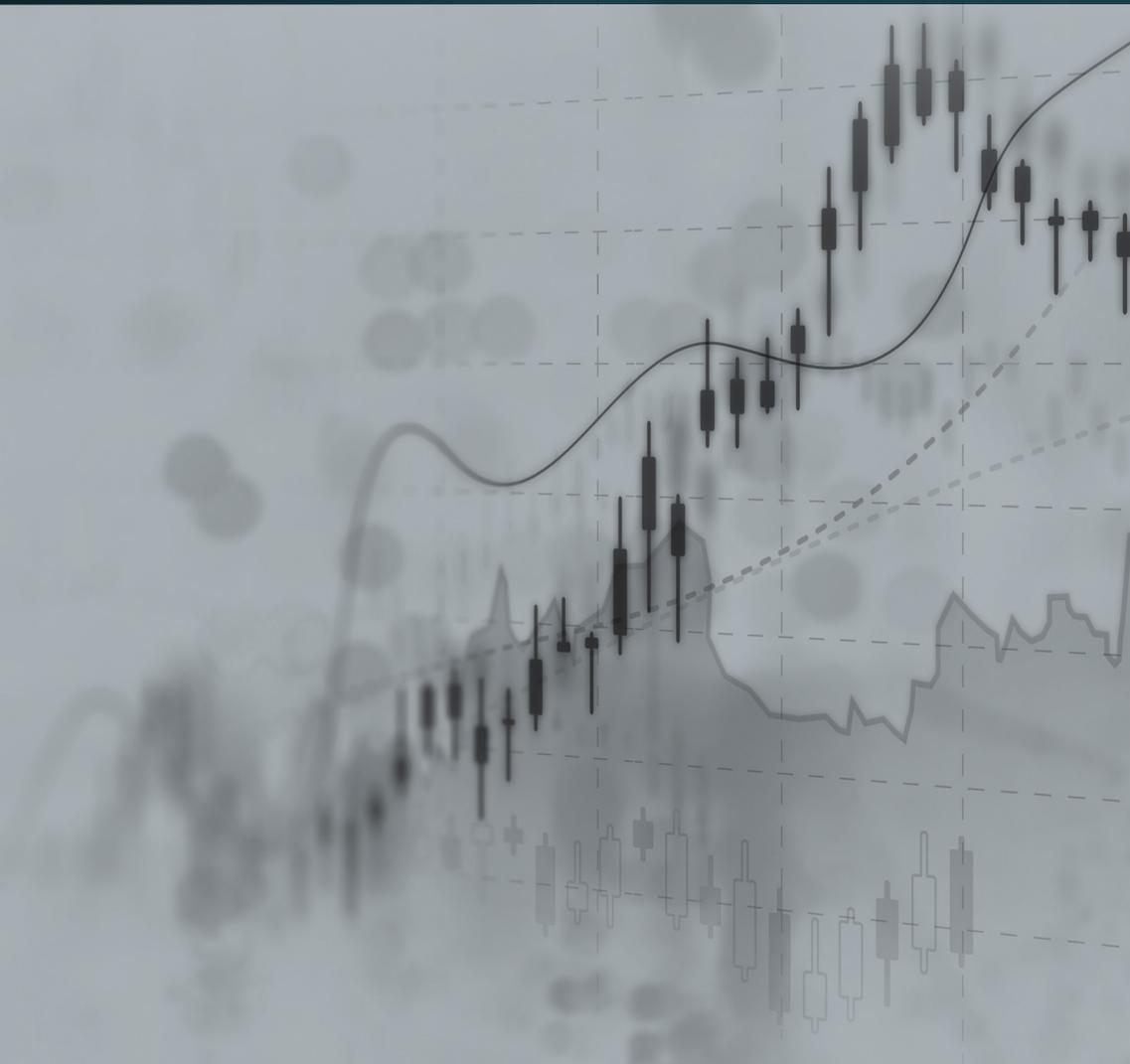




Assembly of First Nations

# Sparking Prosperity

Economic Reconciliation Report





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# Sparking Prosperity

## Economic Reconciliation Report

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# From Barriers to Prosperity: First Nations Participation in the Natural Resources and Infrastructure Sectors

## 1. Introduction

The term ‘Economic Reconciliation’ has become central to discussions as First Nations reclaim their share of wealth and resources in Canada. This concept is not only about economic inclusion but also about improving socio-economic outcomes for First Nations and addressing persistent economic gaps in employment, income and labour force participation. As such, this report examines economic reconciliation as it relates to First Nations participation and prosperity in Canada’s natural resources and infrastructure sectors.

This report provides an evidence-based assessment of current economic conditions, and it also identifies persistent gaps and systemic barriers to First Nations economic development. The report highlights the economic opportunities associated with increased First Nations involvement in the natural resources and infrastructure sectors. The analysis of current conditions is intended to support First Nations leadership, the Assembly of First Nations, and partners in advancing First Nations’ inherent right to economic self-determination. The AFN is an advocacy organization, taking direction and fulfilling mandates as directed by the First-Nations-in-Assembly. We advocate for improved economic policy, programs, services, incentives, economic relations, and increased revenue development. There are several economic opportunities with increased First Nations involvement in the natural resources and infrastructure sectors, but these opportunities can be missed if government and private sector commitments to Indigenous economic reconciliation fail to support economic self-determination.

The analysis in this report is designed to look at natural resources and infrastructure economic activities at the sector level. Within each sector there are subsectors, industry groups, and industries. High-level opportunities and barriers of a sector are not distributed evenly across its industry groups and industries, and some industries could be important exceptions to general trends found in this report. Nevertheless, the analysis of natural resource and infrastructure sectors can produce important First Nations perspectives on broad national and regional economic strategies to grow the natural resources and infrastructure sectors across Canada.

The Government of Canada, for example, has created a Major Projects office to accelerate “federal decision-making and structuring financing for projects essential to Canada’s growth” (Government of Canada, 2025). The technological and material sizes of these major projects demand billions in dollars of spending and thousands of new jobs, the Government of Canada has positioned these projects as central to a long-term economic growth strategy that could go on for decades. But from the perspective of First Nations, these broad promises of economic strategy need to recognize and respect First Nations inherent and Treaty right and First Nations rights of



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sovereignty and self-determination. Broad economic strategies also need to address systemic gaps such as the First Nations infrastructure gap. Free and equal First Nations economic participation in Canada is undermined by gaps in community infrastructure, education, and access to capital for economic development.

Section 2 of this report presents themes and concepts of Indigenous economic reconciliation. These themes and concepts show the importance of economic reconciliation in a broader project of Indigenous reconciliation in Canada. Economic reconciliation is, fundamentally, tied to Indigenous rights of self-determination. This means that short-term or partial improvements to Indigenous economic well-being can be important to individuals and households but still fail to advance First Nations economic self-determination. In addition to long-term improvements to employment opportunities, First Nations can exercise greater economic self-determination through ownership and control of their participation in natural resources and infrastructure projects.

Section 3 uses many figures and tables to define economic baselines of First Nations participation in Canada's natural resources and infrastructure sectors. The section provides an overview of the natural resources and infrastructure labour markets, detailing total employment, the balance between employed and self-employed workers, and average employment income across the sectors. The section analyses the size of each sector through multiple indicators, including the number of active businesses, total industry revenues, expenses, and net income, as well as contributions to GDP and real value added. Federal government participation is quantified through available data on tax revenues, public spending, and investments. Finally, the baseline includes estimates of First Nations economic impact, including labour force participation, employment income, and industry activity.

Section 4 builds from Section 3 by forecasting First Nations employment, output, GDP, and labour income of the natural resource and infrastructure sectors. These forecasts will estimate total amounts across Canada and by region, as well as estimate First Nations employment and contributions to GDP.

Section 5 returns to themes of Section 1 and analyzes how First Nations participation and prosperity in the natural resources and infrastructure sectors depend on the continued commitment to economic reconciliation. The section identifies systemic barriers that exclude First Nations from economic opportunities in the natural resources and infrastructure sectors. The section also provides examples of how the capacity for First Nations economic self-determination can be built through governance and benefit sharing.



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## 2. Themes and Concepts of Indigenous Economic Reconciliation in Canada

### 2.1 Definitions of Indigenous economic reconciliation

Economic reconciliation is not any one action or tactic, but rather a concept that acknowledges the historical and ongoing impacts of Canadian colonialism on the economic well-being of Indigenous communities in Canada. Meaningful acts of economic reconciliation can improve Indigenous economic well-being and remove systemic barriers to investment, procurement, employment, education, training, and promotion.

Over the past few years, the term “economic reconciliation” has come to describe a state where First Nations have greater voice in determining the economic direction of Canada, share in the country’s wealth and resources, and where economic inclusion drives improved socio-economic outcomes for First Nations.

The AFN’s vision of economic reconciliation emerged from its work on behalf of First Nations and includes the following:

- Recognition of First Nation rights – including Section 35 rights, recognizing, and fulfilling obligations related to treaty and Aboriginal rights, implementation of the United Nations Declaration of the Rights of Indigenous Peoples (UNDRIP), addressing and reparations for historical grievances (including specific claims, implementation of Treaty Land Entitlement and Additions to Reserves), refuting the Doctrine of Discovery, and meaningful sharing of land.
- Recognition of First Nation jurisdiction – including legal recognition, and support for the effective exercise, by Canada, of First Nation jurisdiction over all matters impacting First Nation people and communities.
  - » For economic and business development, this includes matters such as land management, financial management, taxation, data and information, access to capital and financial services, infrastructure, governance and law-making.
- First Nations involvement and participation in major economic development projects – including fulfilling obligations relating to consultation and accommodation, free, prior, and informed consent on projects that impact rights, opportunities to benefit economically (resources revenue sharing, resource charge, equity participation), and participation in the socio-economic benefits that projects generate (procurement, business partnerships, employment, and training).
- The New Fiscal Relationship – including the implementation of the recommendations in the 2019 report of the Joint Advisory Committee of Fiscal Relations (JACFR).
- Support for business development and labour market participation – including improved access to capital, business supports, a higher share (5%) of federal procurement, more supports to improve employment outcomes.
- Strengthened governance capacity – including support for First Nations governments, capacity-building, good governance, institutional development, and a First Nations public service.



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As there is no fixed or single strategy to furthering economic reconciliation, the improvement of Indigenous economic well-being can come from:

- Changes to Indigenous governance, law, and policy (*Indian Act*; pre-modern and modern treaties; policies about status and rights; jurisdiction and sovereignty) (Alcantara & Nelles, 2016; Brown, Doucette, & Tulk, 2016; Keay & Metcalf, 2021; OECD, 2020);
- Changes to procurement policies (Indigenous procurement goals; Indigenous business directories (Henriques, Colbourne, Peredo, Anderson, & Wanuch, 2024);
- Support of Indigenous business development (entrepreneurship; financing and banking; funding; training; employment) (Long, 2022; MacKinnon, 2015);
- Increases of opportunity for the education, training, and mentorship of Indigenous people seeking employment (Indigenous schools and institutions; grants and scholarships; reviews of systemic racism in Canadian education) (Handouyahia, Wilane, & Bouwer, 2022; MacKinnon, 2015).

Economic reconciliation policies can be cross-sectoral in scope or designed to target specific industries, regions, or population groups within Indigenous communities. A key takeaway of a Government of Canada roundtable discussion on economic reconciliation was how the closing of the infrastructure gap in Indigenous communities was the “number one priority of economic reconciliation .... Closing the infrastructure gap is a precursor to economic development<sup>1</sup>.” Education and occupational training for Indigenous youth can combat youth unemployment in Indigenous communities and can help match jobseekers with regional or sector-based opportunities (Handouyahia, Wilane, & Bouwer, 2022).

A compiled list of opportunities for economic reconciliation can make future Indigenous economic growth seem like a guaranteed pathway. Yet we need to understand how Canadian colonialism can remain, today, a barrier to meaningful economic reconciliation. Moreover, effective, and meaningful economic reconciliation with Indigenous peoples will require that Canadians uphold a commitment to Indigenous self-determination. The paternalistic attitude of Canadian colonialism has not gone away if Canadians design policies and strategies of economic reconciliation without Indigenous engagement or with assumptions of what is best for the growth of Indigenous prosperity. The absence or underrepresentation of Indigenous leadership and knowledge in the design of economic reconciliation can weaken its effects or expose policies and strategies to risks of controversy. One such risk of controversy is the federal Indigenous Business Directory and its erosion of trust as a standard to use for awarding government procurement to Indigenous businesses. As has been argued by Assembly of First Nations Regional Chief Joanna Bernard, the federal Indigenous Business Directory lacks the transparency to demonstrate how the Government of Canada is “verifying the legitimacy of Indigenous businesses.” This creates risks of “false claims, tokenism ... [or the] exploitation of bad actors,” such as by those who create shell companies claiming to be Indigenous-owned (Cram, 2024).

