocoPhillips Canada Resources Corp.• Crescent Point Energy Corp. (renamed Veren Inc. in 2024)• Imperial Oil Limited• NuVista Energy Ltd.• Ovintiv Canada ULC• Suncor Energy Inc.• Tamarack Valley Energy Ltd.• Tourmaline Oil Corp. |

Key Insights

Highlights key findings derived from the contributions of Alberta's oil and natural gas operations to Indigenous communities and municipalities in Alberta, as well as across Canada.

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Key Insights about Indigenous-affiliated Supply Chain Participation and Indigenous Community Investments in Alberta's Oil and Natural Gas Industry



Note: Percentages are calculated using unrounded numbers for accuracy and consistency. As a result, reported percentages may not align exactly with calculations based on rounded values.
** Indigenous community investment data was received from 11 out of 12 participating members. Some of the Community Investment data was submitted without recipients and specified location information.

More than 660^ Indigenous-affiliated Vendors from across Canada provided ~\$14.4B of Goods and Services to the Oil and Natural Gas Sector between 2021 and 2023

| | Indigenous Vendor Count 2021-2023 | \$ 2021-2023 |
|----------------|--------------------------------------|-----------------|
| Alberta | 585 | \$13.9B |
| Rest of Canada | 95 | \$418.8M |

More than **585** Indigenous-affiliated vendors based in Alberta, operating across approximately **110** municipalities and affiliated with **45*** Indigenous communities, were engaged between 2021 and 2023. Additionally, **95** Indigenous-affiliated vendors based in **40** municipalities and associated with approximately **30**** Indigenous communities across the rest of Canada were also engaged by CAPP members.



of supply chain expenditures in Alberta’s oil and natural gas sector between 2021 and 2023 were spent with Indigenous-affiliated vendors.



was the growth in median annual spending per Indigenous-affiliated vendor in Canada, rising from \$452K in 2021 to \$724K in 2023.

Note: All the values shown in the report are rounded for readability, focus on key insights and visual appeal. Please refer Appendix A.

[^] Vendors that are based in both Alberta and in the Rest of Canada are counted once for the Canada total vendor count.

^{*} There are more Indigenous communities from other Provinces associated with the organizations based in Alberta that are not counted here.

^{**} There are more Indigenous communities from Alberta associated with the organizations based in rest of Canada that are not counted here.

Above Average Indigenous-affiliated Supply Chain Participation Highlights Progress in Alberta's Oil and Gas Sector

45

Indigenous-affiliated vendors, on average, were contracted annually by each reporting CAPP member company between 2021 and 2023.

12.9%*

was the increase in the number of Indigenous-affiliated vendors within Alberta's oil and natural gas sector supply chain between 2021 and 2023.

>100

Indigenous Spend
Representation Index
(2021-2023)

The **Indigenous-affiliated Supply Chain Expenditure Representation Index**** shows **above-average** engagement with Indigenous vendors in Alberta's oil and natural gas supply chain expenditures.

Performance significantly exceeds the federal government's mandatory minimum Indigenous procurement target of 5%^, with **17.7%** of Alberta's oil and natural gas supply chain expenditures directed to Indigenous-affiliated vendors between 2021 and 2023.

* Growth calculations exclude data from one CAPP member due to partial submission.

** Please refer to Appendix A for more details on Representation Index calculations.

^ Source: [Mandatory Minimum 5% Indigenous Procurement Target - Open Government Portal](#)

Indigenous-affiliated Supply Chain and Indigenous Community Investment Metrics in Alberta's Oil and Natural Gas Sector

Average Annual Sector Impact (2021 – 2023)

| Dimension | Indicator | Oil Sands Region-based Vendors | Rest of Alberta-based Vendors | Location Unspecified^ | Alberta based Vendors |
|-------------------------------|--|--------------------------------|-------------------------------|-----------------------|-----------------------|
| Supply Chain Impact | Average Annual Aggregate Indigenous-affiliated Supply Chain Expenditures | \$1.8B | \$2.9B | \$0.0 | \$4.7B |
| | Average Annual Indigenous-affiliated Vendor Count | 180 | 330 | 0 | 485* |
| Community Investment Impact** | Average Annual Aggregate Indigenous Community Investment Expenditures** | \$8.6M | \$3.3M | \$7.6M^ | \$19.5M |
| | Average Annual Number of Indigenous Community Investment Recipients ** | 60 | 65 | NA^ | 125* |

