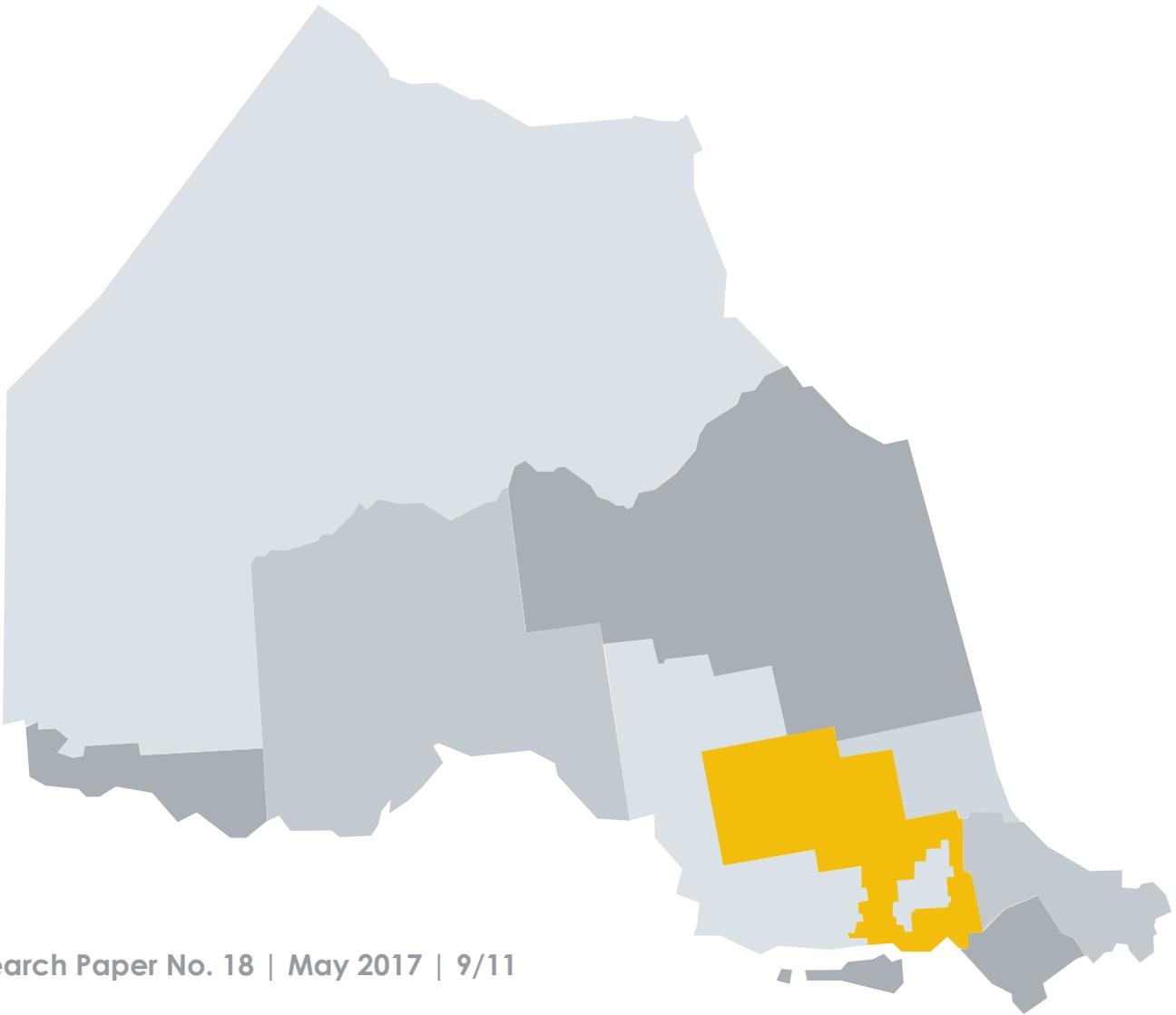


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DU NORD



**NORTHERN
ONTARIO**
WORKFORCE PLANNING



Research Paper No. 18 | May 2017 | 9/11

Northern Projections Human Capital Series - SUDBURY DISTRICT

Who We Are - Northern Ontario Workforce Planning

Workforce Planning Ontario is a network of 26 Workforce Planning Boards covering four regions across the province. Workforce Planning Boards gather intelligence about the supply and demand side of the local labour market and work in partnership with employers, employment services, educators, researchers, economic development, government and other stakeholders to identify, understand and address labour market issues. This includes supporting and coordinating local responses to meet current and emerging workforce needs.

Given the unique geography and labour market issues that impact Northern Ontario, all 6 planning boards in the north have collaborated to form Northern Ontario Workforce Planning. They include: Algoma Workforce Investment Corporation (AWIC); Far Northeast Training Board (FNETB); The Labour Market Group (LMG); Northwest Training and Adjustment Board (NTAB); North Superior Workforce Planning Board (NSWPB); and Workforce Planning for Sudbury & Manitoulin (WPSM). FNETB and NSWPB are currently pilot sites for Local Employment Planning Councils (LEPC).



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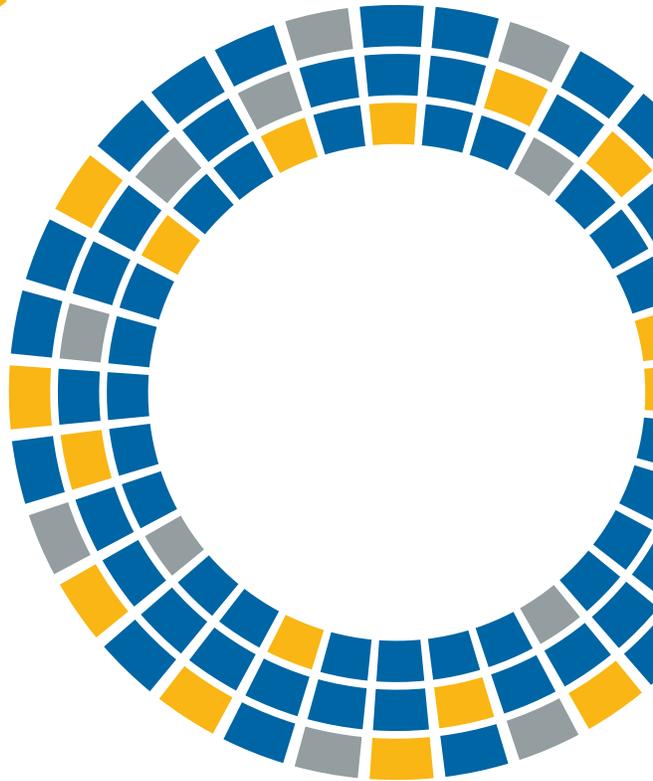
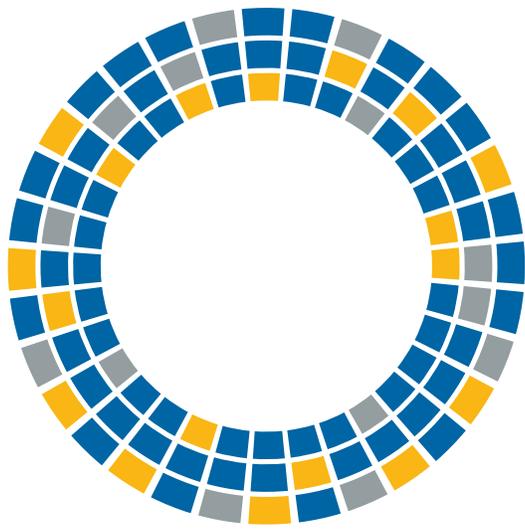
Sudbury & Manitoulin

Workforce Planning
Planification en main-d'oeuvre

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Sudbury & Sudbury Districts



This project is funded in part by the Government of Canada and the Government of Ontario.



Who We Are

Some of the key players in this model, and their roles, are as follows:

Board: The Board of Directors sets strategic direction for Northern Policy Institute. Directors serve on operational committees dealing with finance, fundraising and governance, and collectively the Board holds the CEO accountable for achieving our Strategic Plan goals. The Board's principal responsibility is to protect and promote the interests, reputation, and stature of Northern Policy Institute.

President & CEO: Recommends strategic direction, develops plans and processes, and secures and allocates resources to achieve it.

Advisory Council: A group of committed individuals interested in supporting, but not directing, the work of Northern Policy Institute. Leaders in their fields, they provide advice on potential researchers or points of contact in the wider community.

Research Advisory Board: A group of academic researchers who provide guidance and input on potential research directions, potential authors, and draft studies and commentaries. They are Northern Policy Institute's formal link to the academic community.

Peer Reviewers: Ensure specific papers are factual, relevant and publishable.

Authors and Research Fellows: Provide independent expertise on specific policy areas as and when needed.

Standing engagement tools (general public, government stakeholders, community stakeholders): Ensure Northern Policy Institute remains responsive to the community and reflects THEIR priorities and concerns in project selection.

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Author's calculations are based on data available at the time of publication and are therefore subject to change.

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James Cuddy



James Cuddy is a market analyst at the Canada Mortgage and Housing Corporation (CMHC). He has over 5 years of experience conducting research on various economic issues, with a particular focus on labour market and socioeconomic analysis and regional and urban economics.

Prior to his role at CMHC, Cuddy served as Northern Policy Institute's in-house Economist, where he played the role of principal in-house researcher who helped to expand and implement research priorities and assist in quality control.

James is a graduate of Carleton University with a B.A. in Economics (2013) and the University of Ottawa with a M.A. in Economics (2015).

Dr. Bakhtiar Moazzami



Dr. Moazzami has taught Economics and Econometrics at Lakehead University since 1988. He is well known for his research activities particularly related to Northern Ontario. He has written many reports on Northern Ontario's economic development challenges and opportunities. He was commissioned by the Ministry of Northern Development and Mines to undertake a comprehensive study of Northern Ontario's economy as a part of the research conducted for the Growth Plan for Northern Ontario. Included in the study were the identification of growing, declining and emerging industrial clusters in the region. Professor Moazzami has also written extensively on Northern Ontario's Aboriginal people and Northern Aboriginal economy. Dr. Moazzami's expertise and influence reaches beyond Lakehead University and Northern Ontario. He has been a regular guest speaker at the University of Waterloo's Economic Development Program.

Summary of Findings

The working-age population in Sudbury District is shrinking and declining

The Sudbury District's total population is expected to decrease by 18 percent from 2013 to 2041. Furthermore, the working-age population (ages 20 to 64) is projected to decline from 60.8 percent in 2013 to 46.2 percent in 2041. As a result of this decline, the supply of labour is expected to fall over the coming years.

There has been a shift in the District from the goods-producing to service-producing sectors

The shift away from the goods-producing sector has resulted in a net employment loss of over 1,800 jobs since the early-1980s. That being said, employment in the services-producing sector has grown by roughly 10 percent in the Sudbury District since this time. Since 2001, service-producing industries that experienced notable growth included information and cultural industries (82 percent) and professional, scientific and technical services (68 percent). Public administration and health care services also reported relatively strong growth during this period.

In that same time span, other occupations experienced notable growth, including occupations in art, culture, recreation and sport (75 percent), occupations in education, law and social, community and government services (60 percent), health occupations (33 percent), and management occupations (19 percent). These changes have implications on the type of education and training job seekers in the District will need to fill available jobs.

The Indigenous population is increasing

The Indigenous population in Sudbury District is expected to increase from 3,402 in 2013 to 3,962 in 2041, a growth rate of about 16.5 percent. This change will result in the Indigenous population's share of the total District's population increasing from 16.1 percent in 2013 to 23.0 percent in 2041. The share of prime-working-age (those ages 20 to 44) Indigenous people is expected to increase from 19.5 percent in 2013 to 37.5 percent in 2041 while the share of working-age Indigenous people (those ages 20 to 64) is expected to increase from 15.1 percent to 24.6 percent in this time.

Sudbury District should focus on supporting human-capital development

The human capital composition of the working-age population in the District of Sudbury is well-below that in Northeastern Ontario, and below provincial and national levels. In addition, the human capital indexes for immigrants and Francophones in the Sudbury District are lower than in Northeastern Ontario, Ontario and Canada. On the other hand, the indexes for the Indigenous labour force in this District, while below the rest of the population, are higher than national levels, but below regional and provincial levels.

There are opportunities to support workers in the District, especially on-reserve

At least partially as a result of the comparatively low overall level of education, most indicators of employment and labour force participation are lower in the Sudbury District than other areas in the Northeast and are falling.

The labour force participation rate among men is 71.2 percent in the Sudbury District compared to 75.3 percent in Northeastern Ontario and 76.0 percent in Ontario in 2011. Notably, Indigenous men living on-reserve have relatively high levels of participation compared to the Northeast and compared to those living off-reserve in the Sudbury District. Other labour market outcomes for Indigenous people who live on-reserve remain very different from those who live off-reserve. Those living on-reserve have lower employment rates and much higher unemployment rates. This represents an opportunity for the District to consider expanding economic opportunities on or near reserves.

Introduction

The objective of this report is to examine past and present trends and characteristics in the Sudbury District's economy and to forecast its future challenges and opportunities. The report focuses primarily on the supply side of the economy. The authors examine the region's labour market including its human capital composition, employment trends, the shifting occupational composition of the employed workforce, the shifting of the region's industrial composition from goods-producing to services-producing sectors, the declining share of the private sector, the District's rising dependency on the public sector, and declining labour income and gross domestic product (GDP). The report begins by examining demographic change in the Sudbury District over the past three decades and by defining and estimating various dependency indicators.

The study looks into the future and provides projections for the total and Indigenous populations of the District of Sudbury over the next three decades. From these population projections, the study estimates past, present and future trends in the size and composition of the regional labour force.

In the following section, the study defines and quantitatively measures the human capital composition of the District's workforce in the coming years. This section also discusses the implications of the growing application of technology in the production process and, accordingly, the future skill requirements of the workforce.

The report then moves on to discuss the consequences of shifting the composition of the employed labour force in Northeastern Ontario from goods-producing, dominated by private businesses, to services-producing, predominantly financed by the public sector. The study also examines the shifting occupational composition of the employed workforce, and the implication thereof for total regional income and GDP in the Sudbury District.

The study concludes with a summary and discussion of some policy implications.

Data Sources

Most of the data used is based on detailed information regarding individual census subdivisions (CSDs) in the Sudbury District and Northeastern Ontario obtained through special tabulations from Statistics Canada. Except for the population data, the 2011 data is based on the 2011 National Household Survey (NHS). Total population forecasts are based on data made available by the Ontario Ministry of Finance. Census 2016 data are being released in stages between February, 2017 and November 2017. At the time of

publication, only population and dwelling count data had been released. Population figures have been added to this publication, where applicable, however, the vast majority of the data presented in this publication rely on Census 2016 data that will be released later in 2017. Thus, the majority of the data presented in this report are based on the 2011 National Household Survey.

