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THE VIEW FROM BUSINESS

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ALBERTA FUTURES PROJECT PRE-PUBLICATION SERIES

Alberta has a long history of facing serious challenges to its economy, including shocks in the form of resource price instability, market access constraints, and federal energy policies. However, the recent and current challenges seem more threatening. It seems that this time is truly different.

The collapse of oil and gas prices in 2014 combined with the rapid growth of U.S. oil production, difficulties in obtaining approval for infrastructure to reach new markets and uncertainty regarding the impacts of climate change policies world-wide have proven to be strong headwinds for the province's key energy sector. Together, the negative effects on employment, incomes and provincial government revenues have been substantial. To make matters worse, in early 2020 the Covid-19 pandemic struck a major blow to the lives and health of segments of the population and to livelihoods in many sectors. The result has been further employment and income losses, more reductions in government revenues and huge increases in government expenditures and debt. These events, combined with lagging productivity, rapid technological shifts, significant climate policy impacts and demographic trends, call for great wisdom, innovation, collective action and leadership to put the province on the path of sustainable prosperity.

It is in this context that we commissioned a series of papers from a wide range of authors to discuss Alberta's economic future, its fiscal future and the future of health care. The plan is that these papers will ultimately be chapters in three e-books published by the School of Public Policy. However, in the interest of timeliness and encouraging discussion, we are releasing selected chapters as pre-publications.

INTRODUCTION

It is an understatement to say the COVID-19 pandemic and resulting global recession that coincided with a historic collapse of oil prices presented an unmatched challenge for Alberta business. This combination of circumstances presented not only a unique challenge for businesses, but also a unique challenge for the organizations that serve them.

The Alberta Chambers of Commerce (ACC) has been directly involved in supporting businesses and business organizations as they navigate and attempt to survive these economic circumstances. As the advocate for Alberta business, the ACC also continuously advances business interests, working to create a competitive business environment and position Alberta for future economic stability and growth. Given the significant and ongoing economic challenges Alberta is facing, this role has become increasingly important over the course of the COVID-19 pandemic and oil price collapse. It is this advocacy work that will be the focus of this paper.

This paper will start by providing background on the ACC and the process and sources that inform its advocacy. Then, it will highlight key gaps and opportunities for Alberta's business operators and decision makers as well as relevant ACC policy to help address these gaps. Where relevant, it will also briefly discuss active ACC initiatives designed to contribute to the province's economic recovery.

BACKGROUND

The main role of the Alberta Chambers of Commerce is to advocate on behalf of Alberta business. Unlike the traditional chamber of commerce model, the ACC's primary members are not individual businesses. Instead, the organization represents 122 community-based chambers of commerce across Alberta which, in turn, represent more than 24,000 businesses. While Alberta's community chambers range widely in size and scope, there is at least one chamber in each federal and provincial electoral district. Each community chamber is a member of the ACC, a situation that is unique within Canada. The comprehensive membership of the ACC federation allows Alberta's chambers to speak with a unified voice, effectively representing businesses of all sizes across all regions of the province. The programs and advocacy work detailed in this paper are efforts of this entire Alberta chambers network rather than the Alberta Chambers of Commerce alone as a narrowly defined organization. As shorthand, this paper will refer to the collective work of this federation as simply "the ACC" or "the ACC network".

While this paper focuses on the path forward from the economic challenges of 2020-2021, a brief treatment of ACC work in the period leading up to this time is necessary to provide context for current recommendations. Although a multitude of factors over many years have influenced Alberta's current economic situation, this paper will focus on the advocacy and recommendations informed by three recent sources: the official policy positions developed and adopted by the ACC network, the Vision 2020 white paper series and the Alberta Perspectives market research program. This paper will provide a brief overview of each of these three initiatives below.

The foundation of ACC advocacy is official policy positions of the Alberta chambers network, which are established during the annual policy cycle. Each year, Alberta's community chambers submit policy proposals for consideration during the network's annual general meeting. Policy proposals must meet four criteria: be specific and complete; be reasonable, relevant and attainable; include recommendations capable of being assessed, measured or evaluated; and be of provincial, national or international importance. At the annual general meeting, accredited voting delegates may approve, defeat or refer proposed policies. Proposed policies must be approved by a majority of voting delegates in order to be adopted as official ACC positions.

Approved policy positions remain valid for three years, at which point they are either allowed to lapse (if, for instance, the policy outcomes have been achieved or the recommendations are no longer topical) or may be updated and submitted for renewal by a sponsoring community chamber. ACC policy positions span a vast range of topics and may include any recommendations within the jurisdiction of either the provincial or federal government.