* Vendors and CI Recipients that are based in both Oil Sands regions and Rest of Alberta are counted once for the Alberta total vendor count.
 ** Indigenous community investment data was received from 11 out of 12 participating members.
 ^ Some of the Community Investment data was submitted without a specified location and could not be assigned to Oil Sands regions or Rest of Alberta regions.

Impact by Region

Highlights key findings and insights derived from the contributions of Alberta's oil and natural gas operations to Indigenous communities and municipalities in Alberta, as well as across Canada.

3

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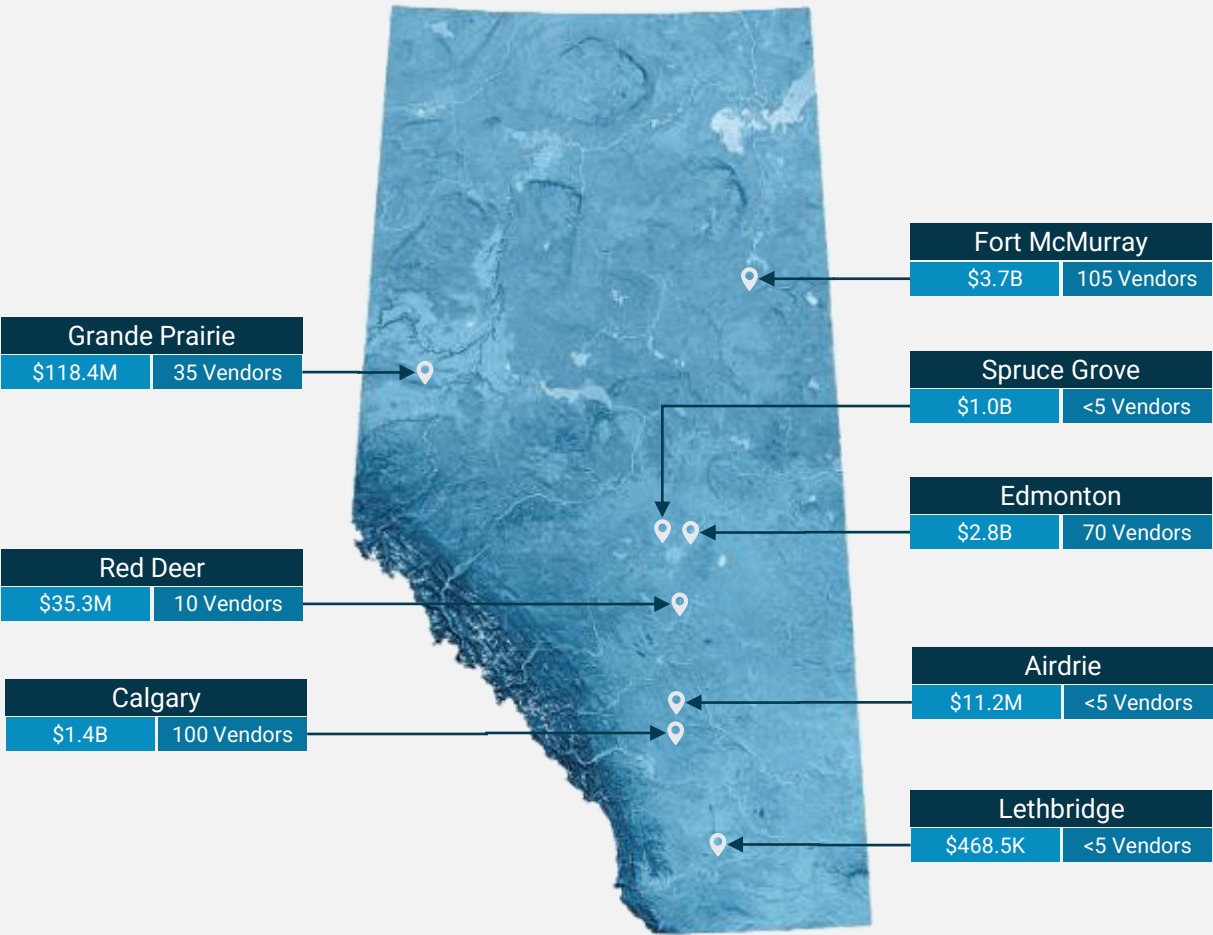
Regional Impact of Indigenous-affiliated Supply Chain Expenditures