Population Groups Studied

The report provides information on the following four population groups:

- the total population;
- the Francophone population, defined as individuals who report their mother tongue to be French;
- the Indigenous population, defined by Statistics Canada as persons who reported identifying with at least one Indigenous group – that is, North American Indian, Metis or Inuit – and/or those who reported being a Treaty Indian or a registered Indian, as defined by the Indian Act, and/or those who reported they were members of an Indian band or First Nation; and
- the immigrant population defined as persons who are, or have ever been, landed immigrants in Canada.

The Geographical Specification of Northeastern Ontario

Northern Ontario is subdivided into Northwestern and Northeastern Ontario. The three most western Census Districts – namely Rainy River, Kenora and Thunder Bay – constitute Northwestern Ontario. The region that lies north and east of Lakes Superior and Huron constitutes Northeastern Ontario. It is defined to include the following census divisions: Cochrane, Timiskaming, Algoma, Sudbury, Nipissing, Manitoulin, Parry Sound and Greater Sudbury. The federal government and FedNor also include Muskoka District in their definition of Northeastern Ontario. The provincial government removed the District of Muskoka from the jurisdictional area of the Ministry of Northern Development and Mines and the Northern Ontario Heritage Fund in 2004, but has continued to include Parry Sound as a Northern Ontario division.¹

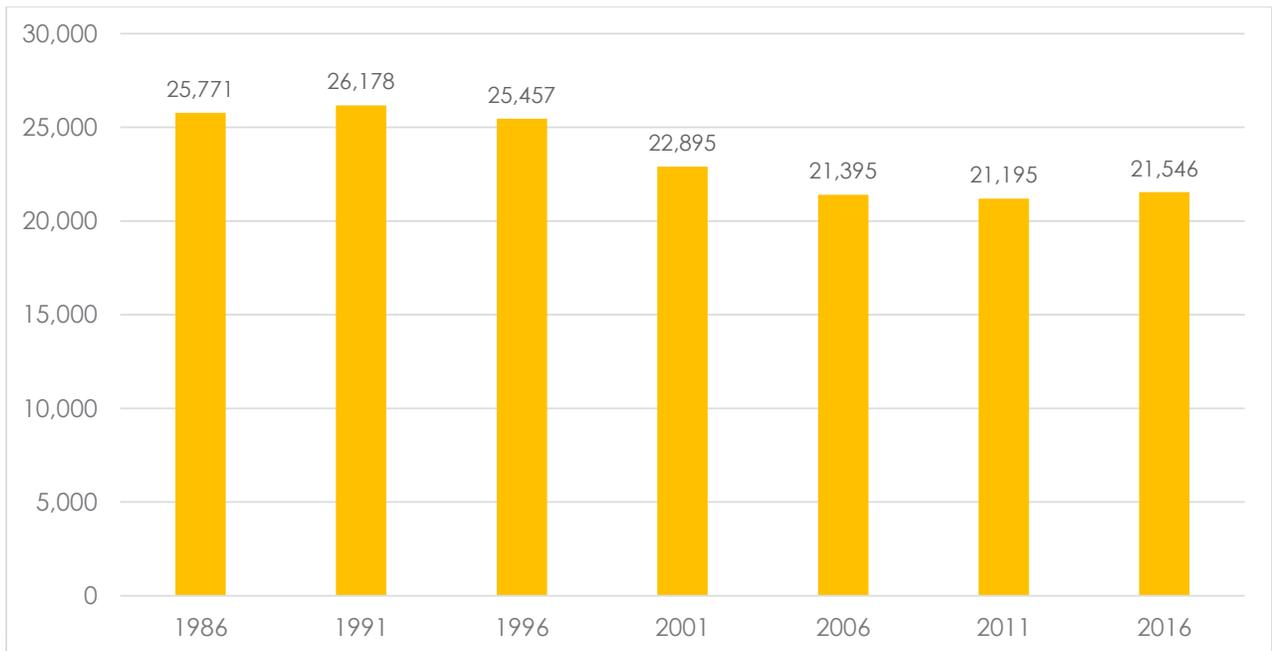
¹ The analysis in this study is based on these jurisdictional and geographic parameters. Please note that Statistics Canada has historically experienced significant challenges collecting data about the indigenous population in Canada. While many improvements have been made, it is still generally believed that the official figures understate that population. The analysis included here should be interpreted in that context.

Demographic Change: The Past Three Decades

Sudbury District covers 40,205 square kilometers and recorded a population of 21,546 in 2016. It has a population density of 0.5 persons per square kilometer which is well below that of Ontario (14.8). According to Statistics Canada's census of population, Sudbury District's population declined by about 17 percent from 1986 to 2006, and has remained relatively steady since then (Figure 1).

In terms of net migration flows, the Sudbury District has experienced negative net intraprovincial migration for the last decade, as more individuals from Ontario have moved out of the District than into the District. Interprovincial migration, known as the movement of individuals from one province to another, has also been consistently negative during this period, but has been declining in the last decade. Thus, the total domestic out-migration in 2014-15 was 297 (Figure 2). Also contributing to population levels is low and declining immigration in this District (Figure 2). As of 2015, the District attracted 3.9 immigrants per 10,000 people compared to 64.8 in Ontario, which translates into over 16 times fewer immigrants attracted per capita in the Sudbury District compared to the province as a whole (Figure 3).

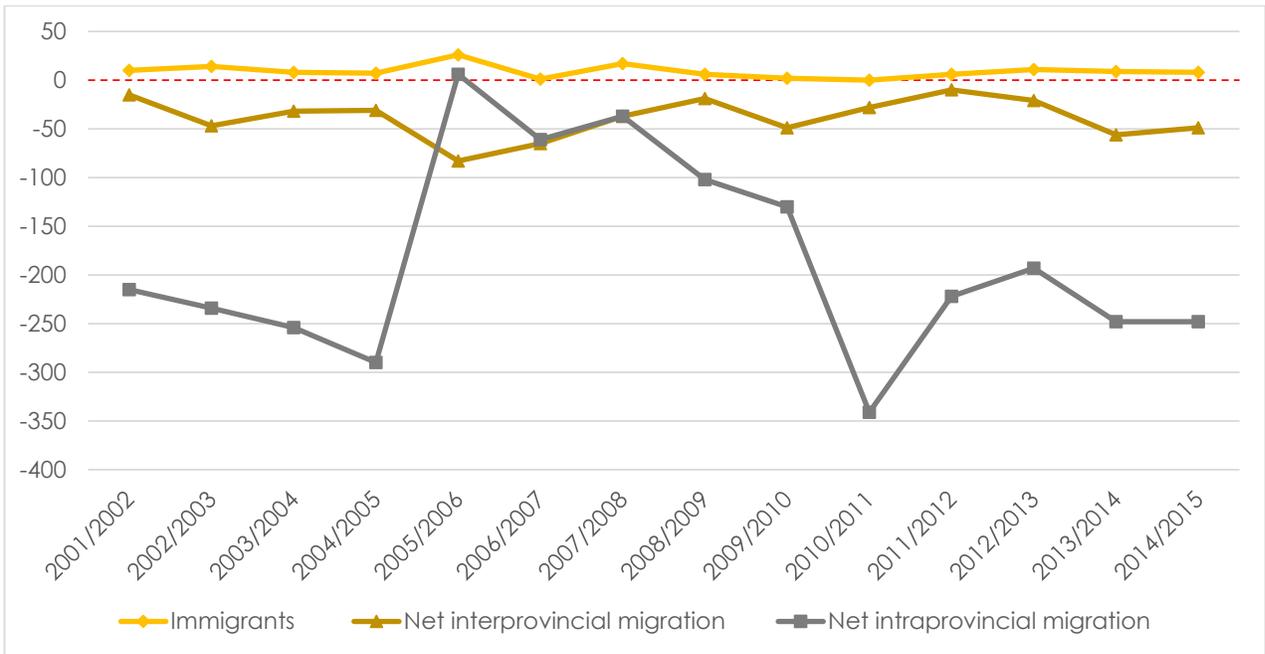
Figure 1: Population, Sudbury District, 1986–2016



Source: Statistics Canada, Census of Canada; and *idem*, National Household Survey.

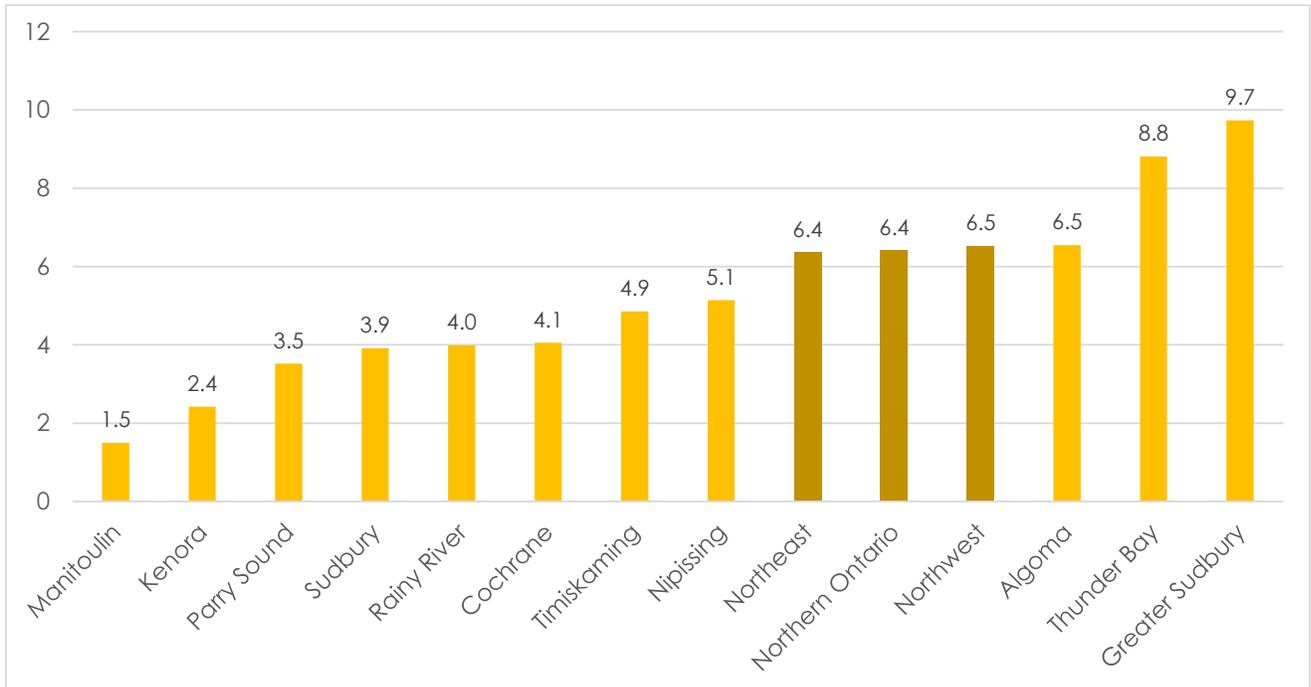


Figure 2. Net Domestic Migration and Immigration, Sudbury District, 2001/2002–2014/2015



Source: Author's calculations based on Statistics Canada, CANSIM database, table 051-0063.

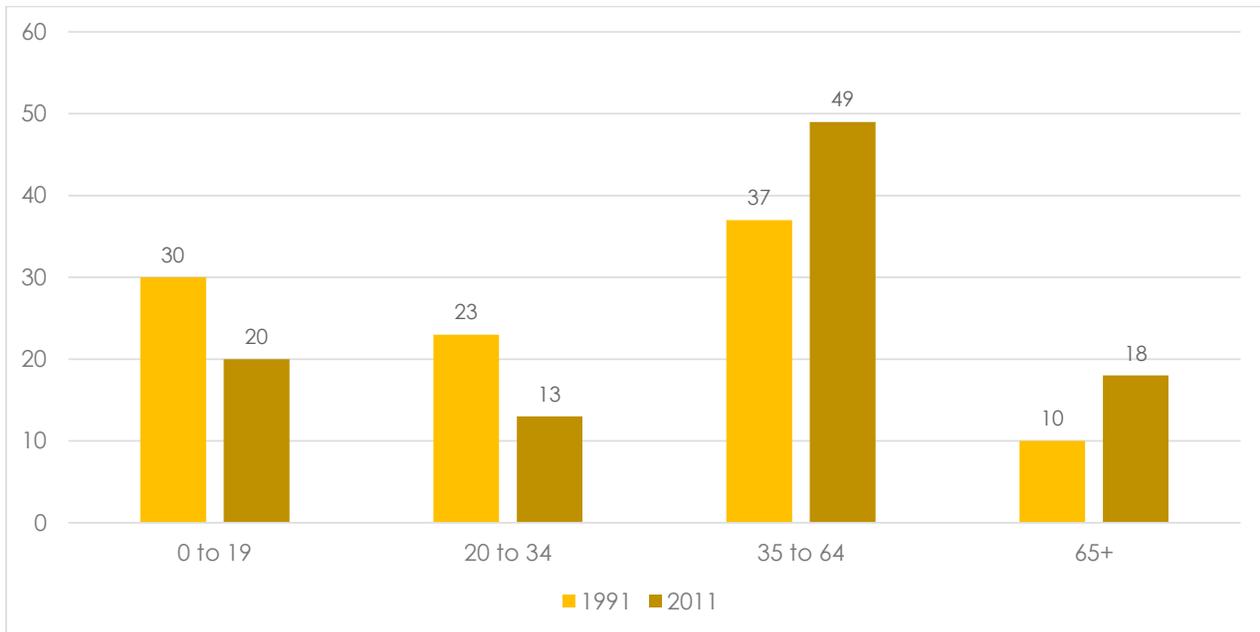
Figure 3. Number of Immigrants per 10,000 people, Northern Ontario Districts, 2014/2015



Source: Author's calculations based on Statistics Canada, CANSIM database, table 051-0062 and 051-0063.

In addition to migration patterns and low levels of immigration, rising life expectancy and lower fertility rates have resulted in the aging of the District's population. At the same time, the large baby-boom generation, born in the two decades following the Second World War, is now beginning to retire. The generations that followed were much smaller, primarily due to a declining fertility rate. As a result, the share of individuals in the District below the age of 20 has declined from 30 percent in 1991 to 20 percent in 2011 while the share of seniors rose from 10 percent in 1991 to 18 percent in 2011 (Figure 4). During the same period, the share of individuals between the ages of 20 to 34 declined from 23 to 13 percent, while individuals aged 35 to 64 increased from 37 to 49 percent.

Figure 4: Age Distribution of Population, Sudbury District, 1991 and 2011



Source: Author's calculations based on Statistics Canada, Census of Canada, and National Household Survey, custom tabulation.

These demographic changes have had a significant impact on social and economic conditions in the District. The population will continue to age in the foreseeable future, with implications for the supply of labour, production capacity, and the ability of the District of Sudbury to stay economically viable. One important aspect of the aging population relates to the relationship between economically active and economically dependent age groups – that is, between the working population on the one hand and the young and elderly on the other.