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<sup>1</sup> Quotation taken from [Economic Reconciliation Roundtable I: What we heard](#).



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## 2.2 Current statistics on Indigenous economic gaps in Canada

Philosophies or policies of Indigenous reconciliation, in Canada or elsewhere, will tend to use socio-economic statistics to identify gaps between economic outcomes of Indigenous and non-Indigenous populations in the same regions. This subsection will use available socio-economic data from found from Statistics Canada, Indigenous Peoples Survey, Community Well-Being index, Parliamentary Budget Officer reports, and Closing the Infrastructure Gap reports to measure the progress of Indigenous reconciliation in Canada. Progress is defined as the closing of an economic gap. Several economics gaps exist between First Nations and non-Indigenous, these gaps serve as proxy indicators for this report. For example, if First Nations unemployment is 6% and non-Indigenous unemployment is 4%, the gap in this case is 2% and there is measurable progress when the number gets smaller.

Before proceeding, two comments on the limits of quantitative measurement are warranted. First, the measurement of an economic gap cannot say much about the gap's broader social significance. Surrounding each economic statistic about Indigenous peoples in Canada is a larger socio-economic story of current and historical barriers to Indigenous economic self-determination, which is a recognized inherent right of Indigenous peoples. Consequently, opportunities or challenges to closing of an economic gap are shaped by the social *mechanisms* that Indigenous peoples can use to decolonize economic activities or to design new ways for Indigenous economic participation. Examples of the mechanisms for First Nations communities will be given in Section 2.3.

Second, current economic variables will not fully capture the outcomes of Indigenous economic reconciliation. There are social and cultural components to the way people treat each other when they work, buy, or sell. Indigenous economic reconciliation is furthered, but not necessarily quantified, when Indigenous people can freely participate in society without discrimination against their culture, histories, and rights.

### 2.2.1 Employment

---

First Nations employment gaps can be measured at various levels of detail. First there are broad trends by Indigenous identity. **Figure 1** shows the history of unemployment rates in Canada, grouped by Indigenous identity. In the top panel are two series. The thin dotted blue line is the unemployment rate for First Nations in Canada, 15 years and over. The solid lighter blue line is the unemployment rate for non-Indigenous people in Canada, 15 years and over. Both series use monthly data from 2008 to 2025 and are smoothed as 24-month trailing averages. The bottom panel is the economic gap, which is measured by subtracting the non-Indigenous unemployment rate from the First Nations unemployment rate.



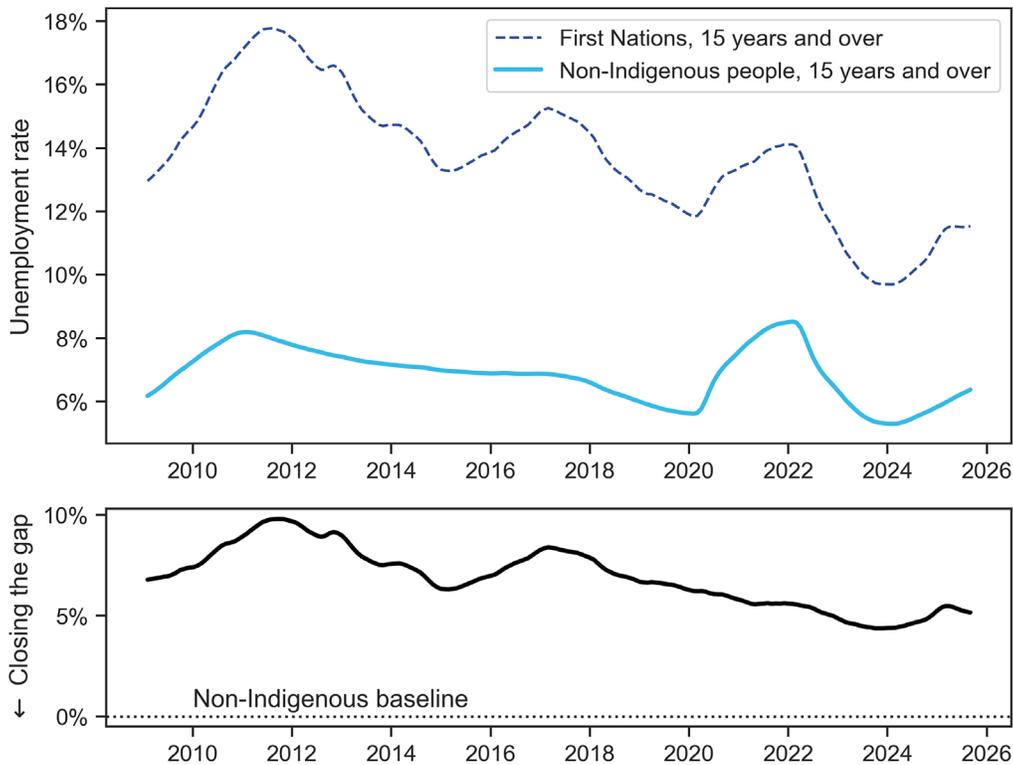
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**Figure 1: Unemployment Rates, by Indigenous identity**

Note: series are smoothed as 24-trailing averages

Source: (Statistics Canada, 2026)



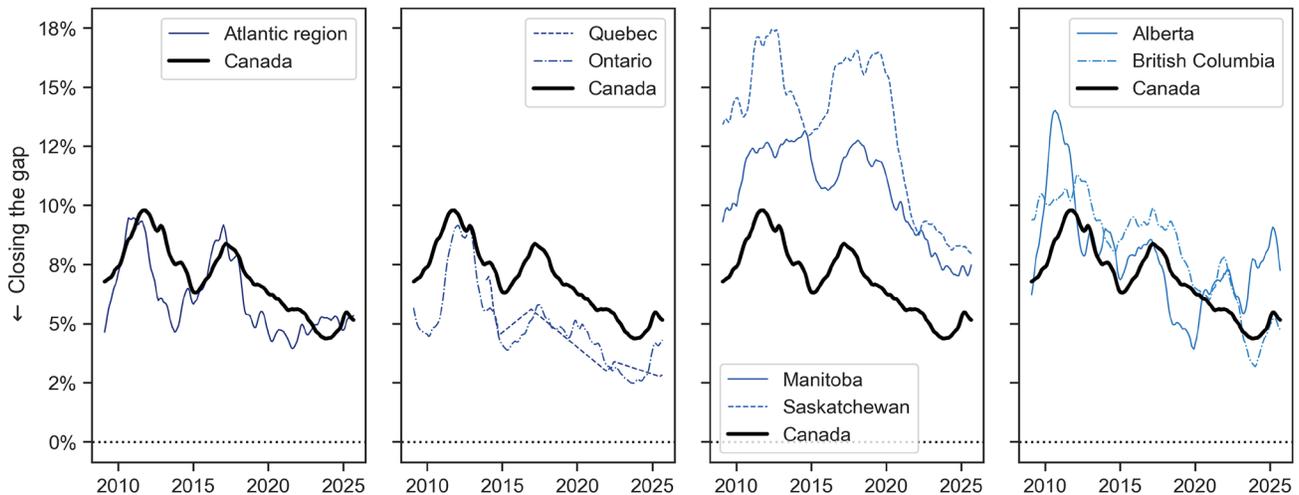
The trends in Figure 1 are representative of how Indigenous economic reconciliation works at different timescales. The unemployment gap in Figure 1 has been closing over the long term, from 2008 to 2025. In 2012, First Nations were likely to experience an unemployment rate that was 10% higher than the non-Indigenous rate; in 2023, the 24-month unemployment gap was 4.3%. Figure 1 also shows that contained within a long-term closing of the gap are periods when the gap widens from spikes in First Nations unemployment. These events indicate how First Nations experiences of unemployment can be different from, or more severe than, non-Indigenous experiences of unemployment in Canada. The experience of First Nations unemployment since 2023 is an important example. Unemployment in Canada has been rising since 2023, but the First Nations unemployment rate rose faster and widened the unemployment gap to over 5%.



**Figure 2** shows the regional and provincial trends of the First Nations unemployment gap. For many parts of Canada, the regional or provincial trend of the First Nations unemployment gap is like the national trend, which is drawn in black. However, the differences between certain provinces are worth noting. The shapes of the Manitoba and Saskatchewan First Nations unemployment gaps are like the national trend, but the historical sizes of the gaps are above the national average. The trend in Alberta was similar to the national trend until 2020. Since then, First Nations unemployment gap in Alberta has been *widening*.

**Figure 2: First Nations unemployment gaps, by region or province**

Source: (Statistics Canada, 2026)



### 2.2.2 Economic Output

Economists define output as a dollar measure of all sales of goods and services, both final and intermediate. Output is, by definition, larger than GDP; the latter measures final sales and does not include the value of intermediate goods. Estimates of Indigenous economic output in Canada are found in the Indigenous Peoples Economic Account (IPEA), which was created to estimate the Indigenous economic contribution to the Canadian economy.

*Meaningful* Indigenous economic reconciliation will likely appear in measurements of economic output. Indigenous employment, procurement, funding, and government expenditures would be just some of the reconciliation-based initiatives that could count as added Indigenous economic output.



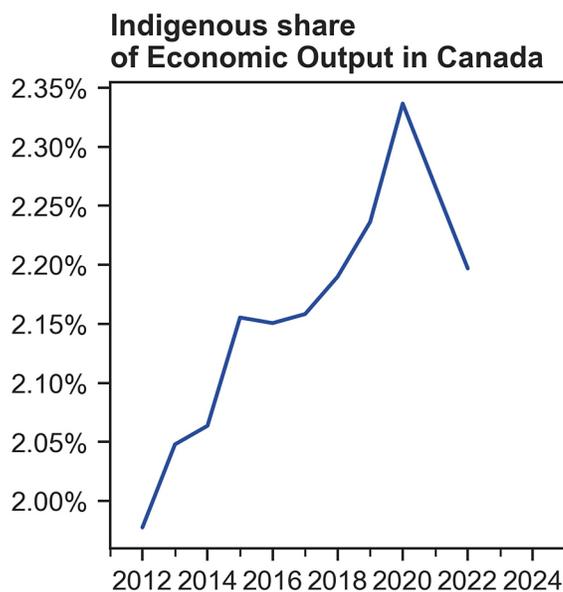
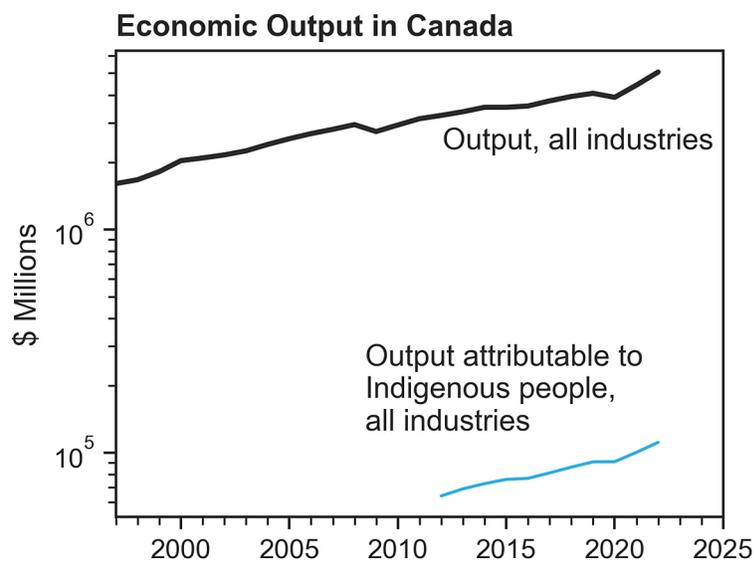
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**Figure 3** plots the economic output of all industries in Canada, as well as the output that IPEA defines as attributable to Indigenous people. The panel on the right shows the share of Indigenous economic output in Canada. Indigenous economic output has been steadily increasing since 2012. Furthermore, the share of economic output that is attributable to Indigenous people has increased from less than 2% in 2012 to around 2.2% in 2022.