In terms of more specific advocacy projects, Vision 2020 was a public policy research project conducted by the ACC in partnership with Certified General Accountants (CGA) of Alberta. Vision 2020 was a broad-based project designed to better understand Canada and Alberta's social and economic policy options. The project resulted the publication of four white papers between 2004 and 2010, which are available to view on the ACC website.

Nearly a decade after the final white paper of Vision 2020 was published, the ACC embarked on another large-scale research program. In May 2019, almost immediately following that year's provincial election, the ACC launched an ongoing market research program called Alberta Perspectives. The purpose of the Alberta Perspectives program is to gather high-quality, longitudinal data from Alberta's business community and public alike. The program centres on three areas of strategic interest: provincial priorities, municipal competitiveness and skills and labour market policy. The data gathered through this program then informs ACC network advocacy to local, provincial and federal governments. To ensure statistical validity and rigor of the program, the ACC has contracted the Canadian research advisory firm The Strategic Counsel to assist with survey administration and analysis.

The Alberta Perspectives market research program complements the traditional policy process detailed above, both by providing up-to-date data for policy drafters to reference and by enabling the ACC to quickly respond to rapidly emerging or developing issues. By monitoring numbers and regions of respondents, the ACC and The Strategic Counsel can confirm survey data reflect a representative sample — ensuring the resulting advocacy accurately reflects Alberta's business community.

In 2020, the ACC expanded the Alberta Perspectives program by launching Alberta's first online business insight community. The Alberta Perspectives community is an online hub designed to gather additional insights on emerging issues, with granularity down to the postal code. With more than 750 business leaders registered to the community as of March 2021, the ACC network has been able to track impacts of the oil price decline and COVID-19 pandemic on Alberta's business community almost in real time.

GAPS AND OPPORTUNITIES

A persisting finding of the Vision 2020 research project was the importance of fiscal prudence. In 2005/06, the ACC and CGA estimated Alberta could save between 30 and 40 per cent of all non-renewable resource revenue each year without requiring significant corresponding spending cuts (Milke 2006). Fifteen years after this finding, Alberta is in a precarious financial position, in large part due to a collapse in energy prices and therefore significantly diminished resource revenues. A recent Fraser Institute article shows that as of 2010, the Alberta had no net debt and therefore modest debt interest payments of \$472 million, representing 1.2 per cent of annual revenues. However, by 2019, debt interest payments had increased to \$2.2 billion (4.8 per cent of government revenue) and are forecasted to climb even further to \$2.8 billion (6.3 per cent of revenue) for the 2021/22 fiscal year (Eisen and Lafler 2021). Meanwhile, the debate of how to best steward non-renewable resource revenues has continued over this period, but without the buffer of provincial savings or the same revenue potential from non-renewable energy sources.

Those involved in Vision 2020 were not anticipating the unprecedented economic pressures of a global pandemic coinciding with a historic energy price collapse. And indeed, it would be hyperbolic to claim saving 30 to 40 per cent of non-renewable resource revenues through the Heritage Fund would have completely avoided the fiscal situation Alberta is in as of 2020/21. However, the benefit of hindsight has further reinforced this recommendation of fiscal prudence and, even greater, has reinforced the importance of responding to recommendations from Alberta's business community. After all, Alberta's business operators — and the Albertans they employ — are among the hardest hit when an economic disruption inevitably occurs. Had Alberta's governments over the past 15 years saved 30 to 40 per cent of non-renewable resource revenues, the province would undeniably be in a better position to weather this economic storm.

The Alberta Perspectives research program has also broadly examined business and public opinions around the province's finances and fiscal management. As of July 2020, 68 per cent of business respondents and 51 per cent of public respondents perceived Alberta's financial situation to be either "poor" or "very poor", compared to 51 per cent and 44 per cent respectively the year prior (The Strategic Counsel 2020c, 20). In the same survey, 92 per cent of business respondents and 89 per cent of public respondents indicated they were either "very concerned" or "somewhat concerned" about the state of the province's finances (The Strategic Counsel 2020c, 20).

In terms of fiscal management, as of July 2020, a majority of both business and public survey respondents considered Alberta running a deficit for a number of years to be unacceptable. Fifty-five per cent of business respondents and 50 per cent of public respondents saw running a deficit to be unacceptable — a decrease in both categories from 2019, when 69 per cent of business respondents and 69 per cent of public respondents believe a deficit was unacceptable (The Strategic Counsel 2020c, 24). In other words, businesses and members of the public alike viewed deficits as more acceptable in 2020 than 2019, likely due to the COVID-19 pandemic.