This study examines three dependency ratios: old age dependency, defined as the number of persons ages 65 years and older relative to the working-age population (ages 20 to 64); youth dependency, defined as the ratio of the number of persons ages 20 years and younger to the working-age population; and total dependency ratio, defined as the ratio of the total dependent population, which is essentially the number of mouths to feed, to the working-age population. This last ratio is a crude measure of the burden or cost associated with demographic change in terms of raising and educating children as well as taking care of the elderly at any given time. Assuming jobs are available for the working-age population, a rising dependency ratio suggests that there are more dependent persons per each member of the working-age population. A declining dependency rate implies that there are more working persons per dependent, enabling a region to reap the benefits of increased production capacity, therefore lowering the costs associated with the declining proportion of dependents.

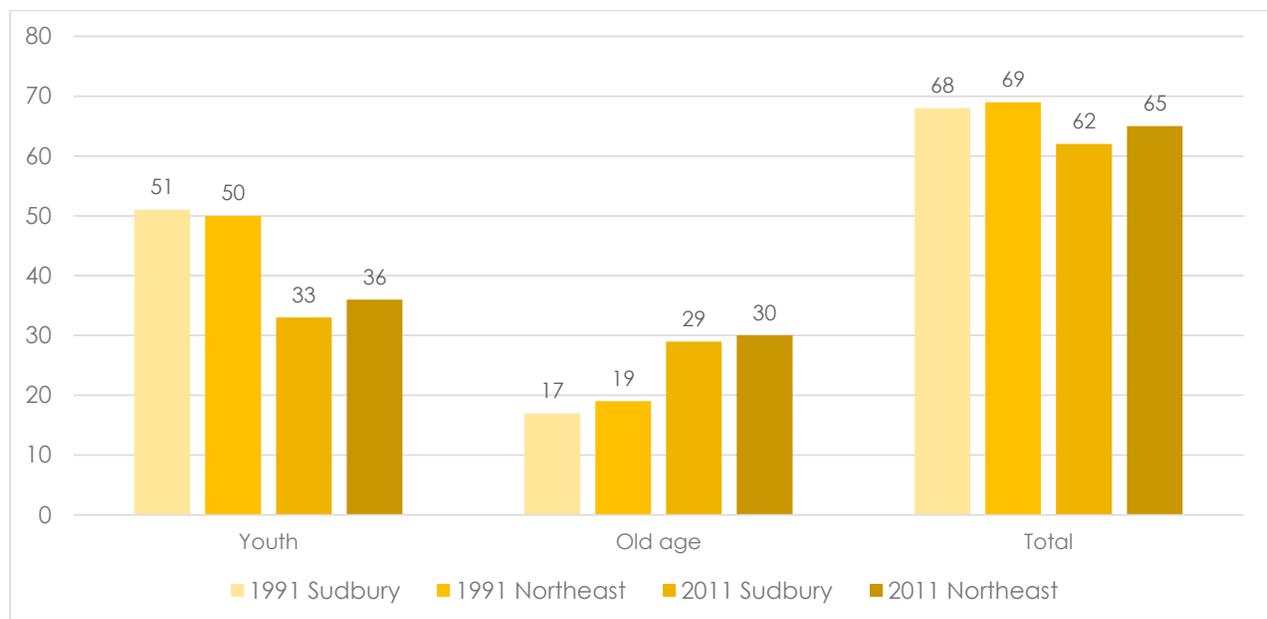


Figure 5 shows that, in the Sudbury District, the youth dependency ratio declined from 51 persons per every 100 working-age persons in 1991 to 33 in 2011 due to the fact that the number of youth declined much faster than the number of working age persons. During the same period, the youth dependency index declined from 44 to 38 youth to every 100 working age persons in Ontario.

At the same time, the old age dependency rose from 17 to every 100 working age individuals in 1991 to 29 in 2011 due to an increasing number of seniors relative to the working age population. In other words, there were 5.9 working persons in 1991 per each senior, but only 3.4 working persons per senior in 2011. The ratio of seniors to working age population in the Sudbury District (29) is notably above the provincial value of 24 to every 100 working age persons in 2011. Having higher old age dependency ratios can have budgetary implications related to health care and other expenditures required to care for the seniors in the coming years. This ratio is expected to continue to rise as working age persons retire and change their status from working to retired in the future.

Overall, the total dependency rate – the number of youths and seniors relative to those of working age – declined from 68 in 1991 to 62 in 2011, suggesting the District increased its capacity to support its non-working population over the period (this rate was the same as the provincial average in 2011). This ratio is expected to rise as the baby boomers start to retire in the coming years. Decreasing the gap between the dependency ratios in the Sudbury District and those of the province as a whole could be a goal the District might strive to achieve in the long term.

Figure 5: Ratio of the Working-Age Population to Other Age Groups, Sudbury District, 1991 and 2011



Source: Author's calculations based on Statistics Canada, Census of Canada, and National Household Survey, custom tabulation.



Demographic Change: The Next Three Decades

This part of the study provides population projections for the Sudbury District, both for the total population and for the Indigenous population. Estimates for the former are based on projections by the Ontario Ministry of Finance; estimates for the latter are based on Northern Ontario's Demographic Model, developed by Bakhtiar Moazzami.

A few words regarding the Ministry of Finance projections are in order. First, the Ministry's 2011 population estimates are about 405 greater than those reported by the 2011 census, having been adjusted for net undercoverage by the census, especially of the District's Indigenous population in the Sudbury District.

Second, the Ministry's estimated parameters for fertility at the census division level were modelled to maintain regional differences. The census division-to-province ratio for mean age at fertility in the most recent period was assumed to remain constant.

Third, the Ministry's mortality estimates at the census division level were developed using a ratio methodology. The government applied the Ontario-level mortality structure to each census division's age structure over the most recent three years of comparable data and calculated the expected number of deaths. It then compared these estimates to the actual annual number of deaths in each census division over this period to create ratios of actual-to-expected numbers of deaths. These ratios were then multiplied by provincial age-specific death rates to create death rates for each census division. These were then applied to the corresponding census division population to derive the number of deaths for each census division.²

Population Projections

The Sudbury District's total population is expected to decrease by 18 percent from 2013 to 2041 (Table 1). The continuing aging of the population is also evident from the Ministry of Finance's projections (Figure 6 and Table 2), with the share of individuals under age 20 expected to decline from 19.8 percent in 2013 to 17.0 percent in 2041, the share of working-age people (ages 20 to 64) projected to decline from 60.8 percent in 2013 to 46.2 percent in 2041, and the share of seniors is expected to rise from 19.4 percent in 2013 to 36.8 percent in 2041.³ As the next part of the study will show, the dramatic decline in the working-age population has important implications for the future availability of a qualified labour force in the District.

Table 1: Population Projections by Age Group, Sudbury District, 2013-2041

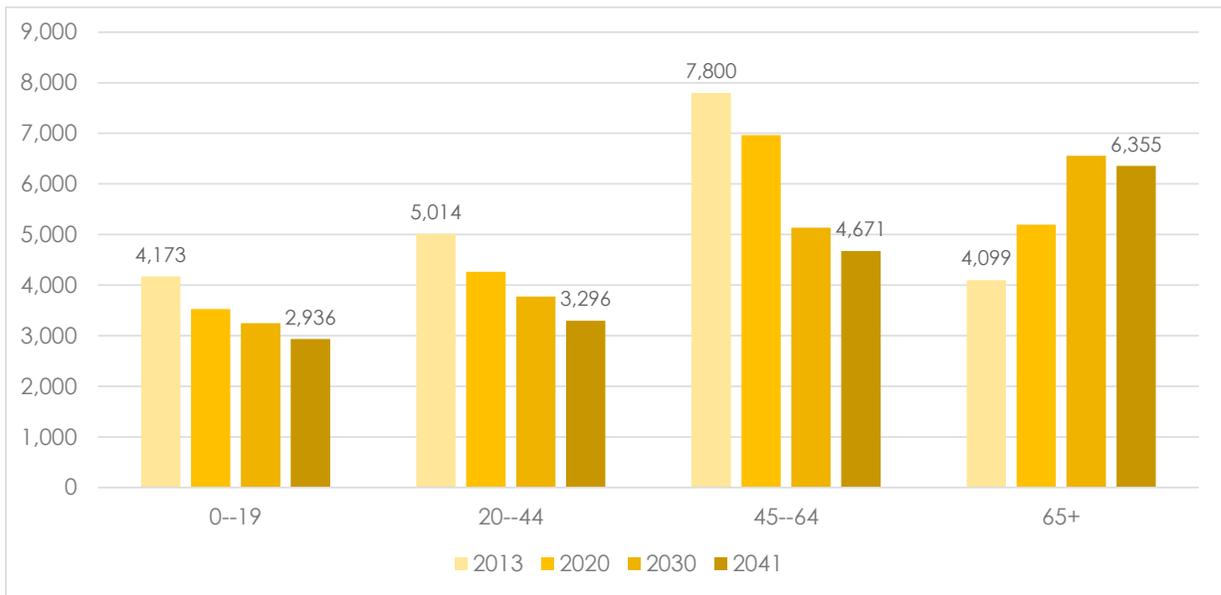
	0--19	20--44	45--64	65+	Total
2013	4,173	5,014	7,800	4,099	21,086
2020	3,527	4,267	6,963	5,193	19,950
2030	3,250	3,776	5,138	6,557	18,721
2041	2,936	3,296	4,671	6,355	17,258

Source: Ontario, Ministry of Finance, "Ontario Population Projections, 2013-2041" (Toronto, 2014).

² See Ontario, Ministry of Finance, "Ontario Population Projections, 2013-2041" (Toronto, 2014).

³ Focus is placed on individuals aged 20 to 64 as the core working-age population since there has been a declining trend in the labour force participation rate of Ontario's youth in recent years primarily due to a significant rise in enrolment rates in postsecondary education institutions.

Figure 6: Population Projections by Age Group, Sudbury District, 2013–41



Source: Author's calculations based on Ontario, Ministry of Finance, "Ontario Population Projections, 2013-2041" (Toronto, 2014).

Table 2: Population Projections by Age Distribution, Sudbury District, 2013–2041

	0 to 19	20 to 44	45 to 64	65+
2013	19.79	23.78	36.99	19.44
2020	17.68	21.39	34.90	26.03
2030	17.36	20.17	27.45	35.02
2041	17.01	19.10	27.07	36.82

Source: Ontario, Ministry of Finance, "Ontario Population Projections, 2013-2041" (Toronto, 2014).

Indigenous Population Projections

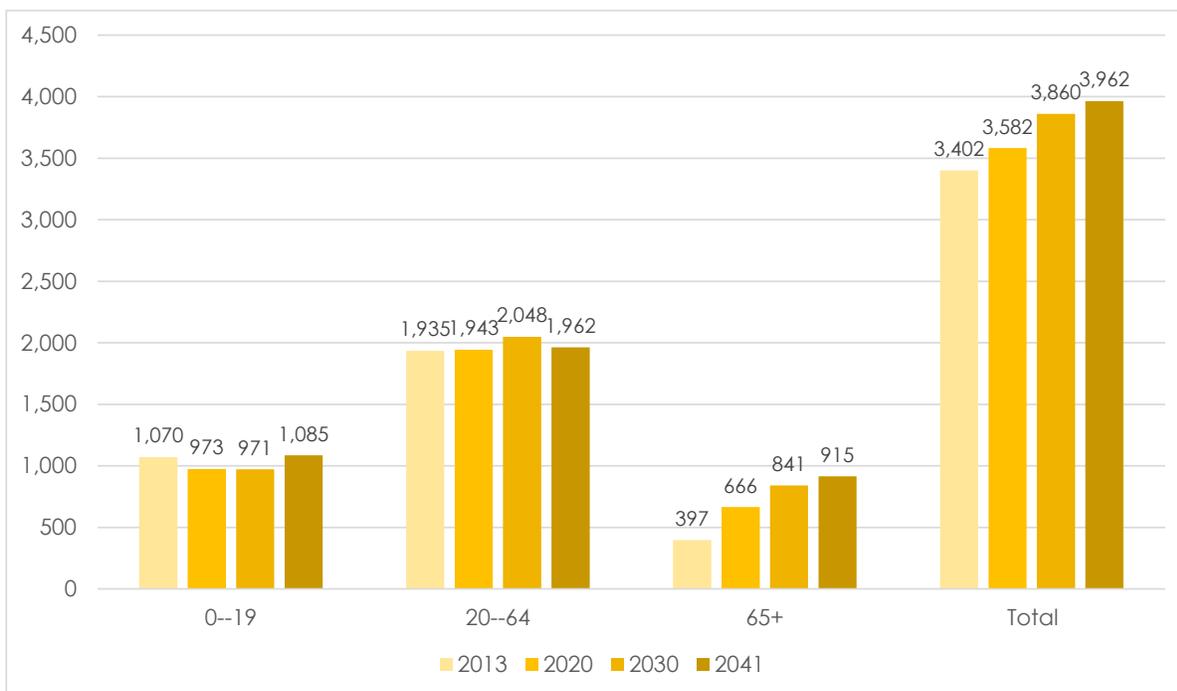
The Sudbury District is home to a diverse group of Indigenous communities including 6 reserves. The Indigenous communities are spread across the District, and while some neighbour other non-Indigenous communities, others are much more remote and often face challenges related to transportation and accessibility. This section of the report provides population projections for the District's Indigenous population.

In making projections for the Indigenous population in the District out to 2041, this study employs Northern Ontario's Demographic Forecasting Model, which is based on the Cohort Component method.⁴ The base year data for the projection are from Statistics Canada's National Household Survey for 2011. In projecting the future Indigenous population, this study does not adjust for the undercoverage of Indigenous people in the region — as mentioned above, there were 405 omitted persons in the Sudbury District alone — so the projections should be considered conservative. This study also assumes zero net migration of Indigenous people over the forecast period, since the existing evidence suggests there is relatively low mobility among the region's Indigenous population. The fertility rate for the Indigenous population is assumed equal to that in rural Northeastern Ontario, and the mortality rate to equal the rate for the general population of Canada based on the 2011 census.

Based on these assumptions, Figure 7 shows that the Indigenous population in this District is expected to increase from 3,402 in 2013 to 3,962 in 2041, a growth rate of about 16.5 percent. The number of individuals under age 20 and working-age individuals are expected to remain roughly constant during this period, while the number of individuals aged 65 and over are expected to rise from 397 in 2013 to 915 in 2041, an increase of 130 percent.

The Indigenous population's share of the total District population is expected to increase from 16.1 percent in 2013 to 23.0 percent in 2041 (Figure 8). The share of prime-working-age (those ages 20 to 44) is expected to increase from 19.5 percent in 2013 to 37.5 percent in 2041. Similarly, the share of working-age Indigenous people (those ages 20 to 64) is expected to increase from 15.1 percent in 2013 to 24.6 percent in 2041. The share of Indigenous seniors is expected to rise from 9.7 percent in 2013 to 14.4 percent in 2041.