**Figure 3: National and Indigenous economic outputs**

Source: (Statistics Canada, 2025)





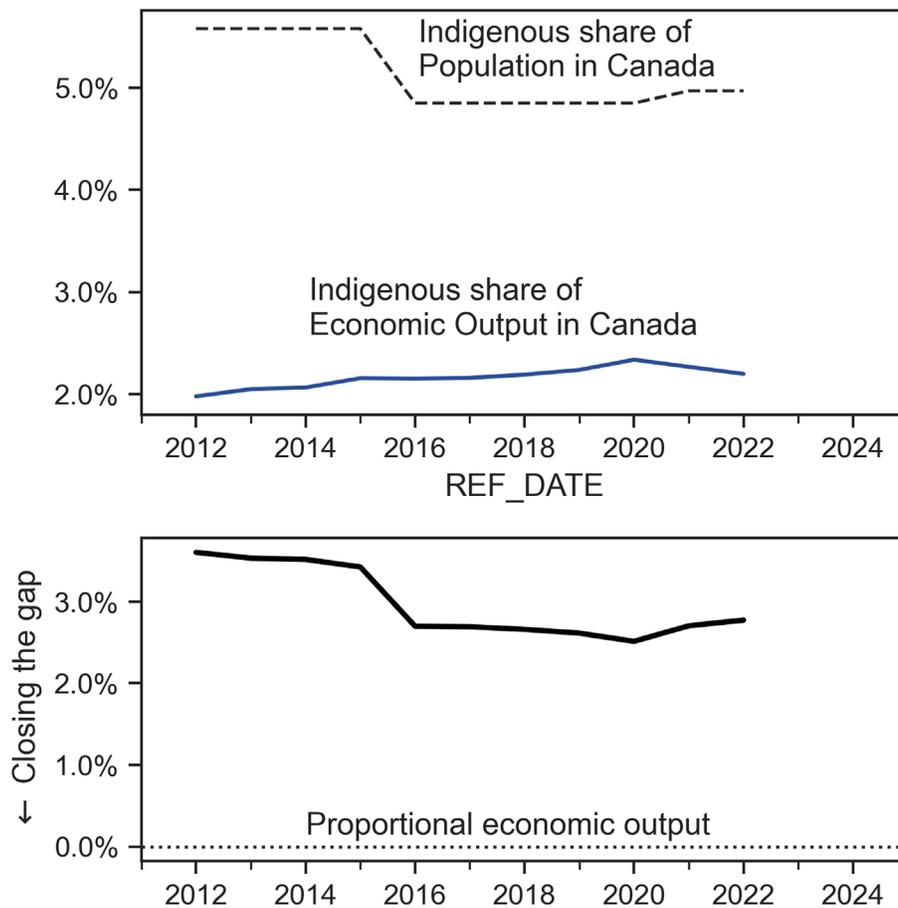
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An output gap can be estimated, but in a different way from the measurement of the unemployment gap. Levels of economic output cannot be easily compared if the non-Indigenous population is significantly larger than the Indigenous population. **Figure 4** uses the approach of proportional economic representation, whereby the economic output of Indigenous peoples is measured against the size of its population. In this case, the output gap is the difference between the Indigenous share of the total population in Canada and the share of Indigenous economic output in the Canadian economy.

**Figure 4: Proportional share of Indigenous economic output in Canada**

Source: (Statistics Canada, 2025)



The output gap has narrowed in the past decade. However, like the unemployment gap, the output gap has had at least one period of widening. The widening of the output gap from 2020 to 2022 raises questions about disproportionate economic effects of the COVID-19 Pandemic in Indigenous communities. A declining share of Indigenous economic output following 2020 would signal widening structural disparities in economic recovery. This reality then demonstrates that Indigenous economic output slowed more than the Canadian economy.



### 2.2.3 Government expenditures

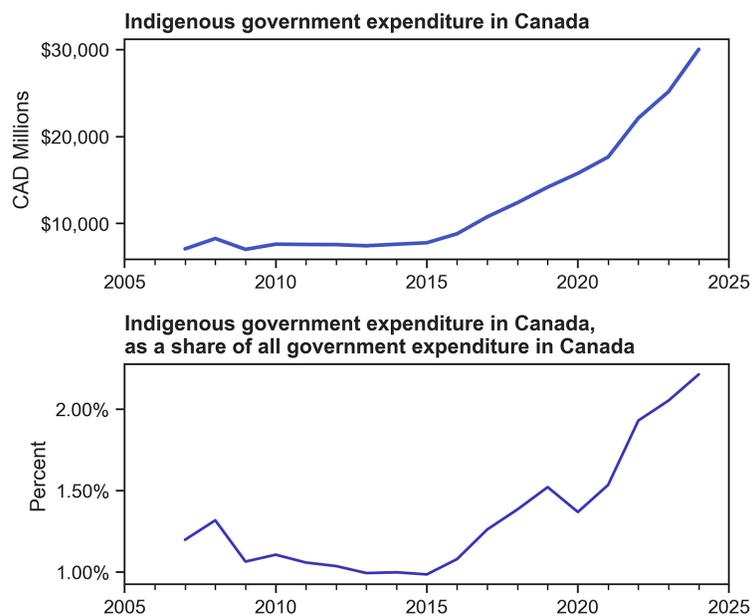
Data on Indigenous government expenditures can reveal the extent to which Indigenous communities can deliver social, cultural, and other services for citizens of their communities. Moreover, in a changing landscape of Indigenous business growth and partnerships, government expenditures can be an indicator of income flowing through an Indigenous community. For example, many First Nations in Canada have corporations for off-reserve investments, services, and other initiatives. Income from these corporations would be included in community financial statements and the spending of this income could be counted as the First Nations government expenditure of a Band, Tribal Council, or Self-Government.

Changes in Indigenous government expenditures can also be an effect of changes to sources of Indigenous government funding. New funding opportunities for Indigenous governments could come from own-source revenue, federal and provincial funding, Treaty and other settlements, Indigenous tax codes,<sup>2</sup> or debt.

**Figure 5** shows total Indigenous government expenditure in Canada has risen significantly from 2015 to 2024. From 2007 to 2015 Indigenous government expenditure stagnated below \$10 billion annually, as well as a share of all government expenditure in Canada. Since 2015 Indigenous government expenditure in Canada has risen around \$30 billion annually. This type of expenditure now counts for more than 2% of all government expenditure in Canada.

**Figure 5: Indigenous government expenditure**

Source: (Statistics Canada, 2025)



<sup>2</sup> Section 83 of the *Indian Act* allows First Nations to implement taxation for “local purposes”. The *First Nations Fiscal Management Act* (2005) enables First Nations, among other things, implement tax codes in a larger financial management system. Feir, Jones, and Scoones estimate that, as of 2021, 149 nations have implemented tax law – 49 through Section 83 and 100 through the *First Nations Fiscal Management Act* (Feir, Jones, & Scoones, 2024).



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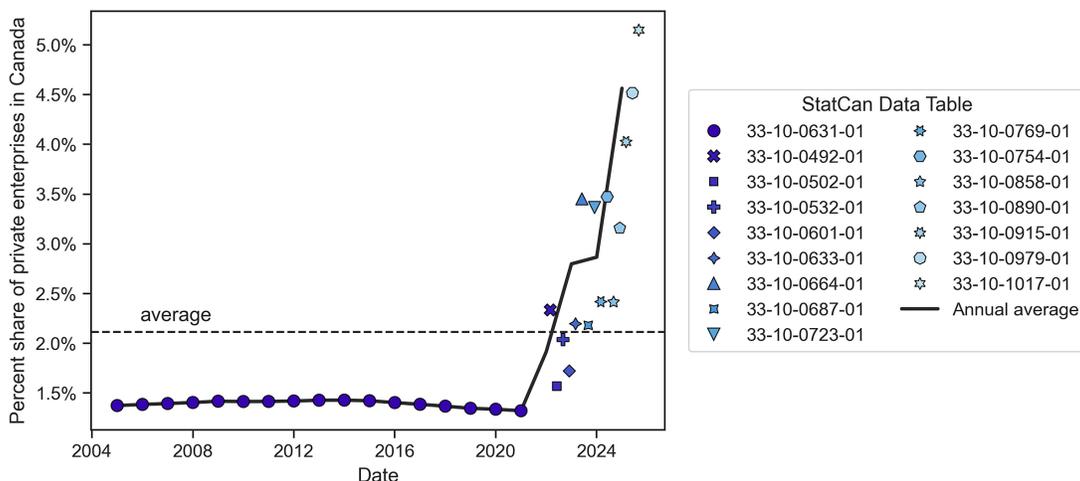
It is difficult to mark the line where a dollar-amount of government spending is sufficient for Indigenous well-being or self-determination. Yet the upward trend of Indigenous government expenditures is currently a positive sign. The continued growth of Indigenous government spending will depend on several factors, including the extent to which First Nations spend new income through its network of governments.

#### 2.2.4 Business Ownership and Indigenous Procurement

Recent changes in the number of Indigenous businesses in Canada demonstrate the importance that Indigenous business ownership will have when Indigenous procurement policies are adopted in across the Canadian economy. Typically, an Indigenous procurement policy will make two fundamental commitments. First, a policy will define the amount or share of procurement that will go to Indigenous businesses. Second, a policy will define what will count as an Indigenous business for the sake of procurement. A common standard is for a business to be majority-owned by First Nations, Inuit, or Métis peoples. Other standards, such as share of income, can be there to ensure that the benefits and interests of Indigenous owners or partners are not subordinate to the benefits and interests of non-Indigenous participants.

Some of the controversies of current Indigenous procurement policies in Canada, which will be explained below, will inform how people evaluate any data that estimate the business dynamics of Indigenous ownership. Take, for example **Figure 6**. The figure has combined multiple surveys from Statistics Canada to produce a historical plot of Indigenous business ownership in Canada, as a share of all private businesses in Canada. From 2005 to 2021, the share of Indigenous business ownership in Canada flatlined below 1.5%. This historical evidence is, ironically, less controversial for Indigenous businesses, entrepreneurs, and others. A 2016 business survey conducted by the Canadian Council of Indigenous Business reported that access to capital and that the patchwork nature of funding made it difficult for businesses to start up or expand (Canadian Council for Aboriginal Business, 2016). What happened after 2021? Did certain systemic barriers to Indigenous business growth disappear?

**Figure 6: Share of private enterprises that are majority-owned by Indigenous peoples**





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The spike in Indigenous business growth, as a share of all private businesses in Canada, is an astonishing effect of Canada setting a 5% minimum procurement target in 2021. However, controversies do circle around current Indigenous procurement policies, and this makes it difficult for the upward trend in Figure 6 to be a straightforward indicator of true Indigenous business growth. An Indigenous procurement policy can be an opportunity for pursuing economic reconciliation with Indigenous peoples, but such a policy necessitates checks and balances to ensure that Indigenous communities, organizations, or businesses are the benefactors of procurement. The AFN has advocated for greater scrutiny of the Indigenous Business Directory (IBD), which is the directory the Government of Canada uses for Indigenous procurement. Greater scrutiny is needed to ensure that Indigenous businesses are what they say – owned by people, organizations, or communities that can verify their Indigenous identities – and that joint-venture procurement does not count non-Indigenous spending toward Indigenous procurement goals.

The First Nations Procurement Authority (FNPA) represents a significant advancement in economic reconciliation by creating a First Nations-led mechanism to increase Indigenous participation in public and private sector procurement. Established on May 1, 2025, the FNPA aims to provide targeted outreach, training, and support to verified First Nations businesses interested in securing government and corporate procurement opportunities (National Aboriginal Capital Corporations Association, 2025). By shifting decision-making power to First Nations and supporting the growth of Indigenous enterprises, the FNPA helps address long-standing structural barriers, expands economic opportunities, and contributes to more equitable distribution of economic benefits across communities.

Capacity gaps can undermine the effectiveness of Indigenous procurement policies. Contracts for goods and services can be made available to Indigenous bidders, but successful bids must still meet, among other things, technical, operational, financial, and legal requirements. Indigenous bidders could not only struggle to meet bid requirements, but the generational effects of colonialism could have created deep systemic gaps in Indigenous education, infrastructure, and access to capital.