On the whole, and especially considering these findings, the ACC supports the recommendations of the MacKinnon Report on Alberta's Finances as a path to restoring the province to balanced budgets. The ACC policy "Returning Alberta to Balanced Budgets" also makes the following specific recommendations:

1. Establish a long-term plan to achieve a balanced budget by eliminating operational expenditure growth.
2. Adopt an ongoing position of fiscal restraint and controlled spending by launching a full program and service review, including input from external stakeholders, as is being done in Alberta's largest cities, and report publicly on the results of this review.
3. Consult broadly with external stakeholders regarding the optimal approach to stabilize government revenues and expenditures, including an assessment of all available revenue options and tools, as well as cost containment, service level examination and fiscal restraint measures.
4. Negotiate government labour agreements due for renewal with a target of no staffing increases and zero percent increases in salaries until the currently depressed labour market has turned positive and rebounded sufficiently to justify wage growth (Alberta Chambers of Commerce 2018b)

While Alberta Perspectives research highlights challenges with government spending, it also focuses on the revenue side of the equation. In terms of public opinion, there is significant support from both the business community and members of the public for diversification. July 2020 Alberta Perspectives survey findings identified the diversification of Alberta's economy beyond oil and gas as a top priority for business and public respondents alike. Sixty-three per cent of business respondents identified diversification as a "very important" priority, with 66 per cent of respondents ranking it among their top three priorities. Public support was only slightly lower, with 57 per cent of respondents believing diversification to be "very important" and 58 per cent ranking it among their top three priorities (The Strategic Counsel 2020c, 29). While public support stayed the same at 57 per cent from July 2019 to July 2020, business support grew from 52 per cent to 63 per cent (The Strategic Counsel 2020c, 29). Our network has been calling for a complete review of all available revenue options, with a goal to ensure stability and prudent financial planning. The growing support among those in the business community for diversification further strengthens this call.

While public opinion favours diversification, both business operators and members of the public overwhelmingly continue to view the oil and gas industry as very significant for Alberta's economy. As of July 2020, 82 per cent of both business and public respondents saw the oil and gas industry as either "vitaly important" or "very important". A majority (51 per cent) of respondents in each category also anticipated the industry would continue to be as important as it is today over the next few years (The Strategic Counsel 2020c, 19).

Alberta Perspectives data also highlight the potential for enhanced governance through engagement with the business community. While the data gathered through

Alberta Perspectives cannot establish causation, they suggest a strong correlation by drawing on representative samples.

A key finding of this research is that government engagement with business operators correlates with increased business confidence. Overall, more than half of business (57 per cent) reported a negative view on the long-term future of the province as of December 2020 (The Strategic Counsel 2020a, 16). However, those who had been contacted by an elected official were slightly more positive (42 per cent) about Alberta's long-term future than those who were not (36 per cent) (The Strategic Counsel 2020a, 16).

Again, this finding can only be understood as a correlation due to the nature of these data. However, logically, the finding that increased communication with decision makers enhances business confidence makes sense. Even without establishing causation, there is little risk, but significant potential benefit, to elected officials increasingly making intentional contact with local business operators. The data indicate three quarters of business respondents (74 per cent) have not been contacted by an elected official of any order of government within the last year (The Strategic Counsel 2020a, 22). This finding highlights a major gap in — and opportunity for — government engagement, particularly given the unique challenges Alberta businesses continue to face. With a majority of business respondents maintaining a negative view in the long-term future of the province, this research suggests increased outreach of elected officials could positively impact the attitudes of business operators. It is reasonable to hypothesize that improved confidence of business operators could positively impact their actions as Alberta heads towards economic recovery.

Alberta Perspectives labour market research shows that despite Alberta's many choices for high-quality primary, secondary and post-secondary education, there is a clear gap in development of in-demand skills. As of April 2020, more than half of business respondents found it difficult to hire people with the entry-level (54 per cent) or mid-level (65 per cent) skills they needed (The Strategic Counsel 2020b, 16). Forty-four per cent of these same business operators also anticipated skills shortages would have a significant or moderate impact on their business's ability to thrive over the next year (The Strategic Counsel 2020b, 17).

While identifying gaps, this research also provides guidance on specific skill gaps and in-demand competencies. In April 2020, the ACC asked business operators to identify both the top five people skills and competencies and top five technical skills and competencies they look for when hiring at any level within their organization. Survey respondents indicated the top people skills and competencies they look for to be problem-solving skills (60 per cent), service orientation (56 per cent) and commitment to quality (54 per cent) (The Strategic Counsel 2020b, 14). Among their top technical skills, business operators primarily looked for industry-specific technical skills (61 per cent) followed by fundamental skills: basic numeracy and literacy (54 per cent); basic business acumen (44 per cent); and basic science and math skills (33 per cent) (The Strategic Counsel 2020b, 14). While final analysis is not yet complete at the time of writing, early results from the same survey conducted in 2021 show a similar breakdown.