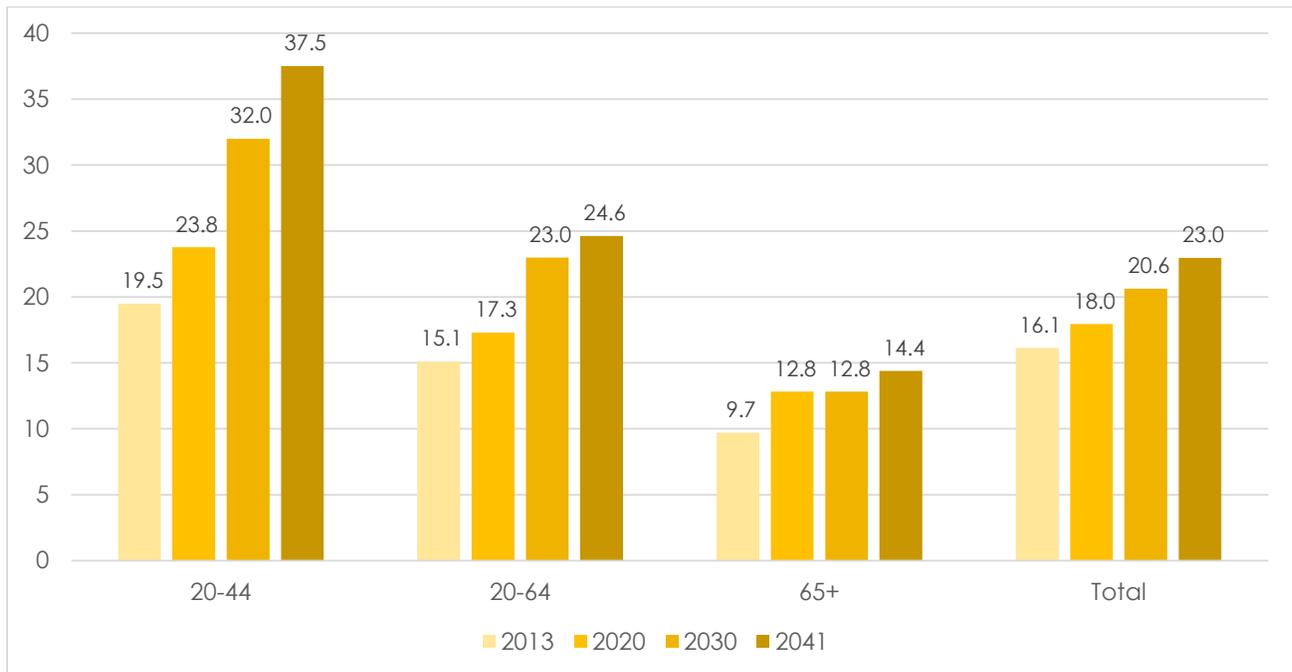
Figure 7: Indigenous Population Projections by Age Group, Sudbury District, 2013–2041



Source: Author's calculations based on Ontario, Ministry of Finance, "Ontario Population Projections, 2013-2041" (Toronto, 2014).

4 For a complete discussion of this model, see B. Moazzami, "It's What You Know (and Where You Can Go): Human Capital and Agglomeration Effects on Demographic Trends in Northern Ontario" (Thunder Bay, ON: Northern Policy Institute, 2015).

Figure 8: Projections of the Share of the Indigenous Population, Sudbury District, 2013–2041



Source: Author's calculations based on Ontario, Ministry of Finance, "Ontario Population Projections, 2013-2041" (Toronto, 2014).

Sudbury District's Labour Force: Past, Present and Future Trends

Demographic changes have a direct impact on the supply side of the economy through their influence on the labour force. Population aging and a declining share of working-age people can seriously restrain future economic development unless productivity growth accelerates or steps are taken to increase participation of older workers, youth and other underrepresented groups in the labour force.

This study has shown that the Indigenous population represents a growing segment of this District's total population and its working-age population. A significant gap exists, however, between the level of educational achievement of Indigenous individuals and that of the general population, resulting in a severe labour market outcome disparity that affects the current and future productive capacity of the District of Sudbury's labour force.

Labour Market Trends in Sudbury District

Table 3 shows various labour market indicators for Northeastern Ontario in 2001 and 2011. The total core working-age population (ages 15 to 64) in the region declined from 365,020 in 2001 to 364,100 in 2011. The Francophone and immigrant population both declined during this period while the Indigenous population grew. During the same period, the labour force participation rate among women rose by 3.8 percent resulting in an increased number of people in the labour force. The Ontario Ministry of Finance reports that, "[t]he most significant trend driving the aggregate labour force participation rate in Ontario has been the increase in the number of women in the workforce. Labour force participation rates for adult women have risen dramatically, from 57.0 percent in 1976 to 82.0 percent in 2013."¹⁵ Total employment among men declined while that among women increased from 2001 to 2011. The unemployment rate among men and women both declined slightly during this period.

The labour force participation rate of Indigenous men declined from 70.3 percent in 2001 to 66.6 percent in 2011. On the other hand, the participation rate among Indigenous women increased from 49.2 percent in 2001 to 55.1 percent in 2011. The unemployment rate among Indigenous men declined from 21.3 percent in 2001 to 16.4 percent in 2011, which can be attributed partly to some previously unemployed persons having stopped participating in the labour force. The unemployment rate among Indigenous women also declined from 16.5 percent in 2001 to 11.0 percent in 2011. The labour market outcome for Indigenous people who live on reserve is different from those who live off-reserve, where those living on-reserve have lower employment rates and much higher unemployment rates.

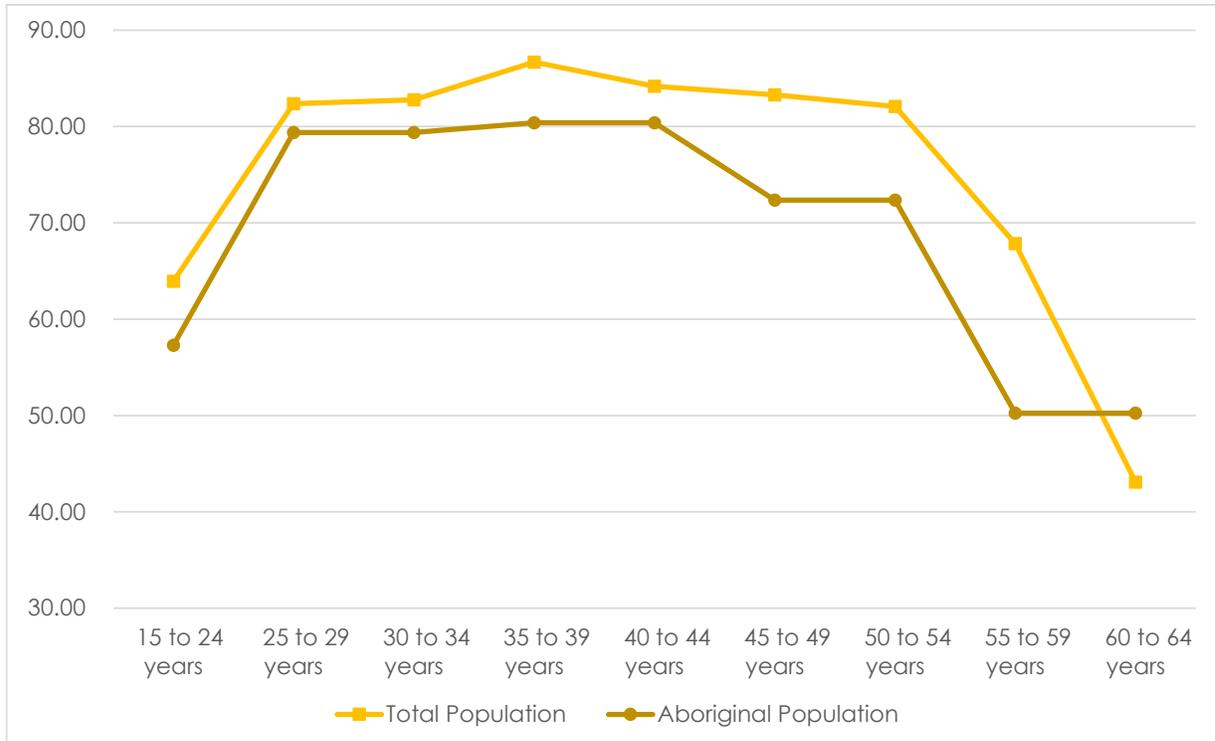
Table 3: Labour Market Trends, Ages 15-64 years, Northeastern Ontario, 2001 and 2011

Labour Market Outcome	Men		Women	
	2001	2011	2001	2011
Total Regional Population				
Total population 15 to 64 years of age	179,755	180,120	185,265	183,980
In the labour force	137,045	135,580	123,265	129,300
Employed	122,290	121,260	112,320	118,615
Unemployed	14,760	14,320	10,945	10,680
Not in the labour Force	42,705	44,540	61,995	54,680
Participation Rate	76.2	75.3	66.5	70.3
Employment Rate	68.0	67.3	60.6	64.5
Unemployment Rate	10.8	10.6	8.9	8.3
Francophones				
Total population 15 to 64 years of age	44,465	37,800	46,575	40,405
In the labour force	33,855	28,640	30,285	27,975
Employed	30,060	26,125	28,230	26,390
Unemployed	3,795	2,510	2,060	1,585
Not in the labour Force	10,605	9,155	16,285	12,430
Participation Rate	76.1	75.8	65.0	69.2
Employment Rate	67.6	69.1	60.6	65.3
Unemployment Rate	11.2	8.8	6.8	5.7
Immigrants				
Total population 15 to 64 years of age	9,555	7,345	10,650	8,660
In the labour force	7,165	5,415	6,440	5,480
Employed	6,670	5,055	6,070	5,080
Unemployed	495	355	370	400
Not in the labour Force	2,390	1,930	4,205	3,175
Participation Rate	75.0	73.7	60.5	63.3
Employment Rate	69.8	68.8	57.0	58.7
Unemployment Rate	7.0	6.6	5.8	7.3
Indigenous People				
Total population 15 to 64 years of age	13,015	19,135	13,855	20,635
In the labour force	9,145	12,740	8,155	12,765
Employed	7,195	10,655	6,810	11,360
Unemployed	1,950	2,085	1,345	1,410
Not in the labour Force	3,870	6,400	5,700	7,870
Participation Rate	70.3	66.6	58.9	61.9
Employment Rate	55.2	55.7	49.2	55.1
Unemployment Rate	21.3	16.4	16.5	11.0

Source: Statistics Canada, 2001 Census and 2011 NHS, custom tabulation.

According to the available data, Indigenous peoples tend to participate less in the formal labour force as compared to the non-Indigenous population. It is important to note that these findings do not necessarily take into account alternative and traditional economies that Indigenous populations historically and presently participate in. As Figure 9 shows, their labour force participation rate was below the regional average in 2011. Their unemployment rate was also significantly higher than the regional average. In fact, their lower labour force participation rate is partly attributable to the high unemployment rate among the Indigenous workforce and partly related to the fact that their level of educational attainment is below the regional average.

Figure 9: Labour Force Participation Rates (%), Total and Indigenous Population, by Age Group, Northeastern Ontario, 2011



Sources: Statistics Canada, Census of Canada 2011, and National Household Survey 2011, custom tabulation.

Figure 10 compares labour force characteristics among various demographics of the population in the Sudbury District and Northeastern Ontario.⁶ The labour force participation rate among men is 71.2 percent compared to 75.3 percent in Northeastern Ontario and 76.0 percent in Ontario in 2011. Notably, Indigenous men living on-reserve have relatively high levels of participation compared to the Northeast and compared to those living off-reserve in the Sudbury District. The participation rate among women was 67.6 percent compared to 70.3 in Northeastern Ontario and 72.6 in Ontario. The participation rate among immigrant women in the District was the lowest of all sub-groups in the District.

The unemployment rate among men in the Sudbury District was 10.4 percent compared to 10.6 and 8.4 in Northeastern Ontario and Ontario, respectively. The unemployment rate among women was 8.8 percent compared to 8.3 percent in both Northeastern Ontario and the province as a whole. The unemployment rate among on-reserve Indigenous men was the highest at 21.4 percent.

The employment rate which represents the share of the working-age population who were employed was 63.8 percent for men in the Sudbury District compared to 67.3 percent in Northeastern Ontario in 2011. Again, employment rates were generally lower for the Indigenous population. The employment rate among working-age women is 65.4 percent in the Sudbury District compared to 64.5 percent in the Northeast.

⁶ Note that the indicators for population groups with fewer than 500 individuals are not very reliable.

Figure 10: Labour Force Participation, Employment and Unemployment Rates (%), Ages 15 to 64 years, Sudbury District and Northeast Ontario, 2011



Note: Missing bars indicate that data was not available.

Sources: Statistics Canada, Census of Canada 2011, and National Household Survey 2011, custom tabulation.

Size and Composition of the Future Labour Force

To forecast the future labour force in the District of Sudbury and Northeastern Ontario, this study uses detailed population projections along with information regarding labour force participation rates for men and women in different age groups. It is assumed that participation rates during the projection period (out to 2041) stay constant at their 2011 level. Different assumptions regarding participation rates would alter the labour force estimates, but only to a limited extent. The main determinants of the future labour force are the size and age distribution of the population in each jurisdiction.