In pursuit of achieving a 5% Indigenous procurement target, federal departments and agencies report on gaps in Indigenous procurement. Gaps are organized by “economic object,” which is the category of a good or service that a department or agency intends to purchase. **Figure 7** shows the top economic objects, ranked by the number of departments or agencies that listed these economic objects as Indigenous procurement gaps in 2025-2026. There are common themes in the list of Indigenous procurement gaps. Several economic objects relate to science and information technology. Other economic objects could be grouped as technical and research services. Difficulties for Indigenous bidders to supply materials could be related to scale or access to supply chains.

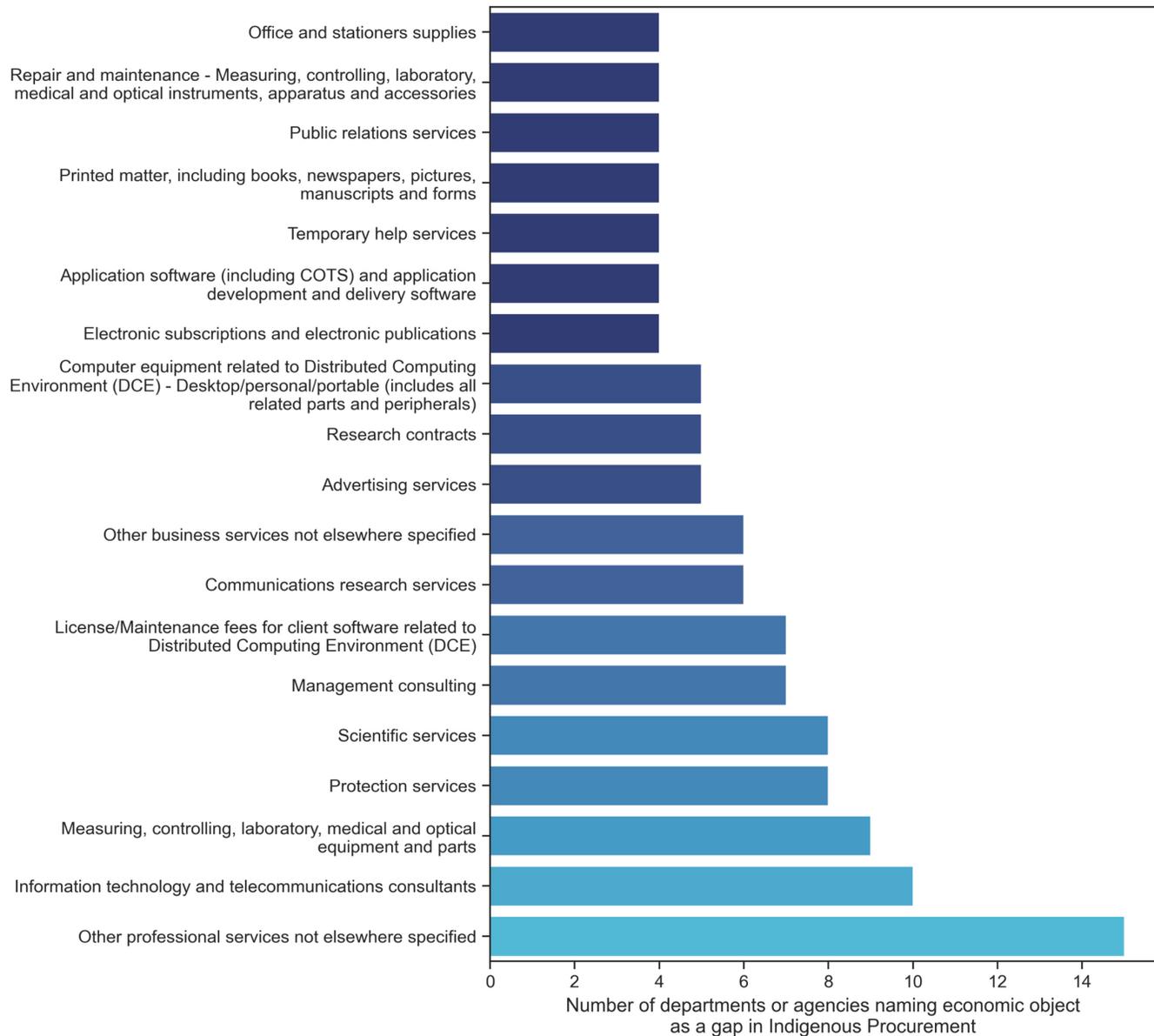


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**Figure 7: Economic objects listed as gaps in Indigenous procurement**

Source: (Government of Canada, 2025)





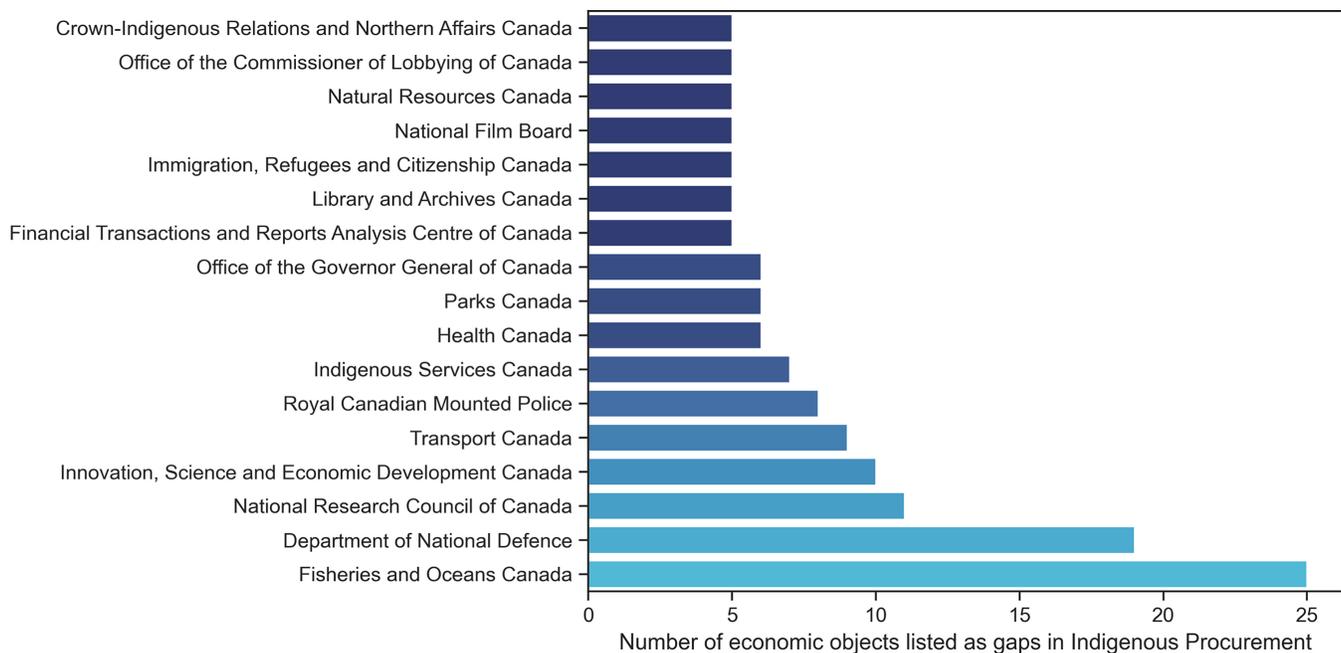
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The characteristics of capacity gaps in Indigenous procurement can also be inferred from the federal department and agencies that list the highest number of economic objects. **Figure 8** ranks departments and agencies by the number of economic objects they list as Indigenous procurement gaps in 2025-2026. Indigenous procurement opportunities are being lost in several departments and agencies, but those with the largest number of listed gaps have things in common. Goods and services for Health Canada, Fisheries and Oceans Canada, and the Department of National Defense could require specialized knowledge of equipment or processes. The demand for technical and research services could explain why many procurement gaps are listed in Innovation, Science and Economic Development Canada, and the National Research Council of Canada.

**Figure 8: Gaps in Indigenous procurement, counted by department or agency**

Source (Government of Canada, 2025)





## 2.3 Mechanisms to further Indigenous economic reconciliation in Canada

This section will review key mechanisms to furthering Indigenous economic reconciliation in Canada. In this case, a mechanism is any law, agreement, or policy that holds people in Canada accountable to the goals of Indigenous economic reconciliation. A law, agreement, or policy may not explicitly refer to “economic reconciliation,” but the accountability to economic reconciliation can come from an obligation to one or more of economic reconciliation’s goals: Indigenous self-determination, employment, investment, etc.

It should be noted that the mechanisms to further Indigenous economic reconciliation are not applied universally. The furtherance of Indigenous economic reconciliation in Canada can be affected by provincial and territorial laws, Indigenous history, geography, and other factors. For example, some First Nations have treaty agreements with the Crown, while the traditional territories of other First Nations are, as of 2025, unceded. The economic well-being of some First Nations can be impacted by the regulations and policies of certain industries or the price of some commodities. For example, impact benefit agreements (IBAs) can pay First Nations through royalty payments, and royalties can fluctuate with industry performance.

### 2.3.1 Inherent and Treaty Rights

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The inherent right of Indigenous peoples to self-govern is recognized in Section 35 of the Canadian Constitution. As stated by the Government of Canada,

*Recognition of the inherent right is based on the view that the Aboriginal peoples of Canada have the right to govern themselves in relation to matters that are internal to their communities, integral to their unique cultures, identities, traditions, languages and institutions, and with respect to their special relationship to their land and their resources.*

Canada’s recognition of inherent Indigenous rights has been deepened through the adoption of the *United Nations Declaration on the Rights of Indigenous Peoples Act* (2021). This act incorporates the *United Nations Declaration on the Rights of Indigenous Peoples* (UNDRIP) into Canadian law. Section 3 of UNDRIP states:

*Indigenous peoples have the right to self-determination. By virtue of that right they freely determine their political status and freely pursue their economic, social and cultural development.*

Inherent Indigenous rights to self-determination can affect economic reconciliation explicitly, such as when Indigenous rights are deemed to be impacted in infrastructure and natural resource projects, or implicitly, such as when inherent Indigenous rights are the inspiration for new employment and procurement policies.

Treaties define rights and obligations between the Crown governments and Indigenous groups. Historic and modern treaties define some of the economic obligations that the Canadian government has toward First Nations. Moreover, active treaties can function as the framework for negotiations between Indigenous groups and the Government of Canada (OECD, 2020).



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Differences between historic and modern treaties will impact how economic benefits are transferred to First Nations in their agreement with the Crown. For example, treaties signed between 1871 and 1921 agree to pay First Nations members annuities, while modern treaties signed after 1975 do not have member annuity payments and economic opportunities are generally defined through land use. Despite these differences, treaty rights have been important to the fundamental principle that settlers are using Indigenous lands for social and economic gain (Mason, Jones, & Helgason, 2020).

While economic benefits can come from the recognition of Indigenous inherent and treaty rights, the size and delivery these benefits to Indigenous peoples are complicated by interpretations of how public and private institutions *commit* to Indigenous rights. What the government sees as a satisfactory treaty or rights-based commitment could be seen as a failed commitment from an Indigenous perspective. Annuities in historic treaties are a key example. The Canadian government interprets annuity payments strictly -- \$5 is \$5 forever and will not be adjusted for inflation or for the current value of land (Mason, Jones, & Helgason, 2020).

Differences of interpretation of Indigenous inherent and treaty rights can produce long processes of negotiation, litigation, and other pursuits of settlement. Economic benefits to Indigenous communities might still come from a settlement or new agreement, but Indigenous communities carry risks that other parties in negotiation or litigation do not (OECD, 2020). Indigenous communities may lack the financial and organizational capacity for prolonged litigation. A proposed agreement or partnership can also ask for Indigenous communities to extinguish their inherent rights under specific terms, and the long-term benefits of extinguishing Indigenous rights for an agreement or partnership could be difficult to predict.

### 2.3.2 Benefit Agreements

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Often called Impact Benefit Agreements (IBAs), benefit agreements (BAs) are signed commitments to share with Indigenous communities the revenues, profits, employment, or other socio-economic benefits of projects that use or impact the natural resources of Indigenous traditional territory. Use or impact can be broadly defined, but typically BAs account for the environmental and social impacts of projects that will use, modify, or alter the environment.