\$13.9B

was reported in Indigenous-affiliated supply chain expenditures involving **585** Alberta-based vendors operating across **110** municipalities and **45** Indigenous communities between 2021 and 2023.

- Individual SVR participants reported Indigenous-affiliated supply chain spending in Alberta ranging from **\$17.6M to \$8.7B** over the 2021 to 2023 reporting period.
- On average, each SVR reporting member company contracted **45** Indigenous-affiliated vendors annually between 2021 and 2023.

Indigenous-affiliated Supply Chain Spending in Key Urban Centres



Indigenous Participation in Alberta’s Oil and Natural Gas Sector Shows Strong Growth

| Indigenous Participation | | 2021 | 2022 | 2023 | Annual Average* 2021-2023 |
|--|--|---------|---------|---------|------------------------------|
| Total Supply Chain Expenditures with Indigenous and Non-Indigenous Alberta-based Vendors | | \$19.9B | \$26.9B | \$32.0B | \$26.2B |
| Supply Chain Expenditures Directed to Indigenous-affiliated Alberta-based Vendors | Total Expenditures with Indigenous-affiliated Alberta-based Vendors | \$3.5B | \$4.7B | \$5.7B | \$4.7B |
| | Indigenous-affiliated Spend as a % of the Total Alberta-based Supply Chain Expenditure | 17.8% | 17.6% | 17.8% | 17.7% |
| | Oil Sands Region | \$1.4B | \$1.7B | \$2.1B | \$1.8B |
| | Rest of Alberta (Excluding Oil Sands Region) | \$2.1B | \$3.0B | \$3.6B | \$2.9B |
| Number of Active Indigenous-affiliated Alberta-based Vendors Engaged | Total Indigenous-affiliated Alberta-based Vendor Count | 445 | 500 | 515 | 485 |
| | Oil Sands Region | 180 | 180 | 185 | 180 |
| | Rest of Alberta (Excluding Oil Sands Region) | 290 | 345 | 355 | 330 |

* Vendors that participated in multiple years and those that are based in multiple geographic locations are counted once for the total reporting period count and the Alberta total vendor count.