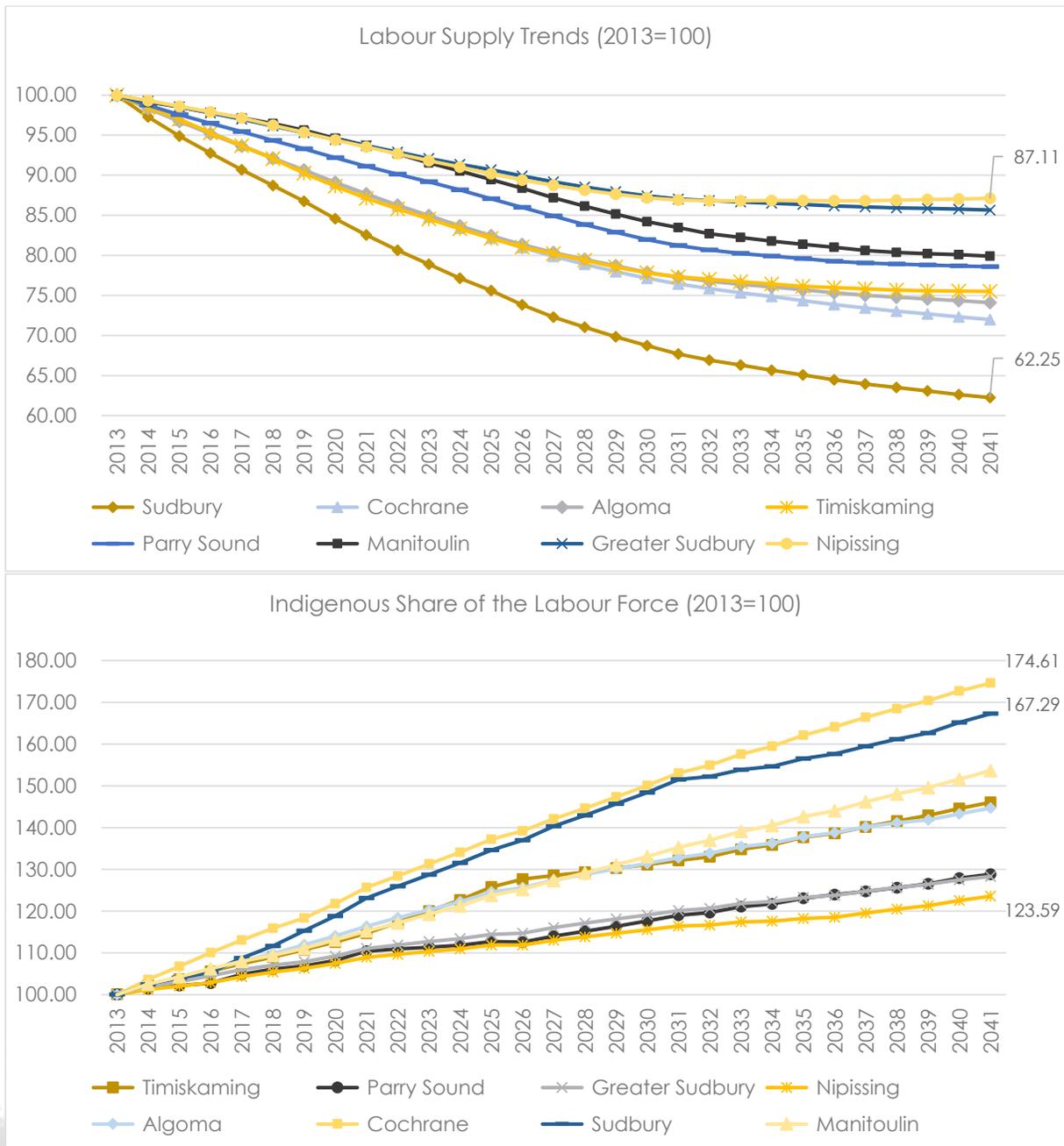
Table 4 and Figure 11 provide labour supply projections for the Sudbury District and Northeast Ontario for the period from 2013 to 2041. The District's labour force is expected to decline by about 37.75 percent over the period, however, the Indigenous labour force is expected to increase from 14.6 percent in 2013 to 24.4 percent in 2041.

Table 4: Projected Labour Supply, Total and Indigenous, Sudbury District and Northeastern Ontario, 2013–2041

Year	Sudbury District			Northeast Ontario		
	Total Labour Force	Indigenous Labour Force	Indigenous Share (%)	Total Labour Force	Indigenous Labour Force	Indigenous Share (%)
2013	9,784	1,426	14.57	264,860	27,372	10.33
2014	9,518	1,421	14.93	261,674	27,632	10.56
2015	9,283	1,408	15.16	258,626	27,751	10.73
2016	9,076	1,393	15.35	255,558	27,874	10.91
2017	8,873	1,406	15.85	252,470	28,059	11.11
2018	8,680	1,412	16.27	249,289	28,142	11.29
2019	8,487	1,426	16.8	246,155	28,200	11.46
2020	8,276	1,433	17.31	242,891	28,327	11.66
2021	8,078	1,449	17.94	239,896	28,554	11.9
2022	7,889	1,448	18.36	236,948	28,590	12.07
2023	7,720	1,448	18.75	234,070	28,611	12.22
2024	7,548	1,447	19.16	231,333	28,627	12.37
2025	7,399	1,451	19.61	228,687	28,737	12.57
2026	7,223	1,441	19.95	226,057	28,594	12.65
2027	7,073	1,446	20.44	223,711	28,695	12.83
2028	6,950	1,448	20.83	221,550	28,741	12.97
2029	6,834	1,451	21.23	219,616	28,813	13.12
2030	6,726	1,454	21.63	217,788	28,885	13.26
2031	6,623	1,462	22.08	216,402	29,033	13.42
2032	6,547	1,452	22.18	215,433	29,087	13.5
2033	6,487	1,454	22.42	214,669	29,304	13.65
2034	6,425	1,448	22.53	213,998	29,374	13.73
2035	6,366	1,452	22.81	213,288	29,586	13.87
2036	6,307	1,449	22.97	212,569	29,671	13.96
2037	6,257	1,454	23.24	211,992	29,880	14.09
2038	6,216	1,460	23.49	211,538	30,067	14.21
2039	6,171	1,462	23.7	211,198	30,240	14.32
2040	6,128	1,475	24.07	210,792	30,497	14.47
2041	6,091	1,485	24.37	210,397	30,706	14.59

Source: Author's estimates based on Ontario, Ministry of Finance, "Ontario Population Projections, 2013-2041" (Toronto, 2014).

Figure 11: Future Supply of Labour, Total and Indigenous Share, Northeastern Ontario Districts, 2013–2041



Source: Author's estimates based on Ontario, Ministry of Finance, "Ontario Population Projections, 2013-2041" (Toronto, 2014).

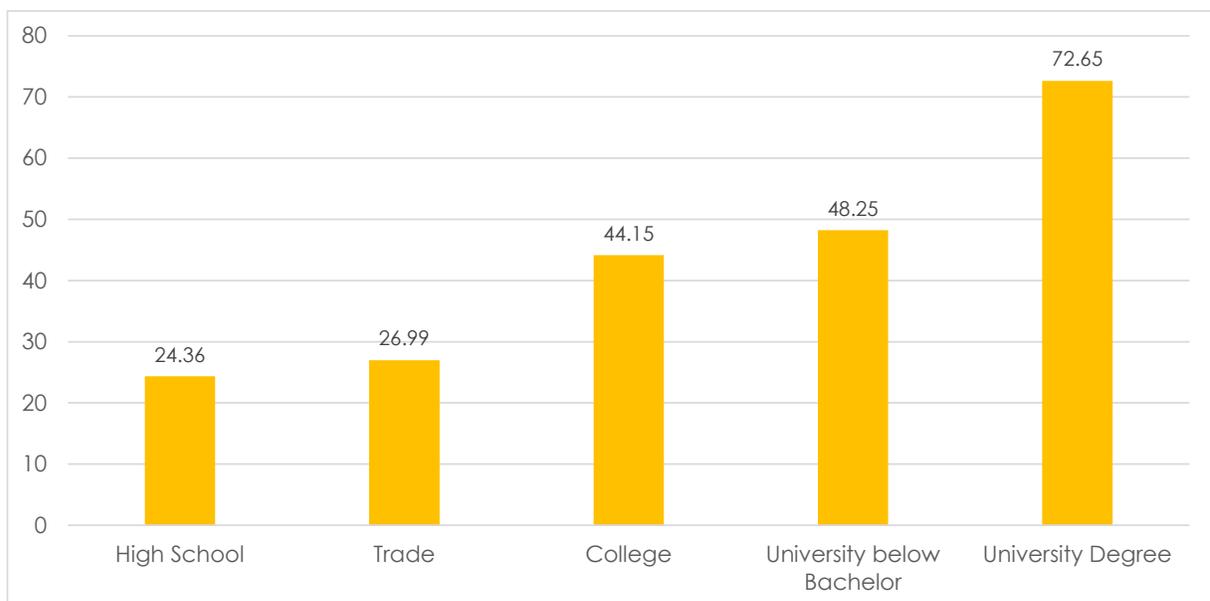
Productivity and the Human Capital Composition of the Workforce in Sudbury District and Northeastern Ontario

Productivity growth is directly linked to the human capital composition of the workforce. Human capital is defined as the stock of knowledge, skills and abilities embodied in individuals that directly affects their level of productivity. Since knowledge and skills are acquired through education and experience, investing in human capital represents an avenue through which the Sudbury District can enhance productivity and minimize the impact of its declining labour force.

To estimate the human capital composition of the regional workforce, one needs to specify and measure a proxy for human capital that also reflects and incorporates a measure of productivity of the workforce in the Sudbury District and Northeastern Ontario. To obtain such an index, this study first estimated a standard earnings model using the 2006 census micro-data file.⁷ This study used data pertaining to all working Canadians between the ages of 15 and 64 who were not attending school and whose employment earnings were greater than \$1,000 and less than \$1 million. The benchmark or reference group is those with less than a high school diploma.

The estimated return-to-schooling coefficients (Figure 12) show the increased earnings, compared to the reference group, of obtaining different levels of education. Therefore, they represent the average rate of return to schooling at the national level. For example, obtaining a high school diploma increases a person's earnings by 24.4 percent above the earnings of those without a high school diploma. Similarly, obtaining a trade or college diploma increases earnings by 27.0 and 44.1 percent respectively. A university degree increases earnings by 72.6 percent. The return to schooling estimates reflect higher productivity resulting from an increased level of education. In short, the return to education increases as the level of schooling rises, reflecting higher earnings commensurate with higher productivity as the level of education increases.

Figure 12: The Return to Education (%), by Level of Educational Attainment, Canada, 2006



Note: Persons with an education who do not have a job are not included.

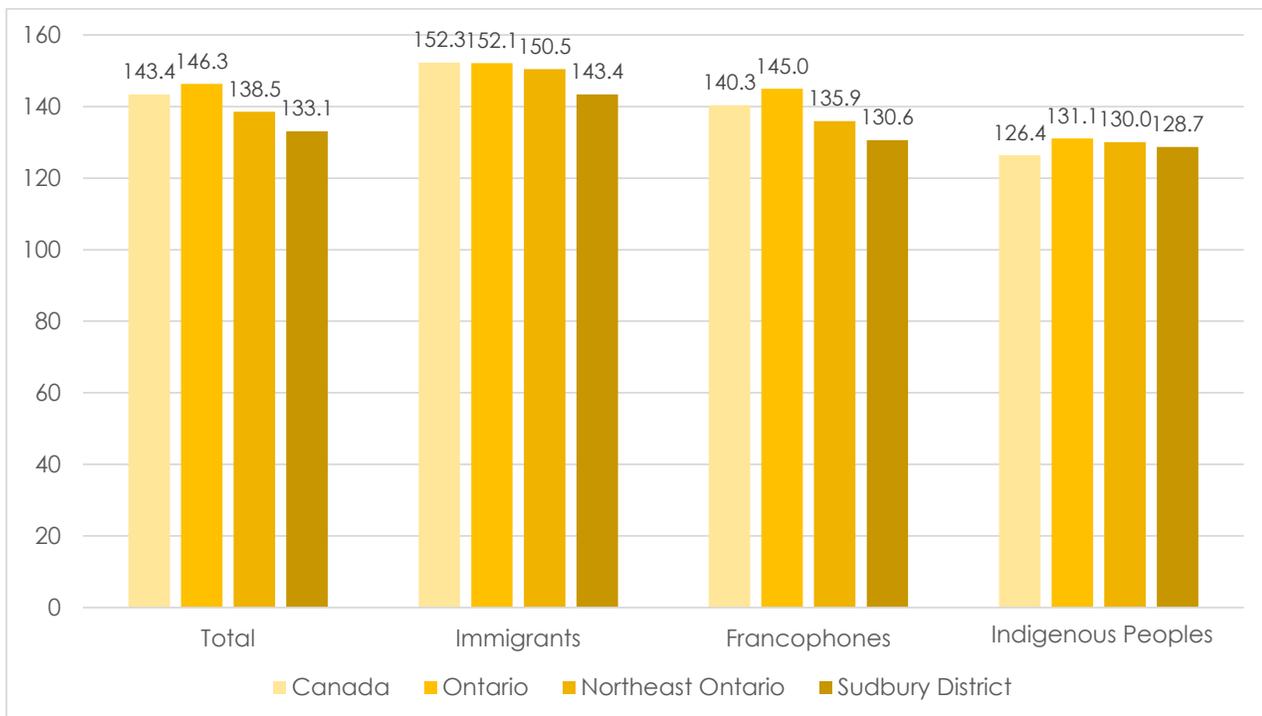
Source: Author's estimates based on Statistics Canada's 2006 Census Microdata file.

7 The earnings model is of the form: $\ln Wage = \alpha + \sum \beta_i S_i + \sum \delta_j X_j + \epsilon$, where S_i are the highest level of schooling, X_j are other control variables which include age categories, marital status, etc. and ϵ is an error term.

This study then used the estimated return-to-schooling coefficients as weights to calculate a weighted average index of the share of individuals aged 15 to 64 with different levels of schooling for each of the Districts in Northeastern Ontario.⁸ Figure 13 shows estimated human capital indices for working-age Indigenous, immigrants, Francophones and the total population in Canada, Ontario, Northeastern Ontario and the Sudbury District.⁹ The estimated indexes range from 100 if none of the area's residents have completed high school to about 200 if all residents have obtained a university degree.

As Figure 13 shows, the human capital composition of the working-age population in the District is well-below that in Northeastern Ontario, and below provincial and national levels. In addition, the human capital indexes for immigrants and Francophones in the District are lower than in Northeastern Ontario, Ontario and Canada. On the other hand, the indexes for the Indigenous labour force in the District, while below the rest of the population, are higher than national levels, but below regional and provincial levels.

Figure 13: Human Capital Index for the Working-Age Population, Canada, Ontario, Northeastern Ontario and Sudbury District, 2011



Source: Author's estimates based on Statistics Canada's 2006 Census Microdata file.

8 $HCI = \exp\{\sum \beta_i \cdot S_i \text{ shares}\}$, where HCI stands for Human Capital Index, exp stands for exponential, and S_i shares are the share of the population ages 15 to 64 with S_i level of education in a given census subdivision. The formulation of the human capital measure is based on R.E. Hall and C.I. Jones (1999), "Why Do Some Countries Produce So Much More Output per Worker than Others?" *Quarterly Journal of Economics* 114 (1, 1999): 83–116. See also Francesco Caselli, "Accounting for Cross-Country Income Differences", First Draft, November 2003.