The terms of many BAs are confidential, but BAs that are available to the public indicate there are common themes to the benefits.<sup>3</sup> Financial benefits are set through payment amounts or percentages of a price. The timing, frequency, and end of financial payments are also set in the agreement. Employment benefits can come from hiring Indigenous staff, but it also can come through commitments to training and education.

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<sup>3</sup> Simon Fraser University provides summary statistics of publicly-available IBAs through the [Impact Benefit Agreements Database](#).



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Every BA, implicitly or explicitly, defines the meaning of Indigenous control in the lifetime of a project, such as a mine. The commitments of some BAs -- financially substantive or not -- will carve out new opportunities for Indigenous communities to have greater influence through decision-making, monitoring, or other roles. Other BAs can limit, rather than create opportunities for Indigenous governance. Within environmental monitoring, the terms of a BA could, as written, ignore Indigenous involvement at key meetings, set bad policies about Indigenous data collection, or fail to give Indigenous participants the power to overrule decisions that severely impact Indigenous communities (O’Faircheallaigh, 2020).

### 2.3.3 Set asides for Indigenous procurement

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Set-aside policies can be seen as the mechanism that bolsters Indigenous procurement initiatives as policy. Without set-aside policies, meeting the goals of Indigenous procurement can become difficult, especially if Indigenous businesses, communities, or organizations already experience several systemic barriers related to the financing, staffing, and growth of businesses.

Set-aside policies set measurable goals related to the value or number of contracts that are awarded to Indigenous businesses. Set-aside policies also pressure governments to identify and address barriers that previously prevented Indigenous businesses, communities, or organizations from winning government contracts in the past. For example, set-asides are only meaningful if Indigenous bidders know how to successfully navigate procurement processes. The Council for the Advancement of Native Development Officers (CANDO) provides workshops to help Indigenous businesses understand the details of set-asides and the System for Award Management (SAM) (Henriques, Colbourne, Peredo, Anderson, & Wanuch, 2024).

While set-aside policies are a central mechanism for advancing Indigenous procurement, there are flaws that can create unintended consequences if poorly designed or weakly enforced. One persistent flaw is tokenism; whereby Indigenous participation is formal rather than substantive. For example, Indigenous businesses are included as business partners in joint ventures, but have limited control, decision-making authority, or economic benefit. In these cases, set-asides can satisfy procurement targets without meaningfully advancing Indigenous economic self-determination.

Another related flaw is misrepresentation and bid-rigging. This could include using shell companies or Indigenous ownership structures that allow non-Indigenous firms to capture the majority of the contract value while presenting themselves as a legitimate Indigenous business. These practices undermine trust in procurement systems. Without transparent verification, clear ownership and control thresholds / criteria, and ongoing compliance monitoring, set-aside policies in public procurement create power imbalances, putting Indigenous businesses at a disadvantage. It has been argued by the Assembly of First Nations Regional Chief Joanna Bernard that the federal Indigenous Business Directory lacks the transparency to demonstrate how Indigenous businesses are verified and questions the legitimacy of Indigenous businesses. As Regional Chief Joanna Bernard stated, “There is currently no consistent way of verifying the legitimacy of Indigenous businesses, which creates a risk of false claims, tokenism... exploitation of bad actors” (Cram, 2024).



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### 2.3.4 Corporate and consumer initiatives

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Corporations and consumers are different components of the Canadian economy, but what they have in common is that many of their commitments to economic reconciliation are *voluntary* and depend on social attitudes about the importance of Indigenous reconciliation in Canada. Voluntary does not mean ineffectual, nor does it mean there are no other advantages to a consumer or corporation pursuing economic reconciliation -- a corporate reconciliation action plan (RAP) could, in fact, be a profitable strategy. Rather, many reconciliation initiatives in the private sector are not bound by policies that apply to government departments and organizations. For example, there is no economy-wide law or policy about Indigenous procurement. A corporation commits to Indigenous employment and training goals because this commitment is perceived to be morally, socially, or economically good.

Corporate initiatives typically set reconciliation goals around employment, operational spending, partnerships, and community initiatives. Consumer initiatives often seek to highlight Indigenous business and to educate about the risks of some businesses falsely advertising as being Indigenous-owned.





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### 3. The Economic Baselines of the Natural Resources and Infrastructure Sectors in Canada

There are clear opportunities for First Nations to build economic prosperity through the growth of Canada's natural resources and infrastructure sectors. The outputs of these sectors are not only large, but they can be incredibly significant for parts of Canada.

The growth of the natural resources sector is important to First Nations for economic opportunities, but also for the potential environmental impacts of resource extraction. Many natural resource projects will have employment opportunities, including opportunities to develop Indigenous-led initiatives in land and water use, and environmental monitoring. First Nations can also find revenue and profit-sharing opportunities from agreements or partnerships that recognize the use of traditional territories for resource extraction.

More than any other sector, the infrastructure sector is foundational to economic reconciliation with First Nations. Many First Nations communities lack critical infrastructure systems, such as housing, or their infrastructure systems need to be upgraded to address population growth, climate change, and other factors. The AFN and the Conference Board of Canada calculated in 2023 that the First Nations infrastructure gap is around \$350 billion and continues to grow, due to a lack of meaningful investment over the last several budget cycles, the cost to close the gap now exceeds \$400 billion. The infrastructure gap is a result of insufficient funding for the capital, operational, and maintenance costs of projects in:

- On-reserve housing
- Schools and teacherages
- Drinking water and wastewater treatment
- Connectivity
- Climate adaptation
- Accessibility
- Road access

The Auditor General of Canada March 2024 report flagged serious concern over how there is no strategy in place to address the infrastructure gap. The infrastructure sector in Canada is also connected to First Nations economic reconciliation through land and resource use on traditional territories. New major infrastructure projects in Canada are highly likely to require free, prior, and informed consent (FPIC) from Indigenous communities that have the right to exercise inherent and treaty rights through Section 35 of the Canadian constitution. Government spending on these projects will also create procurement opportunities for Indigenous businesses. The passage of Bill C-5 *Building Canada Act* has further reinforced public-sector obligations to advance reconciliation through policy, funding, and procurement decisions. As a result, this aims to streamline economic development and infrastructure projects in Canada. However, Indigenous Nations across Canada have raised concerns that the legislation undermines Indigenous rights and sovereignty. The Bill allows projects to be “fast-tracked”, proceeding without proper agreements, revenue-sharing, or respect for Treaty relationships.



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This section presents a baseline assessment of the current structure and historical trends of Canada's natural resource and infrastructure sectors. It begins with an overview of the labour market, detailing total employment, the balance between employed and self-employed workers, and average employment income across the sectors. The assessment then characterizes the size of each sector through multiple indicators, including the number of active businesses, total industry revenues, expenses, and net income, as well as contributions to GDP and real value added. Federal government participation is quantified through available data on tax revenues, public spending, and investments. Finally, the baseline includes estimates of First Nations economic impact, including labour force participation, employment income, and industry activity.

Overall, economic baselines are important to understanding the characteristics of the sectors that First Nations contribute to through employment, investment, and spending. Section 4 will build from this current section by forecasting the employment, output, GDP, and labour income of the natural resource and infrastructure sectors. These forecasts will estimate total amounts across Canada and by region, as well as estimate First Nations employment and contributions to GDP.

### 3.1 Natural Resources

Regional employment trends in Canada's natural resources sector from 2016 to 2023 help explain the sector's evolution across key dimensions. This subsection analyses trends in the labour market, including total employment, worker status, and income levels in the natural resources sectors. It evaluates industry size through business counts, revenues, expenses, and contributions to GDP. It also examines federal government participation and First Nations involvement in the sector. Each analysis is presented using regionally disaggregated data to highlight differences in sectoral performance and workforce dynamics across the country.

#### 3.1.1 Labour Market

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This subsection analyzes employment trends in Canada's natural resources sector between 2016 and 2023, focusing on employment growth and regional variation. Over this period, sector employment rose from 713,290 to 776,830 jobs, representing an 8.9% increase nationwide. Growth was not uniform across regions, with notable differences in both scale and pace of expansion.

- Alberta recorded the largest employment gain, adding 31,290 jobs (+17.0%), reflecting strong energy-sector activity and resource development.
- Quebec and British Columbia also experienced substantial increases of +11.6% and +9.6%, respectively, supported by mining and forestry growth.
- The Territories posted the highest relative increase (+40.3%), though this reflects growth from a comparatively small employment base.
- Atlantic provinces and Ontario saw moderate gains, with employment rising by +8.0% and +6.3%, respectively.
- The Prairies experienced a decline of -7.4%, indicating regional contraction or labour movement toward other provinces or sectors.



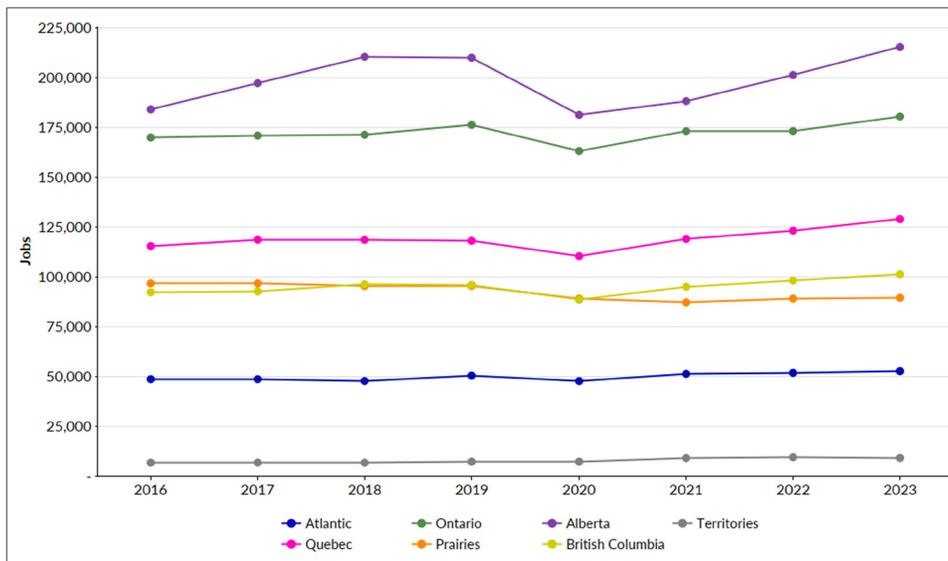
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Overall, national employment in the natural resources sector grew steadily between 2016 and 2023, driven primarily by expansion in energy-producing and resource-dependent regions. The pattern of growth suggests that northern and western provinces continue to anchor Canada’s resource economy, while slower gains in central regions reflect more diversified economic structures.

**Figure 9: Total Industry Employment, Natural Resources, Regional (2016-2023)**

Source: (Statistics Canada, 2025)



**Table 1: Total Industry Employment, Natural Resources, Regional (2016 - 2023)**

Region	2016	2020	2023	2016-2023 Change (#)	2016-2023 Change (%)
Atlantic	48,650	47,575	52,400	3,890	8.0%
Quebec	115,440	110,340	128,805	13,365	11.6%
Ontario	169,840	163,120	180,580	10,740	6.3%
Prairies	96,525	89,200	89,335	-7,190	-7.4%
Alberta	184,000	181,270	215,290	31,290	17.0%
British Columbia	92,350	88,325	101,180	8,830	9.6%
Territories	6,485	7,115	9,100	2,615	40.3%
<b>Canada</b>	<b>713,290</b>	<b>686,945</b>	<b>776,830</b>	<b>63,540</b>	<b>8.9%</b>

Source: (Statistics Canada, 2025)



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**Figure 10** and **Table 2** show employment trends in Canada's natural resources sector between 2016 and 2023. The figure and table measure total paid employments, paid workers jobs and self-employed jobs. Over this period, total employment increased by +8.9%, rising from 713,290 to 776,830 jobs. The number of employees grew by +21%, while self-employment declined -29.2%, indicating a structural shift toward wage-based employment and larger, more formalized operations within the sector.