Diversity of Vendors and Community Investments

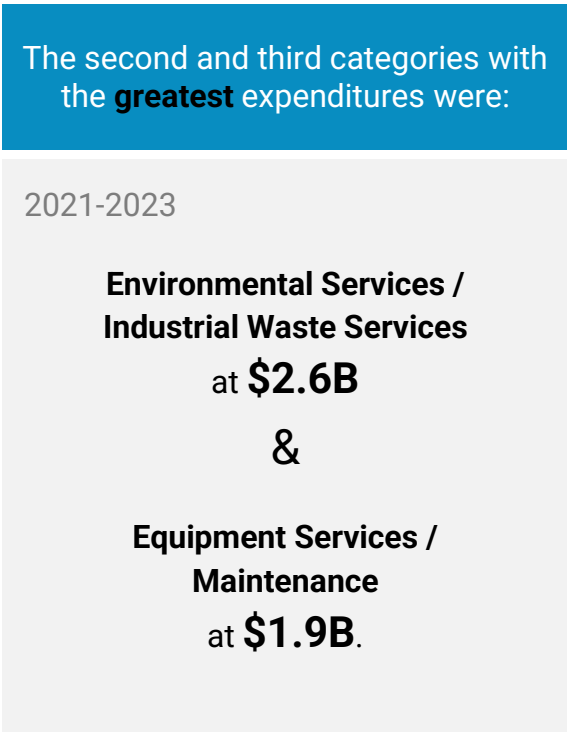
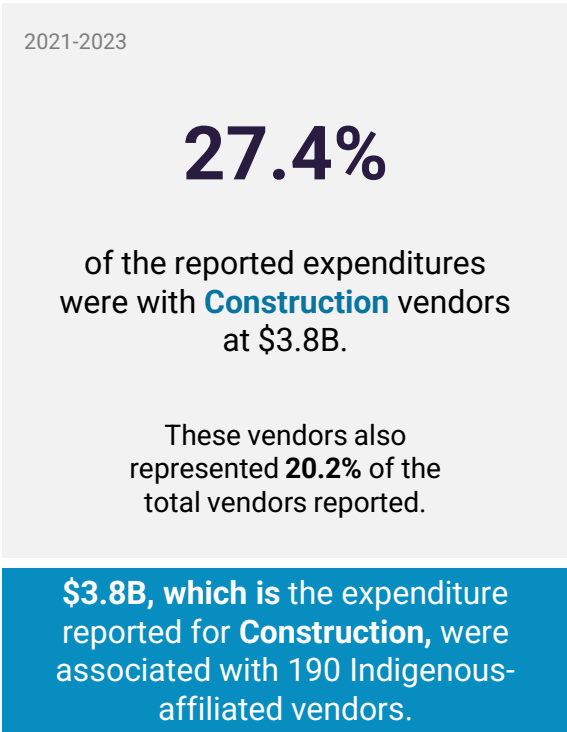
Outlines Indigenous-affiliated vendor participation and reported Indigenous investments between 2021 and 2023, with a focus on vendor distribution across key supply chain categories and types of community investment.

4

SECTION

Construction Led Indigenous-affiliated Supply Chain Contributions, followed by Environmental Services and Equipment

The Indigenous-affiliated Supply Chain Category with the Greatest Expenditures reported between 2021 and 2023 was **Construction**.



of the Indigenous-affiliated vendors reported between 2021 and 2023 were **Environmental / Industrial Waste Services** providers.