As a result of longstanding engagement with job creators and — more recently — Alberta Perspectives research, a priority of the ACC network is to align skill development with labour market needs. The ACC has increasingly been involved in facilitating connections between the business and educational communities to help bridge this gap, drawing on proven models including MicroSociety and business apprenticeship. In fact, it is specific ACC policy to “[e]ncourage Alberta school boards to create MicroSocieties in k-8 schools across the province with the goal of at least 1 per district by 2025” (Alberta Chambers of Commerce 2018a).

To further facilitate business-education communication, the ACC recently struck a talent development task force in partnership with the Council of Post-Secondary Presidents of Alberta (COPPOA). The mandate of the task force is to inform a provincial development strategy, with a goal of aligning post-secondary programming with business growth opportunities. The committee will also be working to expand work-integrated learning opportunities for post-secondary students, which is expected to be a key part of fulfilling this goal. The task force is made up of individuals from post-secondary institutions, the business community and funding leaders representing regions across the province.

The final area this paper will cover is the broad opportunity of enhanced business competitiveness. Like the topics discussed so far, it would be impossible to provide a complete treatment of Alberta’s economic competitiveness within a single paper. And indeed, all of the topics covered so far play a role Alberta’s competitiveness. However, as a starting point, this paper will outline some additional areas of note below, with a focus on municipal regulations.

Municipal regulations significantly factor into Alberta’s overall competitiveness. Broadly, Alberta Perspectives research shows municipal competitiveness is a significant area of opportunity. Based on December 2020 research, only 17 per cent of respondents would recommend their municipality as a place to invest or start a business. With 56 per cent of respondents indicating they would not recommend their municipality as a place to do business, Alberta municipalities on the whole were assigned a net promoter score of -39 at the time of this survey — a seven-point drop from the previous year (The Strategic Counsel 2020a, 30).

Through Alberta Perspectives, business operators identified a variety of local and provincial levies, taxes and fees they categorize as detrimental to their business growth and/or competitiveness. Topping this list are insurance premiums tax, small business tax, municipal franchise fees, municipal utilities and corporate income tax (The Strategic Counsel 2020a, 17). Nearly half of respondents (45 per cent) did not believe any of the charges listed in the survey benefited their business — something that may indicate the general level of frustration business operators were experiencing at the time of this research (The Strategic Counsel 2020a, 18).

The ACC has multiple current policy positions relating to economic competitiveness. For instance, the policy “Predictable, Fair and Transparent Market Value Assessments” deals with the issue of fluctuating property value assessments and the corresponding tax increases that fall on property owners. The policy includes various

recommendations to increase transparency and predictability of assessments, including clarifying methodology; increasing consultation with local experts and stakeholders; establishing specific, transparent criteria for subjective metrics; flagging irregularities and performing individual follow up; and better distinguishing between municipal and provincial roles and responsibilities (Alberta Chambers of Commerce 2020). While providing an overview of all relevant policies falls outside the scope of this paper, all current policies are posted in their entirety on the ACC website.

CONCLUSION

While the economic challenges of the COVID-19 pandemic and record low oil prices are complex and multi-faceted, research within Alberta's business community does highlight some key gaps and areas of opportunity. It would be reductionist to claim the research cited within this paper, from ACC policy positions, Vision 2020 and the Alberta Perspectives program, provides a complete treatment of issues facing Alberta business, or even a complete treatment of the specific areas discussed in this paper. Indeed, it would be impossible to fully detail in a single paper the breadth and depth of issues facing Alberta business as our province embarks towards economic recovery. Nevertheless, this research does suggest Alberta's business community — and therefore, the province's economic recovery — stands to benefit from long-term fiscal stability, diversified revenue opportunities, increased government engagement, enhanced skills training and a more competitive regulatory framework. While far from an exhaustive list, these areas of opportunity are all complex and multi-faceted within themselves. The research and policy recommendations contained within this paper are therefore only intended to suggest starting points. Most importantly, this discussion is intended to draw attention to specific attitudes and concerns of Alberta's business community. Engagement and communication with Alberta's job creators will be even more important than before as Alberta works to economically stabilize and rebuild.

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About the Author

Ken Kobly has been the President and CEO of the Alberta Chambers of Commerce (ACC) since February 2005. Ken has a background in accounting, serving as a member of the provincial board of the Certified General Accountants Association of Alberta and as president in 1988-89. In recognition of his service, Ken was honoured as one of 100 CGAs who have made a difference. He is a recipient of the Queen's Golden Jubilee Citizenship Medal, recognized as one of Alberta's 50 most influential people in 2016 by Alberta Venture Magazine, and was recognized as Canadian Chamber of Commerce Executive of the Year in 2018. Ken spent two decades on the municipal council of the Town of Beaumont and was mayor of the town for 12 years.

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