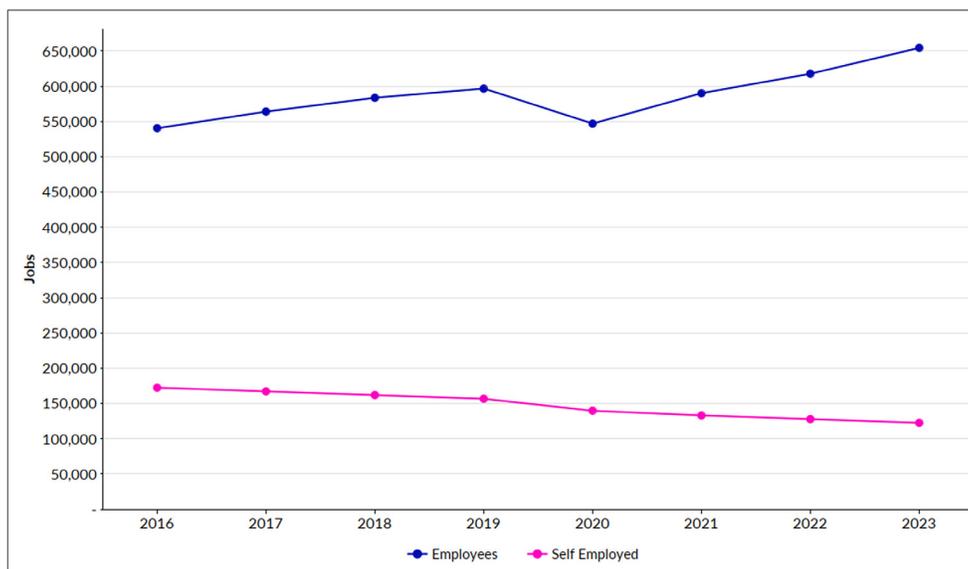
Regional trends include:

- Alberta accounted for the largest absolute growth in employees, adding 40,570 jobs (+27.1%).
- Ontario and Quebec had strong employee gains of +20.1% and +17.7%, respectively, consistent with diversification in energy, forestry, and mining activities.
- British Columbia recorded steady employee growth (+17.1%), reflecting sustained demand natural resources related services.
- The Prairies saw employee growth of 18.9% but a sharp decline in self-employment (-43.7%).
- Atlantic Canada has modest overall growth (+8.0%) with a 16.1% rise in employees, partially offset by a -28.2% decline in self-employment.
- The Territories experienced the strongest relative employee growth (+42.3%).
- Across all regions, self-employment declined, most notably in Alberta, Ontario, and the Prairies.

These results highlight a clear shift toward employer-driven job creation within the natural resources sector. Growth has been concentrated in energy-intensive provinces and northern regions, while independent and self-employed roles have contracted.

**Figure 10: Employment by Worker Status, Natural Resources, Canada, 2016-2023**

Source: (Statistics Canada, 2025)





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## Economic Reconciliation Report

**Table 2: Employment by Worker Status, Natural Resources, Regional (2016 - 2023)**

Region	Worker Status	2016	2020	2023	2016-2023 Change (#)	2016-2023 Change (%)
Atlantic	Employee	39,725	39,955	46,130	6,405	16.1%
	Self-Employed	8,925	7,620	6,410	-2,515	-28.2%
	<b>Total</b>	<b>48,650</b>	<b>47,575</b>	<b>52,540</b>	<b>3,890</b>	<b>8.0%</b>
Quebec	Employee	95,580	93,545	112,485	16,905	17.7%
	Self-Employed	19,860	16,795	16,320	-3,540	-17.8%
	<b>Total</b>	<b>115,440</b>	<b>110,340</b>	<b>128,805</b>	<b>13,365</b>	<b>11.6%</b>
Ontario	Employee	119,500	123,285	143,540	24,040	20.1%
	Self-Employed	50,340	39,835	37,040	-13,300	-26.4%
	<b>Total</b>	<b>169,840</b>	<b>163,120</b>	<b>180,580</b>	<b>10,740</b>	<b>6.3%</b>
Prairies	Employee	55,925	56,425	66,480	10,555	18.9%
	Self-Employed	40,600	32,775	22,855	-17,745	-43.7%
	<b>Total</b>	<b>96,525</b>	<b>89,200</b>	<b>89,335</b>	<b>-7,190</b>	<b>-7.4%</b>
Alberta	Employee	149,670	153,200	190,240	40,570	27.1%
	Self-Employed	34,330	28,070	25,050	-9,280	-27.0%
	<b>Total</b>	<b>184,000</b>	<b>181,270</b>	<b>215,290</b>	<b>31,290</b>	<b>17.0%</b>
British Columbia	Employee	74,300	73,535	87,010	12,710	17.1%
	Self-Employed	18,050	14,790	14,170	-3,880	-21.5%
	<b>Total</b>	<b>92,350</b>	<b>88,325</b>	<b>101,180</b>	<b>8,830</b>	<b>9.6%</b>
Territories	Employee	6,210	6,860	8,835	2,625	42.3%
	Self-Employed	275	255	265	-10	-3.6%
	<b>Total</b>	<b>6,485</b>	<b>7,115</b>	<b>9,100</b>	<b>2,615</b>	<b>40.3%</b>
Canada	Employee	540,910	546,805	654,720	113,810	21.0%
	Self-Employed	172,380	140,140	122,110	-50,270	-29.2%
	<b>Total</b>	<b>713,290</b>	<b>686,945</b>	<b>776,830</b>	<b>63,540</b>	<b>8.9%</b>

Source: (Statistics Canada, 2025)



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**Figure 11** and **Table 3** present the employee, self-employed, and total average employment income for the population across Canada's infrastructure sector between 2016 and 2023. Nationally, average income rose by +28.8%, from \$79,411 to \$102,257, reflecting strong wage growth across both employees and self-employed workers. Employee incomes increased by +18.5%, while self-employed earnings grew by +21.6%, suggesting consistent sectoral gains despite variations in regional performance.

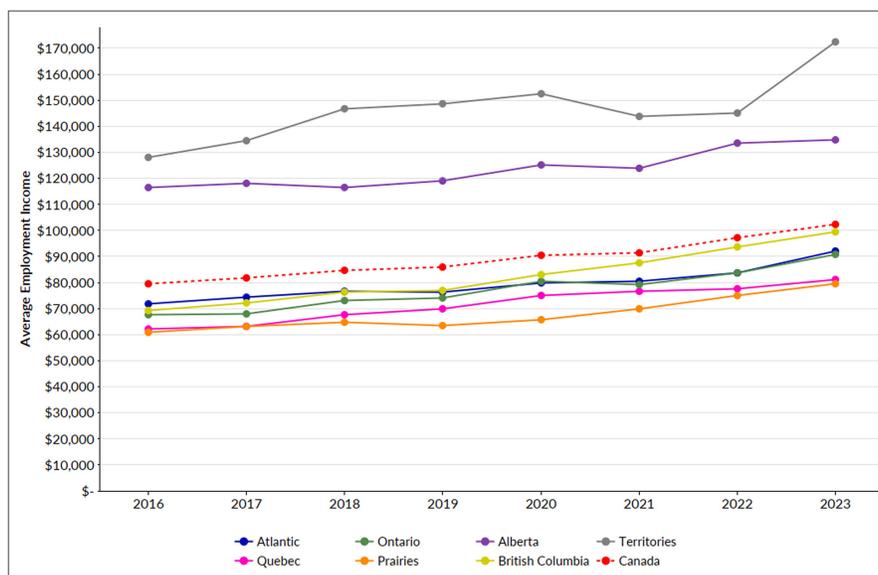
Regional trends include:

- British Columbia recorded the strongest overall income growth (+43.6%), with the average wage rising to \$99,328 in 2023.
- The Territories posted the highest absolute incomes, reaching \$172,422 (+34.6%), which may reflect the high-cost, specialized work environments and large-scale northern development projects.
- Ontario saw income growth of 34.4%, with average earnings increasing to \$90,889.
- Quebec and the Prairies both experienced moderate gains of roughly 31%, with average incomes reaching \$81,237 and \$79,527, respectively.
- Atlantic Canada recorded a 28.6% increase, bringing average income to \$92,178, indicating wage improvements despite limited employment growth.
- Alberta maintained one of the highest average incomes (\$134,671) in the country but exhibited slower growth (+15.7%).

Overall, average incomes in the natural resources sector have risen across all regions. Growth has been most pronounced in British Columbia, Ontario, and the Territories.

**Figure 11: Average Employment Income, Natural Resources, Regional (2016-2023)<sup>4</sup>**

Source: (Statistics Canada, 2025)



<sup>4</sup> Average employment income is presented for individuals classified as employees and does not include individuals who are self-employed.



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**Table 3: Average Employment Income, Natural Resources, Regional (2016 - 2023)**

Region	Worker Status	2016	2020	2023	2016-2023 Change (#)	2016-2023 Change (%)
Atlantic	Employee	\$81,926	\$88,917	\$100,627	\$18,701	22.8%
	Self-Employed	\$26,006	\$32,922	\$31,380	\$5,374	20.7%
	<b>Total</b>	<b>\$71,667</b>	<b>\$79,948</b>	<b>\$92,178</b>	<b>\$20,512</b>	<b>28.6%</b>
Quebec	Employee	\$71,700	\$85,253	\$90,433	\$18,733	26.1%
	Self-Employed	\$15,660	\$18,374	\$17,858	\$2,199	14.0%
	<b>Total</b>	<b>\$62,059</b>	<b>\$75,073</b>	<b>\$81,237</b>	<b>\$19,178</b>	<b>30.9%</b>
Ontario	Employee	\$89,558	\$100,536	\$108,562	\$19,004	21.2%
	Self-Employed	\$15,589	\$18,152	\$22,404	\$6,816	43.7%
	<b>Total</b>	<b>\$67,633</b>	<b>\$80,417</b>	<b>\$90,889</b>	<b>\$23,256</b>	<b>34.4%</b>
Prairies	Employee	\$89,421	\$90,331	\$98,388	\$8,967	10.0%
	Self-Employed	\$21,234	\$23,564	\$24,665	\$3,431	16.2%
	<b>Total</b>	<b>\$60,740</b>	<b>\$65,798</b>	<b>\$79,527</b>	<b>\$18,787</b>	<b>30.9%</b>
Alberta	Employee	\$138,488	\$143,797	\$149,375	\$10,886	7.9%
	Self-Employed	\$20,348	\$23,232	\$23,010	\$2,661	13.1%
	<b>Total</b>	<b>\$116,446</b>	<b>\$125,127</b>	<b>\$134,671</b>	<b>\$18,225</b>	<b>15.7%</b>
British Columbia	Employee	\$82,473	\$95,467	\$112,697	\$30,224	36.6%
	Self-Employed	\$14,290	\$20,440	\$17,242	\$2,951	20.7%
	<b>Total</b>	<b>\$69,146</b>	<b>\$82,904</b>	<b>\$99,328</b>	<b>\$30,182</b>	<b>43.6%</b>
Territories	Employee	\$132,505	\$157,027	\$176,526	\$44,021	33.2%
	Self-Employed	\$28,436	\$30,910	\$35,596	\$7,160	25.2%
	<b>Total</b>	<b>\$128,091</b>	<b>\$152,507</b>	<b>\$172,422</b>	<b>\$44,330</b>	<b>34.6%</b>
Canada	Employee	\$98,887	\$108,167	\$117,180	\$18,294	18.5%
	Self-Employed	\$18,298	\$21,530	\$22,245	\$3,946	21.6%
	<b>Total</b>	<b>\$79,411</b>	<b>\$90,493</b>	<b>\$102,257</b>	<b>\$22,847</b>	<b>28.8%</b>

Source: (Statistics Canada, 2025)



### 3.1.2 Industry Size

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This subsection evaluates the size and financial performance of the natural resources sector across Canada between 2016 and 2023. It covers changes in business counts by firm size, industry revenue and expenses, and contributions to GDP.

**Figure 12** and **Table 4** present the number of natural resource-related businesses in Canada by firm size between 2016 and 2023. Over this period, the total number of firms declined by 2.1%, from 59,218 to 57,958. Nationally, small and medium-sized businesses decreased by 2.2% and 1.8%, respectively, while the number of large firms grew by 11.1%, suggesting consolidation among major operators and a reduction in smaller enterprise activity.