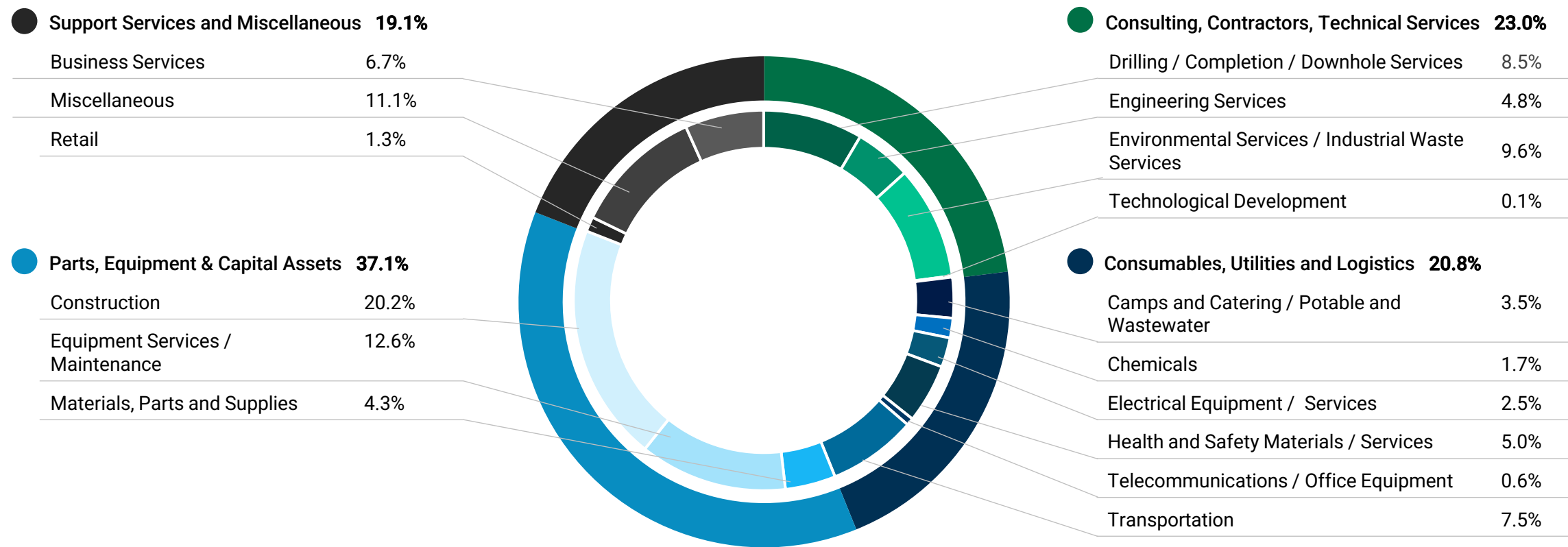


of the Indigenous-affiliated vendors reported between 2021 and 2023 were **Equipment Services / Maintenance** providers.

Note: See Appendix B for definitions of supply chain categories

Indigenous-affiliated Vendors Across Key Supply Chain Categories

Distribution of Supply Chain by Category* based on Count of Indigenous-affiliated Vendors reported between 2021 and 2023



* See Appendix B for definitions of supply chain categories

Snapshot of Indigenous-affiliated Supply Chain Diversity in Key Urban Centres

| Locality | Top Supply Chain Category by Expenditures between 2021-2023 |
|----------------|---|
| Airdrie | Electrical Equipment / Services |
| Calgary | Drilling / Completion / Downhole Services |
| Edmonton | Construction |
| Fort McMurray | Construction |
| Grande Prairie | Construction |
| Lethbridge | Construction |
| Red Deer | Drilling / Completion / Downhole Services |
| Spruce Grove | Environmental / Industrial Waste Services |

Indigenous Community Investment Grew by 24.9%* between 2021 and 2023

\$58.6M

in Indigenous community investments was allocated to **195**** Alberta-based **organizations** located across more than **65**** Alberta **municipalities** and associated with **45^** **Indigenous communities** in Alberta between 2021 and 2023.

| Community Investment Growth | 2021 | 2023 | % Change* 2021-2023 |
|---|---------|---------|------------------------|
| Community Investment Expenditures | \$17.9M | \$22.4M | 24.9% |
| Number of Community Investment Recipients** | 110 | 140 | 27.3% |

Top Three Community Investments by Expenditure



Indigenous Community
Development



Family Wellness



Education

Additionally, more than \$8.4M
in Capacity Funding

was distributed to Indigenous
Nations between
2021 and 2023.

Capacity funding increased by
246.5%* from 2021 to 2023.

Note: Community investment data was received from 11 out of 12 participating members.
* Percentage change are calculated on actual values for accuracy and do not consider the rounded values presented for readability.
** Some of the Community Investment data was submitted without recipients and specified location information.
^ There are more Indigenous communities from other provinces associated with the organizations based in Alberta that are not counted here.

'Indigenous Community Development' Investment Category Led all Contributions

Indigenous Community Investments by Category across Alberta in between 2021 and 2023

| Top Categories for Indigenous Community Investment* | Expenditure Amount | Number of Community Investment Recipients** |
|---|--------------------|---|
| Indigenous Community Development | \$56.9M | 85 |
| Family Wellness | \$499.1K | 35 |
| Education | \$465.1K | 30 |
| Health | \$276.4K | 20 |
| Environment | \$138.1K | 5 |
| Arts and Activities | \$125.3K | 10 |
| Miscellaneous | \$101.6K | 15 |
| Sports and Athletic Associations | \$98.3K | 10 |
| Elder Supports | \$15.0K | 2 |
| Total Indigenous Community Investments | \$58.6M | 195^ |

* See Appendix C for Community Investment Categories definitions

** Community investment data was received from 11 out of 12 participating members. Some of the Community Investment data was submitted without recipients and specified location information.

^ Some organizations received community investment amounts in more than one CI category. Each of such organizations are counted once for the total count of community investment recipients.

Appendices

This section includes explanations on the data collection and validation processes, as well as the assumptions underpinning the analysis.