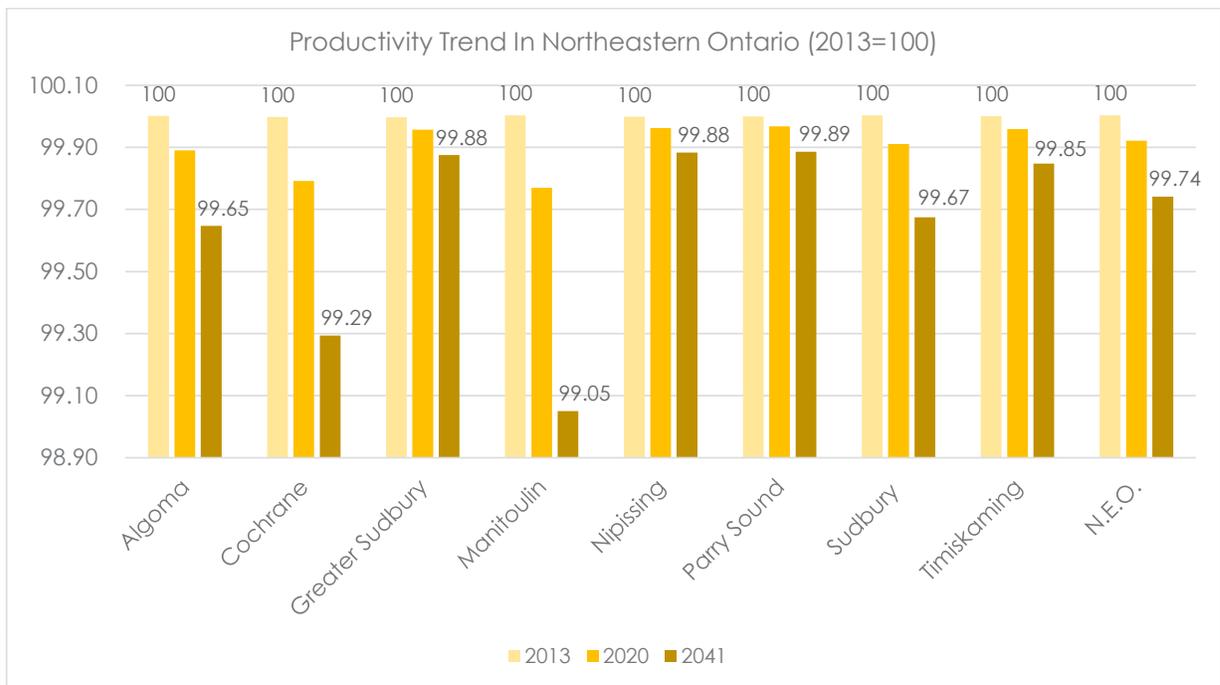
9 $HCI = \exp\{\sum \beta_i \cdot S_i \text{ shares}\}$, where HCI stands for Human Capital Index, exp stands for exponential, and S_i shares are the share of the population ages 15 to 64 with S_i level of education in a given census subdivision. The formulation of the human capital measure is based on R.E. Hall and C.I. Jones (1999), "Why Do Some Countries Produce So Much More Output per Worker than Others?" *Quarterly Journal of Economics* 114 (1, 1999): 83–116. See also Francesco Caselli, "Accounting for Cross-Country Income Differences", First Draft, November 2003.

A Perfect Storm: Declining Labour Supply and Labour Productivity in Sudbury District

Earlier, this study identified two important demographic trends in this District. First, the working-age population is declining; as a result, the supply of labour is expected to decline over the coming years. Second, a growing Indigenous labour force potentially could offset that trend, but the human capital composition of the Indigenous workforce is lower than the rest of the population, so if the current situation continues, future labour productivity will decline.

To estimate the human capital composition of the future regional workforce, this study combined the labour force projections with the human capital indexes for various segments of the workforce. As Figure 14 shows, if the current level of educational achievement continues, the human capital composition of the workforce will decline in the coming years in both the Sudbury District and across Northeastern Ontario, however, it is expected to decline at a faster rate than the region. This index is positively correlated with labour productivity, labour income and output in the region.

Figure 14. Human Capital Composition of the Workforce in Northeastern Ontario Districts, 2013–2041



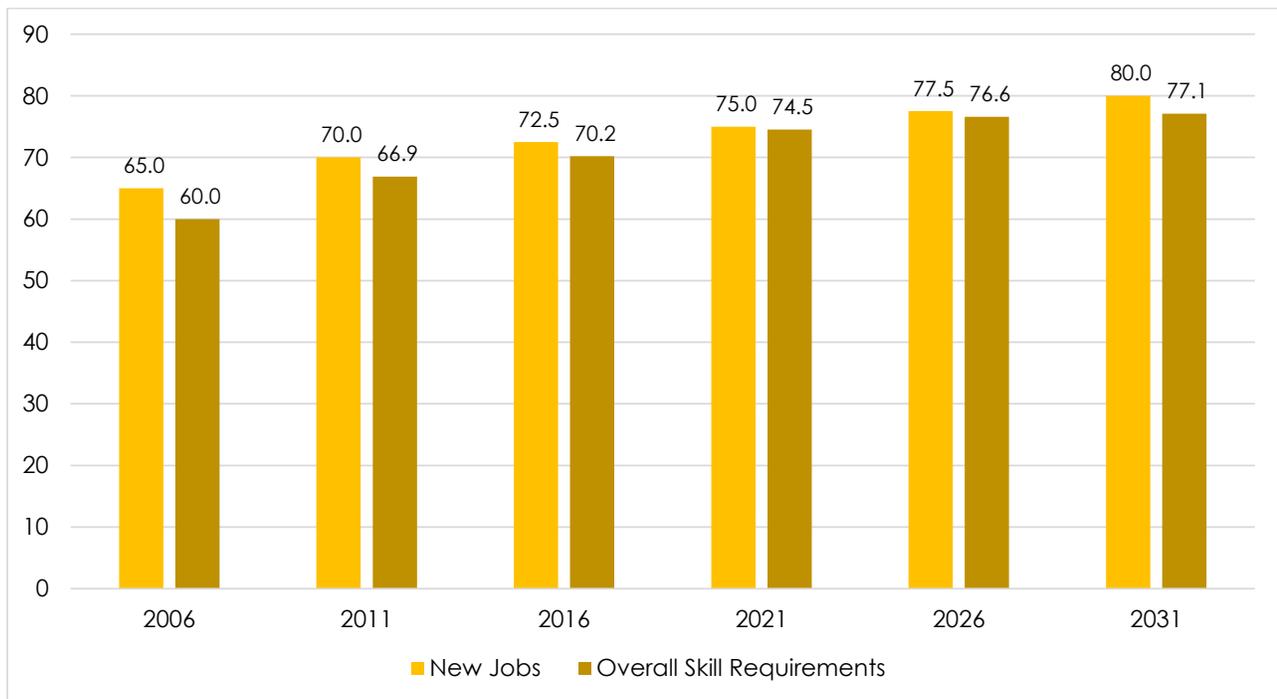
Source: Author's estimates based on Ontario, Ministry of Finance, "Ontario Population Projections, 2013-2041" (Toronto, 2014).



The declining supply of labour and declining labour productivity in the District of Sudbury is only half of the story. Technological changes and the emergence of the knowledge economy have altered the requirements of the labour market. Various studies suggest that, by 2031, about 80 percent of the workforce needs to have post-secondary credentials such as an apprenticeship, college or university degree. Currently, 70 percent of the new jobs and an average of 63.4 percent of all jobs require some post-secondary credential.¹⁰ Based on various studies by the Ontario Ministry of Education, Human Resources and Skills Development Canada, the British Columbia Ministry of Skills, Training and Education,

the British Columbia Ministry of Advanced Education and Labour Market Development and other government agencies, Miner Management Consultants provides estimates of the percentage of new jobs that will require post-secondary education in the coming years (Figure 15). Yet, as Figure 16 shows, the skill levels of the prime-working-age population in the Sudbury District are lower than the skill levels in Ontario and Canada for the total population, while the Indigenous population has education levels below Ontario and above Canada. Importantly, however, the present skill level in the District overall is well-below the current estimated skill requirements of about 63.4 percent.

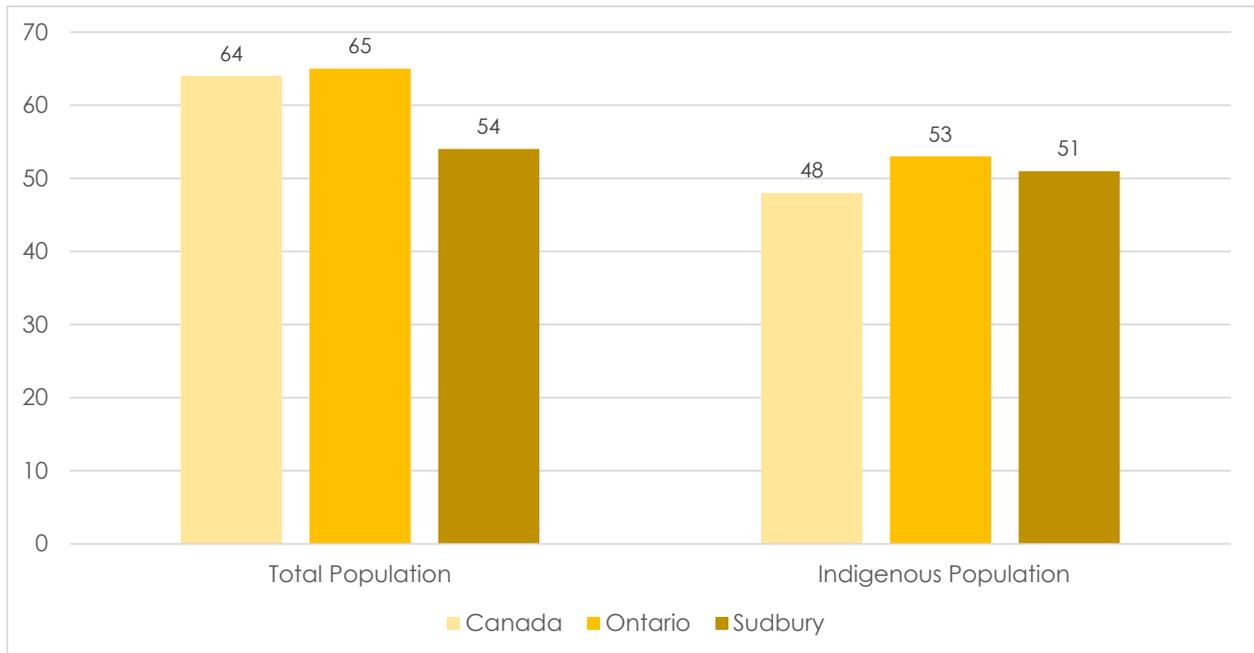
Figure 15. Percentage of Jobs Requiring Post-Secondary Education, Canada, 2006–2031



Source: Rick Miner, "People without Jobs, Jobs without People: Canada's Future Labour Market" (Toronto: Miner Management Consultants, 2010).

10 Miner Management Consultants, 'Ontario's Labour Market Future- People without Jobs, Jobs without People', February 2010.

Figure 16: Percentage of the Labour Force Ages 25–64 with Postsecondary Credentials, Sudbury District, Ontario and Canada, 2011



Source: Author's estimates based on Statistics Canada, Census of Canada 2011, and National Household Survey 2011, custom tabulation.

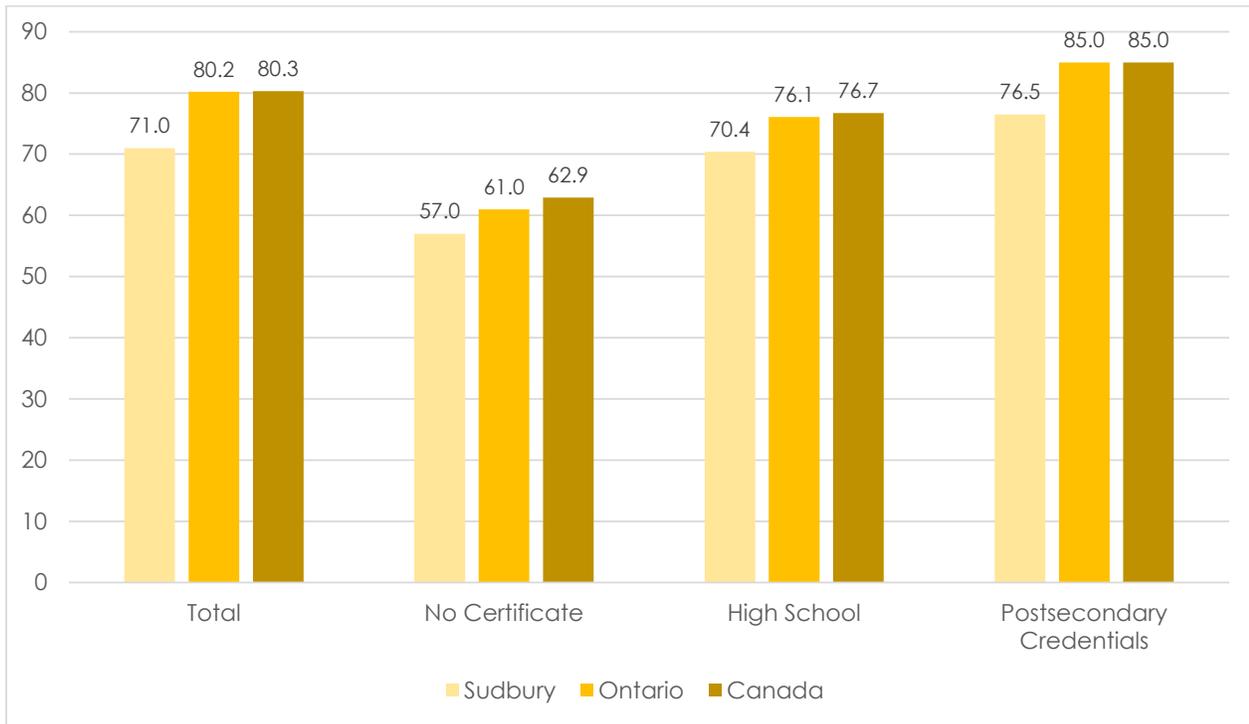
Since the Indigenous labour force will account for a significant and growing share of the Sudbury District's future workforce, it is vital for the social and economic viability of the region to adopt education policies that enable this segment of the labour force to meet the requirements of the future labour market.

Does the level of skills affect labour market performance – that is, the likelihood of employment, labour force participation and unemployment rates? Figure 17 shows that a higher skill level increases the likelihood of participation in the workforce. In the Sudbury District in 2011, the participation rate of the prime working age population (25-64) without a high school diploma was 57.0 percent compared to 70.4 percent for those with a high school diploma and 76.5 percent for those with postsecondary credentials. Figure 17 also shows that total labour force participation rates in the District of Sudbury lag behind the provincial and national averages.

Similarly, as shown in Figure 18, the average unemployment rate among those without a high school diploma in the District was 13.1 percent compared to 10.4 percent for those with a high school diploma and 4.8 percent for those with a postsecondary credentials. Overall, the total unemployment rate in 2011 in the District of 7.6 percent was higher than in Ontario and Canada.