Regional trends include:

- Quebec was the only province to record growth across all business size categories, with total firms increasing +7.5%, including a +7.4% rise in small firms, +24.2% growth in medium-sized firms, and a +33.3% increase in large firms.
- Ontario remained stable overall with a slight reduction in small firms (-0.5%) but notable expansion among medium-sized businesses (+23.0%).
- The Prairies had an overall increase in businesses of +3.2%.
- Alberta experienced the largest overall decline (-13.4%), with reductions across all size categories, reflecting industry restructuring and capital investment slowdowns.
- British Columbia saw a decline of 8.5%, primarily among small businesses (-8.6%), while the number of large firms increased slightly (+23.1%).
- Atlantic Canada experienced a modest contraction (-2.7%), with small declines across all business sizes.
- The Territories recorded the largest percentage decrease (-18.2%), driven by a reduction in medium firms (-68.8%).
- Nationally, medium-sized firms grew by +9.7% across Canada, and large firms by +9.4% while there was a decline in small businesses of +3.1%.

Overall, the natural resources sector saw slight national contraction in business counts between 2016 and 2023, reflecting slower new business formation. Growth in Quebec contrasts with widespread declines elsewhere, suggesting that while central provinces are maintaining stable or expanding resource activity, other regions, particularly Alberta and British Columbia, are adjusting to lower levels of investment and project turnover.

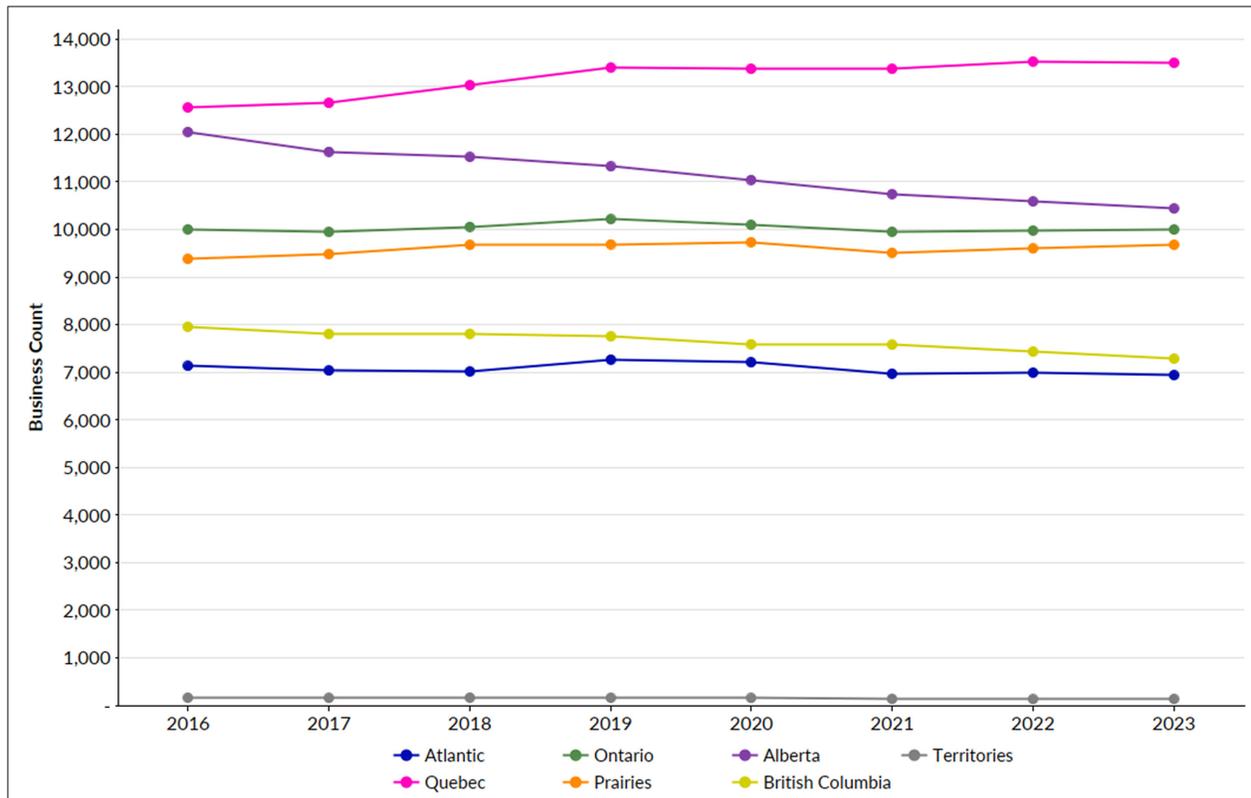


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Figure 12: Industry Business Count, Natural Resources, Regional (2016-2023)

Source: (Statistics Canada, 2025)





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**Table 4: Industry Business Count, Natural Resources, Regional (2016-2023)<sup>5</sup>**

Region	Business Count	2016	2020	2023	2016-2023 Change (#)	2016-2023 Change (%)
Atlantic	Small	7,062	7,134	6,876	-186	-2.6%
	Medium	62	64	55	-7	-11.3%
	Large	5	7	5	-	0.0%
	<b>Total</b>	<b>7,129</b>	<b>7,205</b>	<b>6,936</b>	<b>-193</b>	<b>-2.7%</b>
Quebec	Small	12,448	13,241	13,363	915	7.4%
	Medium	91	110	113	22	24.2%
	Large	21	22	28	7	33.3%
	<b>Total</b>	<b>12,560</b>	<b>13,373</b>	<b>13,504</b>	<b>944</b>	<b>7.5%</b>
Ontario	Small	9,807	9,886	9,758	-49	-0.5%
	Medium	165	171	203	38	23.0%
	Large	31	37	36	5	16.1%
	<b>Total</b>	<b>10,003</b>	<b>10,094</b>	<b>9,997</b>	<b>-6</b>	<b>-0.1%</b>
Prairies	Small	9,293	9,671	9,615	322	3.5%
	Medium	67	44	44	-23	-34.3%
	Large	19	19	18	-1	-5.3%
	<b>Total</b>	<b>9,379</b>	<b>9,734</b>	<b>9,677</b>	<b>298</b>	<b>3.2%</b>
Alberta	Small	11,760	10,785	10,189	-1,571	-13.4%
	Medium	244	225	210	-34	-13.9%
	Large	46	35	39	-7	-15.2%
	<b>Total</b>	<b>12,050</b>	<b>11,045</b>	<b>10,438</b>	<b>-1,612</b>	<b>-13.4%</b>
British Columbia	Small	7,827	7,475	7,150	-677	-8.6%
	Medium	119	108	116	-3	-2.5%
	Large	13	12	16	3	23.1%
	<b>Total</b>	<b>7,959</b>	<b>7,595</b>	<b>7,282</b>	<b>-677</b>	<b>-8.5%</b>
Territories	Small	141	135	118	-23	-16.3%
	Medium	16	10	5	-11	-68.8%
	Large	2	5	7	5	250.0%
	<b>Total</b>	<b>159</b>	<b>150</b>	<b>130</b>	<b>-29</b>	<b>-18.2%</b>
Canada	Small	58,324	58,319	57,063	-1,261	-2.2%
	Medium	759	734	745	-14	-1.8%
	Large	135	138	150	15	11.1%
	<b>Total</b>	<b>59,218</b>	<b>59,191</b>	<b>57,958</b>	<b>-1,260</b>	<b>-2.1%</b>

Source: (Statistics Canada, 2025)

<sup>5</sup> Small: 1 to 99 employees; Medium: 100 to 499 employees; Large: 500+ employees



### 3.1.3 Income and GDP

**Figure 13** shows how the natural resources sector experienced strong financial recovery and significant profitability growth from 2020 to 2023. This recovery was driven by rebounding commodity prices, expanded energy production, and increased export demand following early pandemic declines. **Figure 14** and **Table 5** demonstrate how growth was concentrated in Alberta, Ontario, British Columbia, and the Prairies, reflecting the combined effects of higher commodity prices, post-pandemic production recovery, and export market strength.

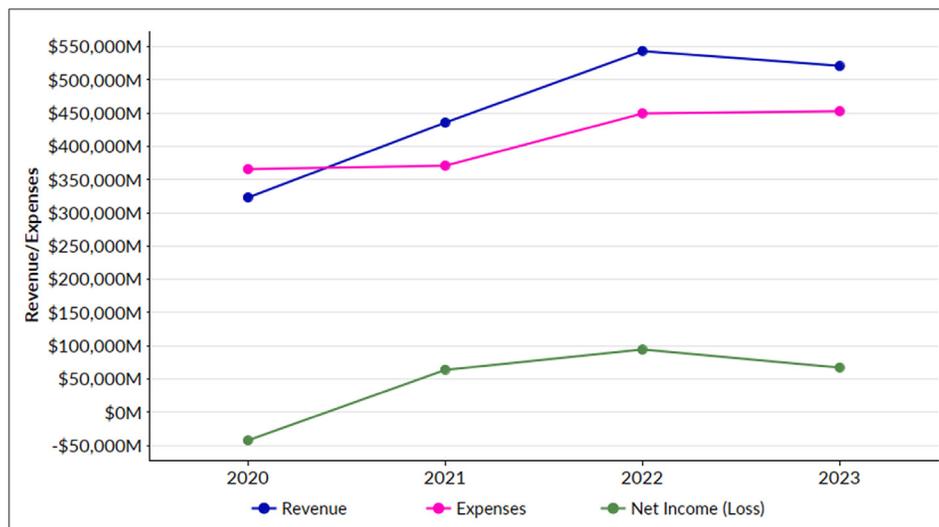
Regional highlights include:

- Nationally, total industry revenue increased by +38%, while expenses rose by +19%, resulting in gains in net income. Between 2020 and 2023, there was a +163% increase in net income from a loss of -\$42.6 billion to \$67.4 billion, respectively.
- Alberta’s revenues increased by +40% to \$246.6 billion and net income by \$79.5 billion.
- Ontario, Quebec, and the Prairies all recorded substantial financial gains, with revenues up +22%, +30%, and +38%, respectively. Ontario’s net income rose from a small loss (-\$252 million) to a profit of \$5.3 billion, while the Prairies and Quebec achieved net income growth of +69% and +24%, respectively.
- British Columbia saw strong revenue growth (+40%) and a shift from a -\$4.6 billion loss to a \$4.8 billion profit.
- Atlantic Canada experienced declines, with revenues and expenses falling by over -200% and net income contracting by -854%, indicating volatility and reduced production activity.

Despite volatility in smaller regions, the sector’s national performance underscores its pivotal role in Canada’s post-2020 economic rebound.

**Figure 13: Industry Income Statement, Natural Resources, Canada (2020 - 2023) (in millions of dollars)**

Source: (Statistics Canada, 2025)



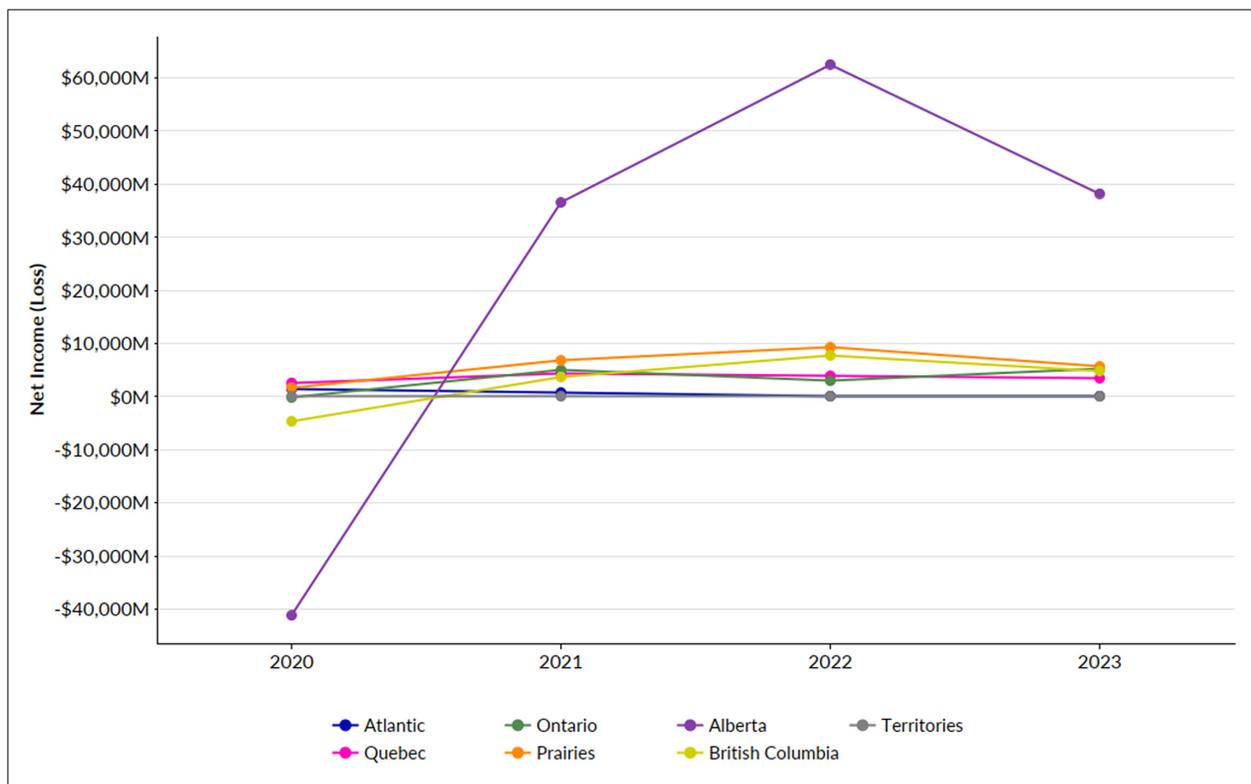


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Figure 14: Industry Net Income (Loss), Natural Resources, Regional (2020 - 2023) (in millions of dollars)