5

SECTION

Methodology

| Focus Area | Assumptions |
|------------------------------|--|
| Categorization | <ul style="list-style-type: none"> All vendor expenses were tagged to the 16 different Oil and Gas supply chain goods, materials, and service categories. Please refer to Appendix B for detailed definitions of supply chain categories. The supply chain categorization was carried out in two main steps using machine learning (ML) models: <ol style="list-style-type: none"> Step 1: A combination of several classification ML models were aggregated, trained and employed to classify vendor expenses into specific supply chain categories based on their account codes. The ML categorization process involved training algorithms to recognize and categorize patterns within the data effectively and predict the categories for submitted account codes data. The aggregated ML model was trained on validated historical categorized data from CAPP's previous Oil and Gas SVRs, achieving over 90% accuracy in predicting supply chain categories based on cost codes submitted by members. The training data for ML model was customized and carefully used, not sourced from any public data, and was enhanced specifically for each project to ensure its relevance and precision. Step 2: After the ML models provided initial classifications, all results were reviewed and quality-assured by iTOTEM's team to ensure accuracy and consistency. All the spends towards Indigenous community investment were tagged to 13 different community investment-based categories. Please refer to Appendix C for detailed definitions of community investment categories. Category percentages by vendor count are based on the total number of unique vendors for each category to show the complete representation of all the services vendors are providing to the industry. A vendor providing services in more than one category shall be counted for each of those categories separately for calculating vendor count category percentages. |
| Community Investments | <ul style="list-style-type: none"> All the expenses that are carried out for the charitable and sponsorship purposes that are beneficial to the community. |
| Geographic References | <ul style="list-style-type: none"> Vendors were tagged by municipality or unincorporated community according to the Postal Code Conversion File (PCCF) Dataset from Canada Post. Other micro-tagging included: <ul style="list-style-type: none"> Electoral Boundaries Indigenous- affiliation Supply Chain Category Community Investment Category Year |

Methodology

| Focus Area | Assumptions |
|--|--|
| Indigenous-affiliated Vendor | <p>According to Statistics Canada, ‘A business is considered Indigenous-owned if more than 50% of its shares are owned by Indigenous people—individuals who reported being First Nations (North American Indian), Métis or Inuk (Inuit); those who reported Registered or Treaty Indian status, registered under the Indian Act of Canada; or those who reported membership in a First Nation or Indian band.’</p> <p>Source: https://www.statcan.gc.ca</p> <p>Accordingly, for the SVR, the definition of Indigenous Peoples is applied, and the supply chain participation includes both majority and minority Indigenous business ownership structures ensuing commercial benefit. Without the ability to confirm majority ownership structure of each business, the SVR conservatively reports all Indigenous participation based only as being ‘Indigenous-affiliated’.</p> <p>Definition - All the vendors that are or owned by Indigenous people – individuals who reported being First Nations (North American Indian), Métis or Inuk (Inuit); those who reported Registered or Treaty Indian status, registered under the Indian Act of Canada; or those who reported membership in a First Nation or Indian band, irrespective of the ownership structure of the vendors being majority owned.</p> |
| Limitations and Notes | <ul style="list-style-type: none"> iTOTEM relied on the accuracy of the information provided by CAPP SVR participants regarding their Indigenous-affiliated supply chain and Indigenous community investment expenditures and the respective locations of the vendors in Canada. However, the same has been validated using credible data sources like PCCF dataset from Canada Post and Google Places API based in-house algorithms. |
| Province and Territories Standard Abbreviations | <p>Statistics Canada has been used as a resource for standardized abbreviations for Provinces and Territories in SVR.</p> <p>Source: Dictionary, Census of Population, 2021 - Table 1.8 Abbreviations and codes for provinces and territories, 2021 Census</p> |
| Quality Assurance Data Changes and Exclusions | <ul style="list-style-type: none"> A QA process was run to remove duplications, standardize spellings and apply exclusions. All the spends relating to taxes/levies/Government fees were excluded from the analysis iTOTEM ran a validation process with the CAPP participants to assure the data veracity. |