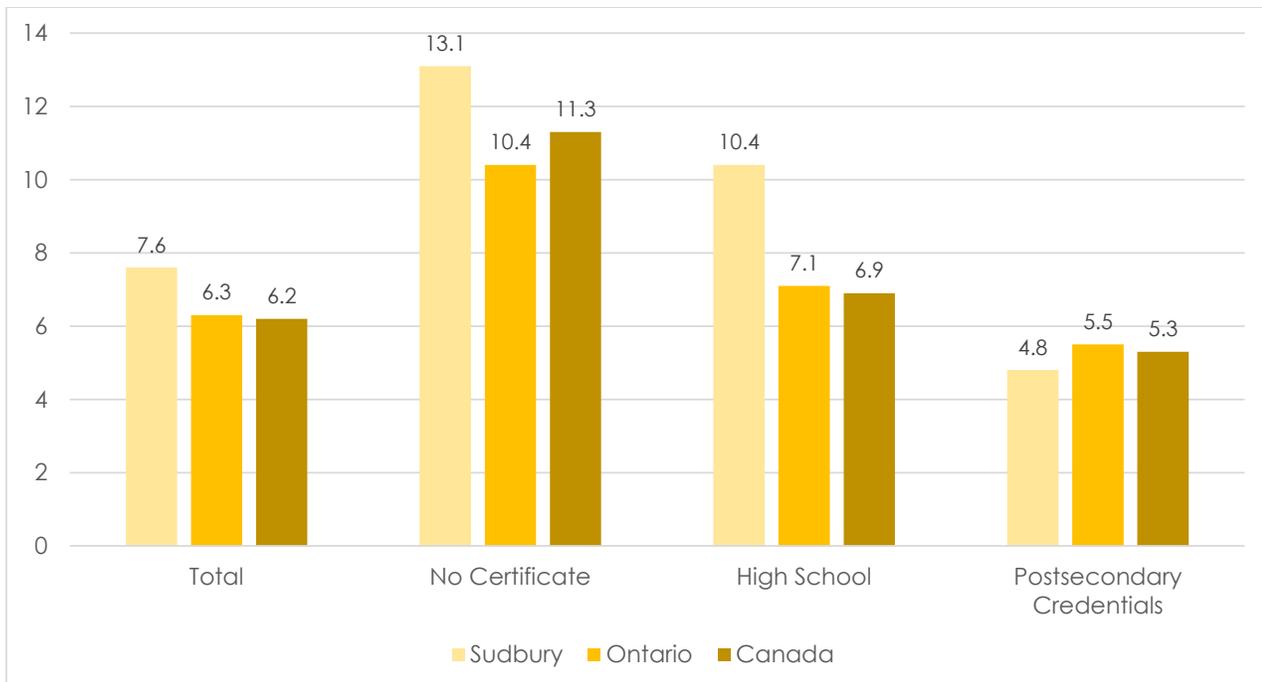
The employment rate – defined as the percentage of the prime working age population who are employed – was 49.5 percent for those without a high school diploma, which increases to 63.1 percent for those with a high school diploma and 72.8 percent for those with a postsecondary credential (Figure 19). Again, the employment rates in the Sudbury District lag behind provincial and national averages.

Figure 17: Labour Force Participation Rate by Level of Educational Attainment (%), Canada, Ontario and Sudbury District, 2011



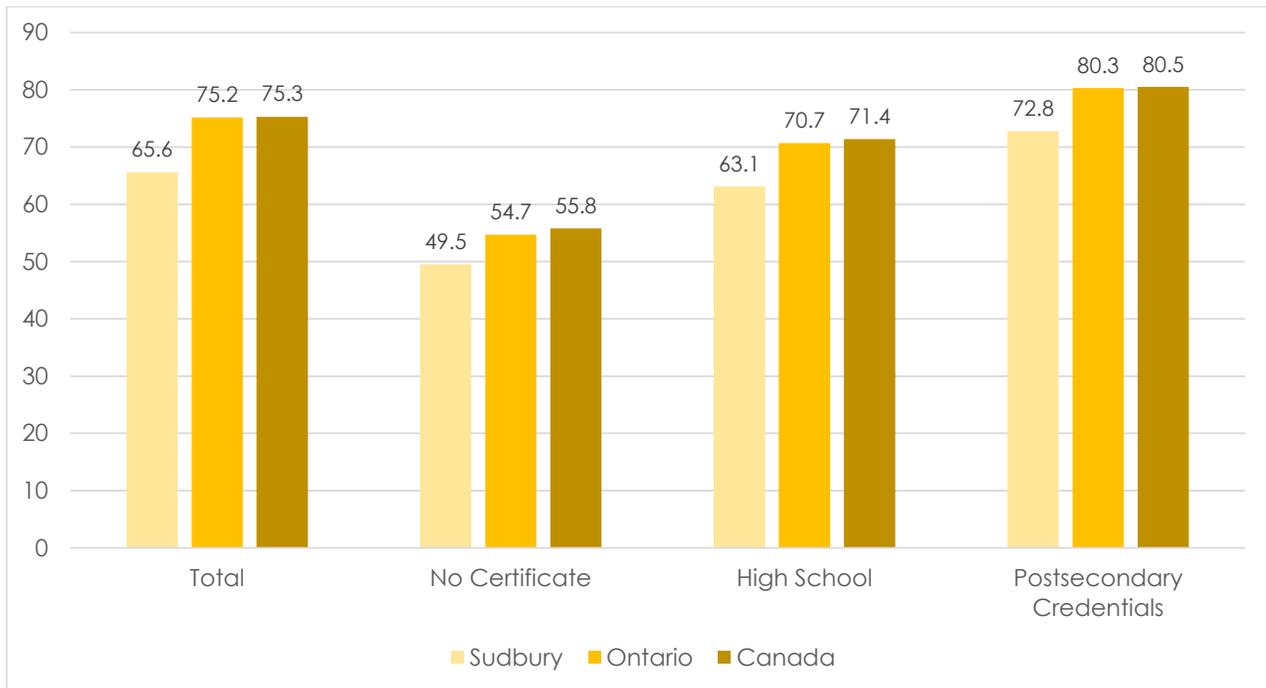
Source: Author's calculations based on Statistics Canada, Census of Canada 2011, and National Household Survey 2011, custom tabulation.

Figure 18: Likelihood of Unemployment by Highest Level of Schooling (%), Canada, Ontario and Sudbury District, 2011



Source: Author's calculations based on Statistics Canada, Census of Canada 2011, and National Household Survey 2011, custom tabulation.

Figure 19: Labour Force Employment Rate by Level of Educational Attainment (%), Canada, Ontario and Sudbury District, 2011



Source: Author's calculations based on Statistics Canada, Census of Canada 2011, and National Household Survey 2011, custom tabulation.

In short, individuals who do not have post-secondary credentials have a higher likelihood of non-participation in labour force and face a greater probability of unemployment, and these probabilities will only increase in the coming years. To the extent that the skill level of the workforce in the Sudbury District is below the estimated requirement needed for emerging occupations, the District will face a situation of workers with qualifications that do not match the existing jobs and of jobs that cannot find qualified workers — Miner's "People without Jobs, Jobs without People." Even if markets adjust to bring labour demand and supply into balance, the social impact of having many unemployable people in the region will be enormous.

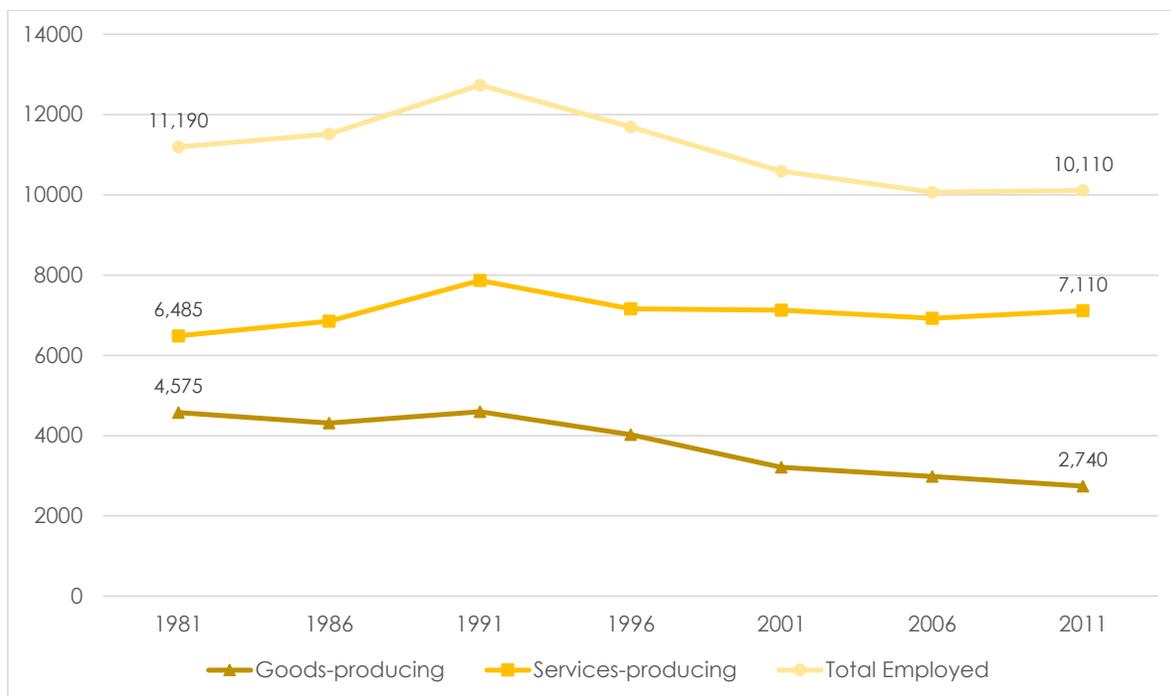
The evidence above suggests that one potential solution to the District's declining workforce size and productivity is to promote higher education through increased access to services, especially for the Indigenous population who experience lower levels of educational achievement.

One of the benefits of investing in education is a lower likelihood of unemployment and dependency on government transfer payments. In addition, regardless of what happens with agreements such as the Trans-Pacific Partnership, labour will continue to be more mobile among various countries, increasing the importance of achieving higher levels of education. In this case, workers in Northern Ontario will not only be competing with other workers in Ontario and Canada, but will be facing competition from other countries as well. To the extent that the skill level of the workforce in the Sudbury District is below the estimated skill requirement needed for the emerging occupations, the District will face workers whose qualifications do not match the existing jobs and jobs that cannot find qualified workers.

The Consequences of Shifting the Composition of the Employed Labour Force in Sudbury District

The structure of the District's workforce has been changing due to a population that is simultaneously declining and aging. At the same time, the industrial and occupational composition of the employed workforce is shifting due to changing market conditions. As a result, the size and industrial makeup of the employed workforce has changed over the past three decades. There has been a continuous shift away from the goods-producing sector dominated by private businesses to the service-producing sector, a large portion of which is publicly funded. Using data from various censuses of Canada as well as the 2011 NHS, Figure 20 and Table 5 show the changing industrial composition of the employed workforce in the District of Sudbury.

Figure 20: Employment in the Goods- and Services-Producing Industries, Sudbury District, 1986–2011



Source: Author's calculations based on Statistics Canada, Census of Canada (various years), and National Household Survey 2011, custom tabulation.

The shift away from the goods-producing sector has resulted in a net employment loss of over 1,800 jobs since the early-1980s. From 2001 to 2011, total employment in manufacturing declined by 35 percent, while utilities declined by 59 percent. On the other hand, agriculture, forestry, fishing and hunting sector increased by 14 percent during this period, and employment in the mining and oil and gas sector increased by 37 percent. It is imperative to acknowledge that the goods-producing sector is a major component of Northeastern Ontario's economic base and its change in employment can have serious impacts on the region's long-term economic growth potential. The multiplying effect between employment in goods-producing industries and total regional employment equals 1.87, meaning that one job in the goods-producing sector supports 1.87 jobs in the regional economy.¹¹

Employment in the services-producing sector has grown by roughly 10 percent since the early-1980s. Since 2001, service-producing industries that experienced notable growth included information and cultural industries (82 percent), real estate and rental and leasing (80 percent), and professional, scientific and technical services (68 percent). Public administration and health care services also reported relatively strong growth during this period. On the other hand, industries that experienced a decline during this period included accommodation and food services, transportation and warehousing, and other services.

11 Author's calculations based on data from Statistics Canada.

While growth in health care and public administration, which are referred to as quasi-base sectors since they are financed from outside the region, has helped to mitigate the decline in the traditional base sectors of the economy (i.e., manufacturing and primary industries), the District has also experienced positive private sector growth from several other industries. Fostering continued growth in these industries will be instrumental for the District moving forward.

Table 5: Industrial Composition of the Employed Workforce Ages 15 and Older, Sudbury District, 2001–2011

	2001	2006	2011	Employment change from 2001 to 2011	
	(number)			(number)	(percent)
Total	10,585	10,065	10,110	-475	-4.49
Industry - not applicable	245	160	245	0	0.00
All industries	10,335	9,905	9,865	-470	-4.55
Goods-producing sector	3,210	2,980	2,740	-470	-14.64
Agriculture, forestry, fishing and hunting	510	460	580	70	13.73
Mining, quarrying, and oil and gas extraction	310	325	425	115	37.10
Utilities	85	50	35	-50	-58.82
Construction	695	720	660	-35	-5.04
Manufacturing	1,610	1,425	1,040	-570	-35.40
Services-producing sector	7,125	6,920	7,110	-15	-0.21
Wholesale trade	200	260	200	0	0.00
Retail trade	1,230	1,425	1,290	60	4.88
Transportation and warehousing	1,040	770	720	-320	-30.77
Information and cultural industries	55	60	100	45	81.82
Finance and insurance	220	200	225	5	2.27
Real estate and rental and leasing	75	45	135	60	80.00
Professional, scientific and technical services	170	225	285	115	67.65
Management of companies and enterprises	0	0	0	0	0.00
Administrative and support, waste management and remediation services	275	295	355	80	29.09
Educational services	690	540	695	5	0.72
Health care and social assistance	765	1,050	905	140	18.30
Arts, entertainment and recreation	135	115	140	5	3.70
Accommodation and food services	1,090	840	720	-370	-33.94
Other services (except public administration)	490	375	365	-125	-25.51
Public administration	690	720	975	285	41.30

Source: Author's calculations based on Statistics Canada, Census of Canada (various years), and National Household Survey 2011, custom tabulation.

The changing industrial composition of the workforce has also been accompanied by a shift in the occupational structure of the employed workforce (Table 6). Since 2001, some occupations experienced notable growth, including occupations in art, culture, recreation and sport (75 percent), occupations in education, law and social, community and government services (60 percent), health occupations (33 percent), and management occupations (19 percent). On the other hand, occupations that experienced decline included occupations in manufacturing and utilities (28 percent), trades, transport and equipment operators (19 percent), and business, finance and administration occupations (19 percent).

Table 6: Employed Workforce by Occupation, Sudbury District, 1996–2011

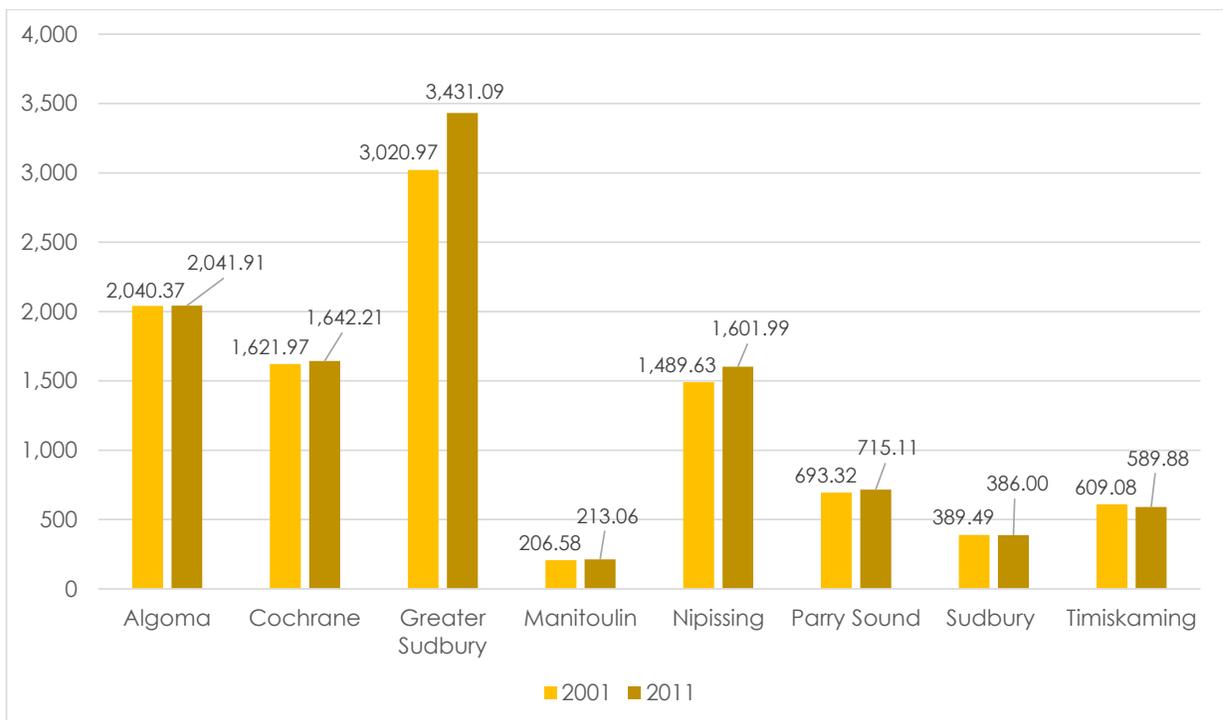
	1996	2001	2006	2011	Employment change from 2001 to 2011	
	(number)				(number)	(percent)
Total	11,685	10,585	10,065	10,110	-475	-4.49
Occupation - not applicable	515	250	160	245	-5	-2.00
All occupations	11,175	10,335	9,900	9,865	-470	-4.55
Management occupations	770	930	905	1,105	175	18.82
Business, finance and administration occupations	1,400	1,295	1,320	1,055	-240	-18.53
Natural and applied sciences and related occupations	370	295	260	295	0	0.00
Health occupations	390	345	600	460	115	33.33
Occupations in education, law and social, community and government services	690	675	570	1,080	405	60.00
Occupations in art, culture, recreation and sport	145	100	100	175	75	75.00
Sales and service occupations	3,175	2,650	2,480	2,470	-180	-6.79
Trades, transport and equipment operators and related occupations	2,305	2,705	2,355	2,185	-520	-19.22
Natural resources, agriculture and related production occupations	975	565	675	485	-80	-14.16
Occupations in manufacturing and utilities	945	770	625	555	-215	-27.92

Source: Statistics Canada, Census of Canada (various years), and National Household Survey 2011, custom tabulation.

Labour Income and Gross Domestic Product in Sudbury District

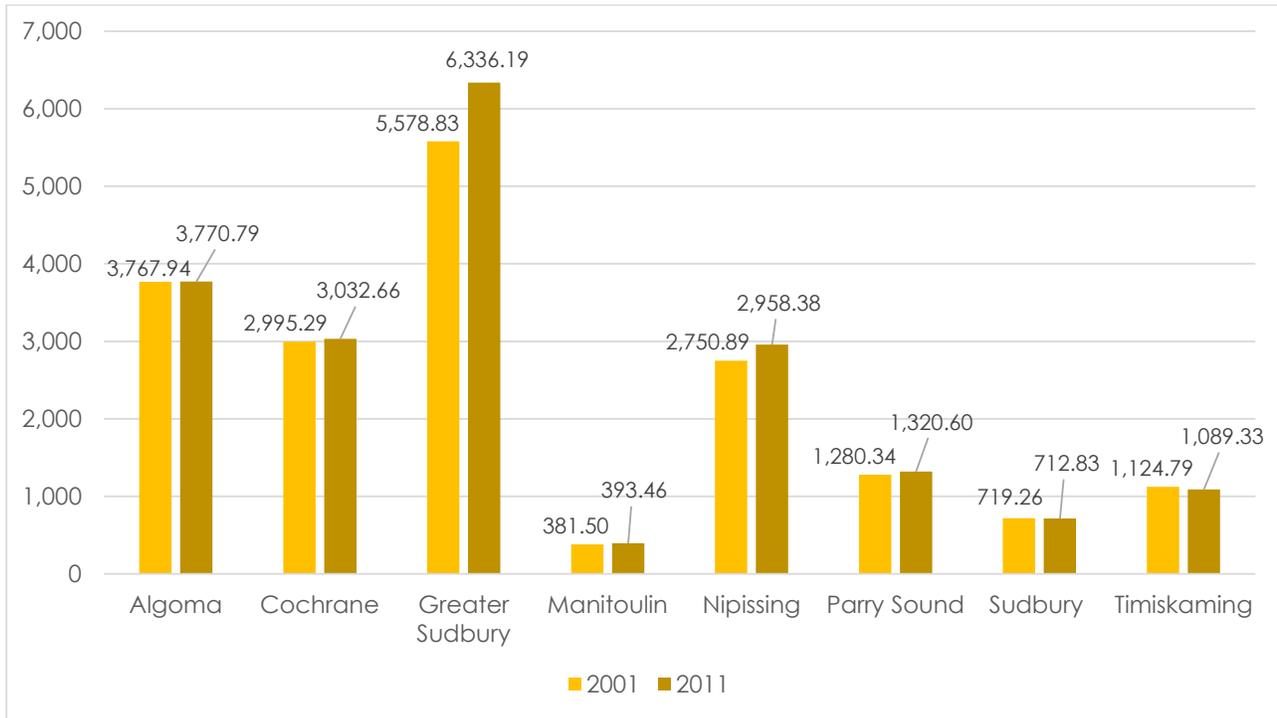
The changing size and composition of the Sudbury District's employed workforce has also impacted total labour income and output. Using detailed employment by occupation and industry data along with average employment earnings by industry and occupation, this study estimated trends in total labour income in 2010 dollars in the District, shown in Figure 21. Labour income is influenced by size, productivity and the occupational composition of the employed workforce. From 2001 to 2011, labour income in the Sudbury District decreased slightly by 0.9 percent from \$389.49 million to \$386.00 million, compared with a 6.7 percent increase in Northeastern Ontario during the same period. Assuming that the share of labour in regional gross domestic product (GDP) stayed relatively constant during 2001-2011, it is evident that the Sudbury District also experienced negative growth in GDP, from \$719.26 million to \$712.83 million, as shown in Figure 22.

Figure 21: Total Labour Income (millions of 2010 dollars), Northeastern Districts, 2001–2011

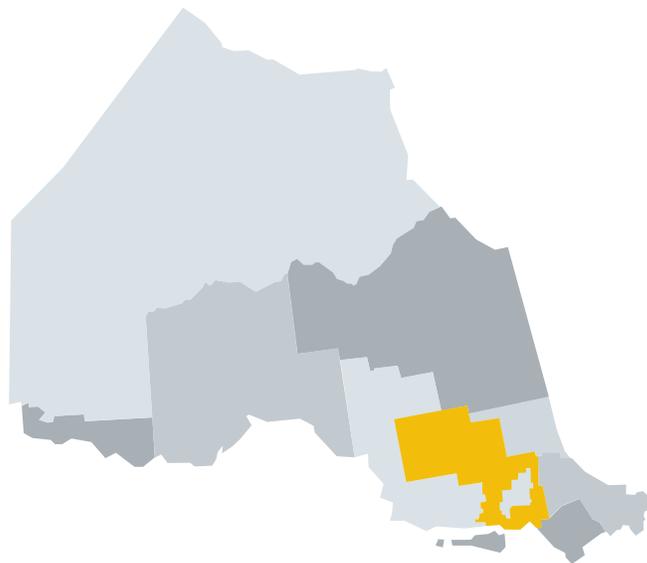


Author's calculations based on Statistics Canada, Census of Canada (various years), and National Household Survey 2011, custom tabulation.

Figure 22: Regional Gross Domestic Product (millions of 2010 dollars), Northeastern Districts, 2001–2011



Author's calculations based on Statistics Canada, Census of Canada (various years), and National Household Survey 2011, custom tabulation.



Recommendations

1. Respond to the needs of the Indigenous population

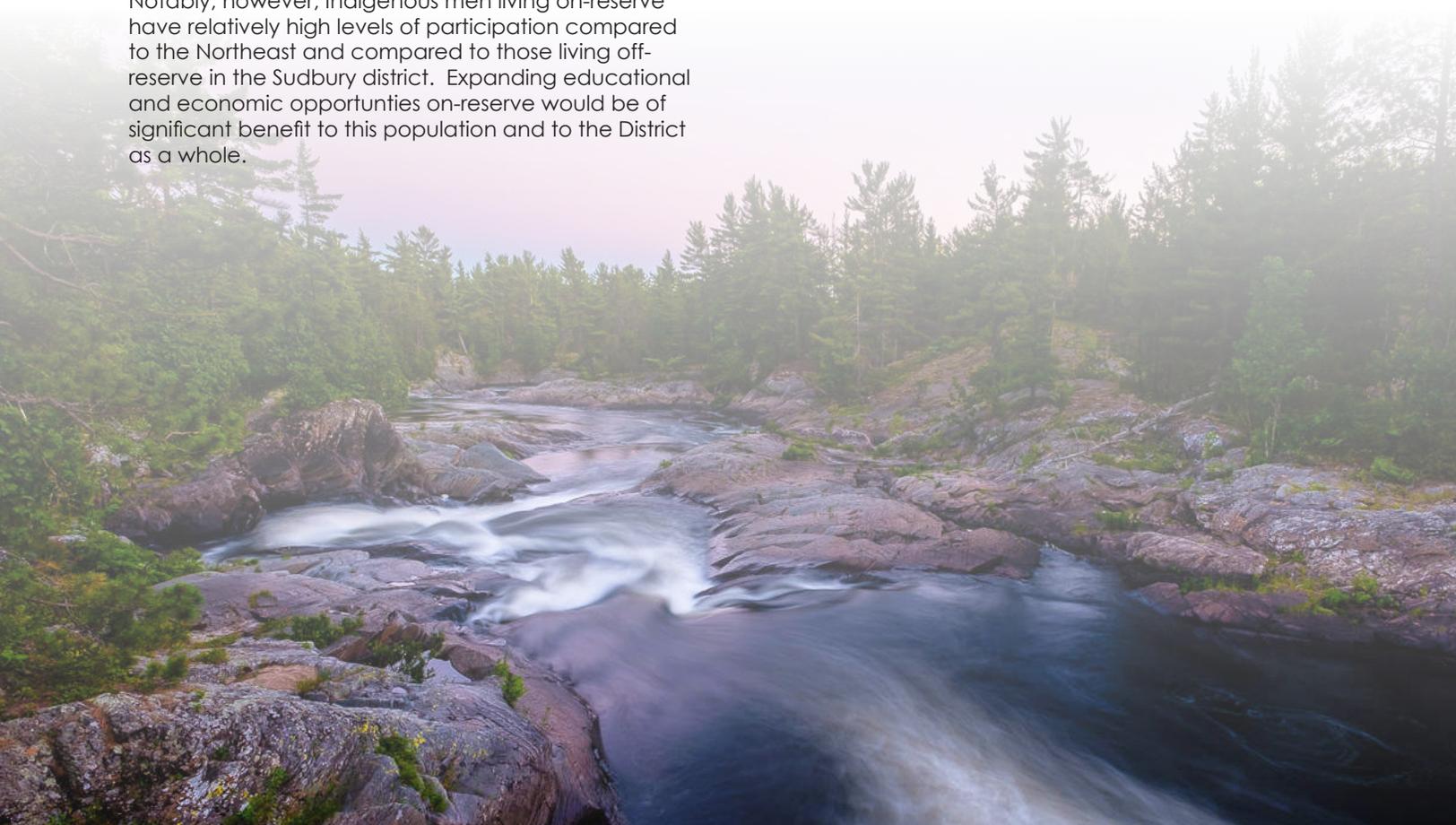
The human capital indexes for the Indigenous labour force in the Sudbury district, while below non-Indigenous population and below those in the Northeast, are higher than in Ontario and Canada. Given that the Indigenous share of the population is increasing, and given that their human capital composition is lower than total working-age population in the district as a whole, future labour productivity will decrease if education levels do not rise among this segment of the population. There is strong evidence showing that higher education and skill levels increase the likelihood of participation in the workforce and reduce unemployment rates. Addressing these issues for the Indigenous population will have positive benefits for the entire District.

2. Education and Economic opportunities must expand on or near reserves

Labour market outcomes for on-reserve populations continue to be problematic. The unemployment rate among on-reserve Indigenous men was the highest for any sub-group in the district of Sudbury at 21.4 percent. Notably, however, Indigenous men living on-reserve have relatively high levels of participation compared to the Northeast and compared to those living off-reserve in the Sudbury district. Expanding educational and economic opportunities on-reserve would be of significant benefit to this population and to the District as a whole.

3. Greater investment in the success of newcomers and Francophones is needed in the Sudbury District

The human capital indexes for immigrants and Francophones in the district of Sudbury are lower than in Northeastern Ontario, Ontario and Canada. In particular, the participation rate among immigrant women in the district was the lowest of all other sub-groups in the district. Greater investment in the success of these populations, by focusing on education and addressing barriers to participation in the labour force, will be key to a sustainable future for the district of Sudbury. Other regions in the Northeast have had success attracting and supporting these population groups. Replicating that success in the Sudbury district will be an important factor in future growth for the District.



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About Northern Policy Institute

Northern Policy Institute is Northern Ontario's independent think tank. We perform research, collect and disseminate evidence, and identify policy opportunities to support the growth of sustainable Northern Communities. Our operations are located in Thunder Bay, Sudbury, and Sault Ste. Marie. We seek to enhance Northern Ontario's capacity to take the lead position on socio-economic policy that impacts Northern Ontario, Ontario, and Canada as a whole.

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