Methodology

| Focus Area | Assumptions |
|-----------------------------|---|
| Representation Index | <p>Representation index is a measure used to quantify the proportional representation of different groups in a particular context like demographics. iTOTEM used representation index to assess the representation of Indigenous-affiliated supply chain in Alberta's Oil and Natural Gas sector by spend and count of vendors. A value greater than 100 means Indigenous-affiliated vendors exceed representation in supply chain expenditures or number of vendors based on the Indigenous population in the province. And a value less than 100 means the supply chain expenditures or the number of Indigenous-affiliated vendors in the oil and natural gas supply chain based on the Indigenous population in the province is lower than it could be.</p> <p>The representation index for Alberta's Oil and Natural Gas sector was calculated as follows: $\text{Representation Index} = \text{Observed Representation} / \text{Expected Representation} \times 100$ Where, $\text{Expected Representation} = \text{Alberta Indigenous Population} / \text{Alberta Total Population}$ $\text{Observed Representation by Vendor Count} = \text{Count of Indigenous-affiliated Alberta's Oil and \& Gas Vendors} / \text{Total count of Alberta's Oil and \& Gas Vendors}$ $\text{Observed Representation by Vendor Spend} = \text{Indigenous-affiliated Spend of Alberta's Oil and \& Gas} / \text{Total Spend of Alberta's Oil and \& Gas}$</p> <p>Indigenous Population data source: Stats Canada https://www12.statcan.gc.ca/census-recensement/2021/as-sa/fogs-spg/page.cfm?topic=8&lang=E&dguid=2021A000248#</p> |
| Rounding | <ul style="list-style-type: none"> • \$ were rounded to the nearest billion, million or thousand. • Counts were rounded down to nearest 5s and 10s. • The rounded \$ amounts in billion, million and thousand are represented with the suffix 'B', 'M' and 'K' respectively |
| Unique Vendor Counts | <ul style="list-style-type: none"> • A vendor can be tagged in more than one municipality, but this does not change the total number of unique vendors in the province, or Canada nor does it change the total number of unique vendors in a municipality. • The unique vendor count means the vendor is counted once. In situations where the same vendor operated in more than one location, but spelling was recorded differently, the spelling was standardized, and duplications excluded. • The locations of the vendors were extracted from postal codes; postal codes were verified with Canada Post. In situations where a postal code was not provided, an additional validation process, involving google places API base in-house application, was applied; failing this, the vendor location is part of the margin of error. |
| Vendor | Contractors/Consultants and other professionals, materials as well as goods and service providers to the member companies of Canadian Association of Petroleum Producers (CAPP) |

Supply Chain Categories

| Category | Description |
|--|--|
| Business Services | Companies involved in consulting on business practices and business efficiencies, e.g. accounting, legal. Includes training and staffing |
| Camps & Catering / Potable & 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 & 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. |

Supply Chain Categories

| Category | Description |
|--|---|
| Materials, Parts and Supplies | Companies providing basic materials and unfinished goods and/or spare parts to the oil and natural gas industry such as steel, plastics, nuts, bolts, filters, small piping, etc. |
| Retail | Companies falling outside the realm of the oil and 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. |

Indigenous Community Investment Categories

| Type of Community Investment | Description |
|------------------------------|--|
| Arts and Activities | To advance the public's appreciation of the arts by providing high-quality artistic performances. To advance the public's appreciation of the arts by producing public art exhibitions, presentations, and performance art(s) events, and by providing a forum for qualified artists to exhibit, present, or perform their artistic works through participation in such events. |
| Education | To provide knowledge or develop abilities by deliberate teaching or training. Training that provides knowledge or develops abilities and describes the criteria they must meet. |
| Elder Supports | <p>To relieve conditions attributable to being elderly by:</p> <ul style="list-style-type: none"> • Providing specially adapted residential accommodation, incidental facilities, and support. • Providing personal care, housekeeping, meals, nursing, shopping assistance, and transportation to medical appointments. |
| Environment | To protect the environment for the benefit of the public by conserving or restoring ecosystems and biodiversity on a long-term basis and to reduce pollution. |
| Family Wellness | <p>To address and prevent specific problems faced by families by:</p> <ul style="list-style-type: none"> • Establishing and operating an assessment and counselling center for children, youth, and parents dealing with behavior management issues. • Providing parents, children, and youth with mentoring programs, workshops, and seminars on issues such as anger management, conflict resolution, and effective communication. |

Indigenous Community Investment Categories

| Type of Community Investment | Description |
|--|--|
| Health | The promotion of health means to directly prevent or relieve a physical or mental health condition by providing effective health care services or products to the public in a manner that meets applicable quality and safety requirements. |
| Indigenous Community Development | A financial contribution aimed at supporting the long-term growth, sustainability, and well-being of Indigenous communities. These donations fund initiatives that enhance local economic development, cultural preservation, social programs, or infrastructure projects. Unlike capacity funding, which focuses on enabling participation in projects, these donations directly support community-led efforts to build self-sufficiency and resilience. These contributions also includes the Indigenous social investments via impact benefit agreements. |
| Miscellaneous | Donations or sponsorships that do not fall under any of the categories listed in this table. These can typically be donations to people or vendors without any explanations. |
| Promoting Commerce or Industry | To promote and maintain efficiency and high standards of practice by developing training programs and providing funds for the training of individuals engaged in the industry, trade, or profession; conducting research on best practices related to that industry, trade or profession and disseminating the results of the research to the public. |
| Protecting and Preserving Heritage Sites | To protect and preserve significant heritage sites by restoring, developing, and maintaining the historic site with a view to commemorating the site and educating the public about it. |
| Public Amenities | To provide a public amenity by establishing and maintaining: <ul style="list-style-type: none"> • A memorial garden for the public • Parks and playgrounds • Multi-use recreational facilities |
| Sports and Athletic Associations | Canadian amateur athletic associations that promote the sport. |
| Supporting the Canadian Armed Forces and Emergency Services | To promote the efficiency of the Canadian Armed Forces for the benefit of the public by providing air, sea, or army cadet training to youth. |

Capacity Payments / Capacity Funding

| Term | Description |
|--------------------------------------|--|
| Capacity Payments / Capacity Funding | Financial support aimed at building and strengthening the ability of Indigenous communities to participate meaningfully in projects, programs, or initiatives. This includes funding for administrative support, training, technical expertise, community consultation, and other resources that enable communities to manage and engage effectively in economic development or partnership opportunities. |

Application of the Indigenous-affiliation Reporting Transparency Pyramid

| Indigenous Reported Majority Ownership and Affiliation Indicators | Count |
|---|------------|
| Total Number of Indigenous Vendors Submitted | 587 |
| Total Number of Validated Indigenous Vendors (Validated through CCIB, ISC and Indigenous Nations) | 165 |
| - Indigenous Vendors Validated Through CCIB | 87 |
| - Indigenous Vendors Validated Through ISC | 52 |
| - Indigenous Nations / Bands | 26 |
| Total Number of Indigenous-affiliated Vendors Reported, but Without Majority Ownership Validation | 422 |
| - Indigenous Vendors Submitted by Two or More Members | 94 |
| - Indigenous Vendors Submitted by One Member Only | 328 |

- Process Step One: The vendors or organizations are cross-referenced with Indigenous business directories from Indigenous Services Canada (ISC) – **Indigenous Business Directory** and the Canadian Council for Indigenous Business (CCIB) – **Certified Aboriginal Business Program** to verify if they are listed.
- Process Step Two: For entities not listed in the ISC and CCIB directories but reported as being associated with Indigenous participation, they are classified as Indigenous affiliated. iTOTEM records the number of member companies that report a vendor or organization as Indigenous. This count represents the probability of Indigenous affiliation. For example, if one Member reports a business as Indigenous-affiliated, the count is one. If three members report the same business, the count is three. See the **Indigenous-affiliation Reporting Transparency Pyramid** in the Guidance Documentation.

iTOTEM Analytics, with offices in Vancouver, B.C., and Houston, Texas, is an integrated data science and communications firm that transforms complex technical data into hyper-local insights on investment impacts.

Our value proposition is share worthy content that builds trust, mobilizes support, and strengthens advocacy.

Using advanced data science, we simplify information gathering and content creation to deliver insights that matter—focused on what elected officials, community leaders, and the public care about: their neighborhoods, economic progress and responsible development.

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