Source: (Statistics Canada, 2025)





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**Table 5: Industry Revenue, Expenses, and Net Income (Loss), Natural Resources, Regional (2020 - 2023)**  
(in millions of dollars)

Region	Revenue/Expense	2020	2023	2020-2023 Change (#)	2020-2023 Change (%)
Atlantic	Revenue	\$9,849	\$2,763	\$-7,086	-256%
	Expenses	\$8,484	\$2,620	\$-5,864	-224%
	<b>Net Income (Loss)</b>	<b>\$1,365</b>	<b>\$143</b>	<b>\$-1,222</b>	<b>-854%</b>
Quebec	Revenue	\$29,124	\$41,753	\$12,629	30%
	Expenses	\$26,471	\$38,262	\$11,791	31%
	<b>Net Income (Loss)</b>	<b>\$2,653</b>	<b>\$3,491</b>	<b>\$838</b>	<b>24%</b>
Ontario	Revenue	\$53,063	\$68,379	\$15,317	22%
	Expenses	\$53,315	\$63,105	\$9,790	16%
	<b>Net Income (Loss)</b>	<b>\$-252</b>	<b>\$5,274</b>	<b>\$5,527</b>	<b>105%</b>
Prairies	Revenue	\$25,074	\$40,216	\$15,142	38%
	Expenses	\$23,321	\$34,609	\$11,288	33%
	<b>Net Income (Loss)</b>	<b>\$1,753</b>	<b>\$5,607</b>	<b>\$3,854</b>	<b>69%</b>
Alberta	Revenue	\$146,852	\$246,620	\$99,768	40%
	Expenses	\$188,104	\$208,365	\$20,261	10%
	<b>Net Income (Loss)</b>	<b>\$-41,252</b>	<b>\$38,255</b>	<b>\$79,507</b>	<b>208%</b>
British Columbia	Revenue	\$25,818	\$43,276	\$17,458	40%
	Expenses	\$30,446	\$38,474	\$8,028	21%
	<b>Net Income (Loss)</b>	<b>\$-4,628</b>	<b>\$4,802</b>	<b>\$9,430</b>	<b>196%</b>
Territories	Revenue	\$77	\$9	\$-68	-752%
	Expenses	\$72	\$8	\$-64	-801%
	<b>Net Income (Loss)</b>	<b>\$5</b>	<b>\$1</b>	<b>\$-4</b>	<b>-354%</b>
Canada	Revenue	\$323,081	\$520,314	\$197,232	38%
	Expenses	\$365,704	\$452,895	\$87,191	19%
	<b>Net Income (Loss)</b>	<b>\$-42,623</b>	<b>\$67,419</b>	<b>\$110,042</b>	<b>163%</b>

Source: (Statistics Canada, 2025)



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**Figure 15** and **Table 6** summarize the natural resources sector’s contribution to Canada’s GDP between 2016 and 2023. Over this period, the sector’s total GDP rose from \$183.6 billion to \$204.8 billion, an increase of +11.5%. Growth was moderate but consistent, reflecting recovery from earlier commodity market fluctuations and renewed investment in energy and resource production following 2020.

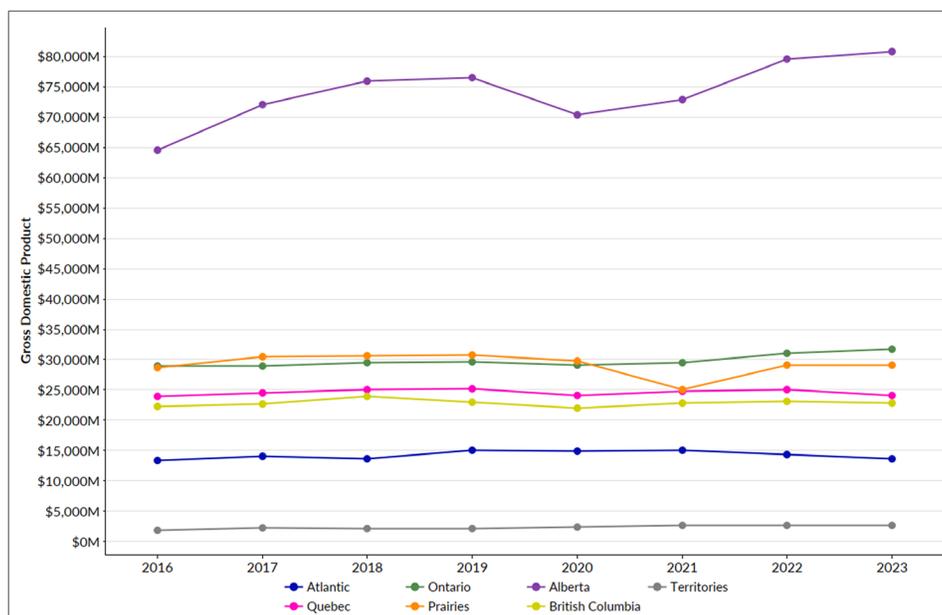
Industry highlights include:

- Alberta was a significant contributor to national GDP, accounting for \$80.8 billion in 2023, an increase of +25.1% since 2016.
- Ontario increased by +9.4%, with GDP rising to \$31.7 billion.
- British Columbia experienced modest growth (+2.6%), reaching \$22.8 billion.
- Atlantic Canada grew by +1.7%, with GDP increasing to \$13.6 billion, indicating stable but mature production levels.
- Quebec saw minimal change (+0.8%), maintaining GDP of around \$24.1 billion, suggesting consistent but slow output across the industry.
- The Prairies had modest gains reaching \$29.1 billion in 2023, a +1.4% increase from 2016.
- The Territories posted the strongest relative increase (+43.9%), with GDP rising to \$2.65 billion.

Overall, the natural resources sector remains a cornerstone of Canada’s economy, contributing more than \$200 billion to GDP in 2023. While Alberta continues to lead national output, growth has been relatively subdued across most other regions. Strong performance in the Territories and steady gains in Ontario highlight potential diversification and new investment opportunities.

**Figure 15: Gross Domestic Product, Natural Resources, Regional (2016-2023) (in millions of dollars)**

Source: (Statistics Canada, 2025)





**Table 6: Gross Domestic Product, Natural Resources, Regional (2016-2023) (in millions of dollars)**

Region	2016	2020	2023	2016-2023 Change (#)	2016-2023 Change (%)
Atlantic	\$13,367.3	\$14,905.9	\$13,600.6	\$233.3	1.7%
Quebec	\$23,913.3	\$24,161.7	\$24,107.1	\$193.8	0.8%
Ontario	\$28,972.2	\$29,090.8	\$31,689.3	\$2,717.1	9.4%
Prairies	\$28,688.3	\$29,726.4	\$29,096.5	\$408.2	1.4%
Alberta	\$64,572.6	\$70,314.2	\$80,806.3	\$16,233.7	25.1%
British Columbia	\$22,260.7	\$22,014.8	\$22,841.2	\$580.5	2.6%
Territories	\$1,843.9	\$2,347.5	\$2,653.8	\$809.9	43.9%
Canada	\$183,618.3	\$192,561.3	\$204,794.8	\$21,176.5	11.5%

Source: (Statistics Canada, 2025)

### 3.1.4 Federal Government Participation

The federal government’s participation in Canada’s natural resource sector is reflected in its ongoing budget allocations to key departments and agencies responsible for energy, minerals, and regulatory oversight.

**Figure 16** and **Table 7** present the federal budget allocations between the 2022-23 and 2024-25 fiscal years for Natural Resources Canada as well as the other agencies for which the Minister of Energy and Natural Resources is responsible. The agencies included are as follows:

- Atomic Energy of Canada Limited
- Canada Energy Regulator
- Canadian Nuclear Safety Commission
- Northern Pipeline Agency

Between 2022-23 and 2024-25, the percent of the total Federal budget allocated to agencies supporting natural resources rose from 1% in 2022-24 to 1.7% in 2024-25.

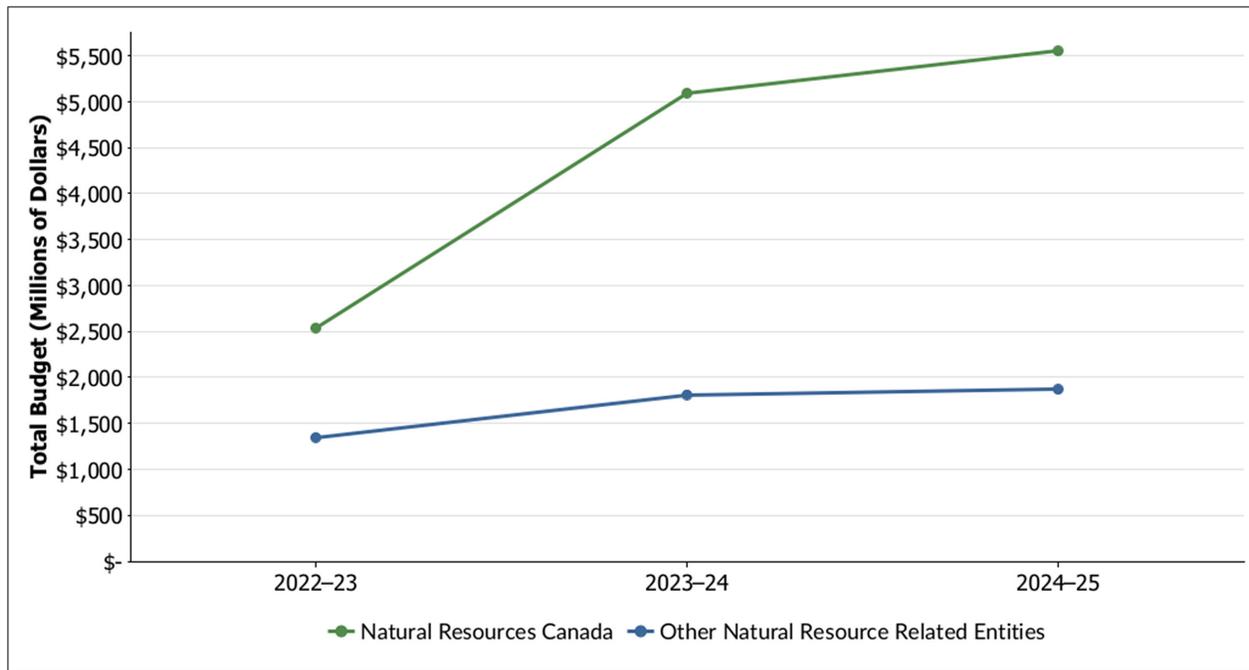
- The increase represents a budget increase of approximately \$3 billion for Natural Resources Canada and \$52 million for other natural resources related entities.
- Between 2022-23 and 2024-25 the total budget allocated to natural resources increased +90.8% (\$3.5 billion).

The data demonstrates an ongoing and increasing commitment from the federal government to advance regulatory capacity, innovation, and infrastructure within the natural resources sector.



**Figure 16: Federal Government Department Budgetary Allocations, Natural Resources, (FY2022/23 - FY2024/25) (In millions of dollars)**

Source: (Avaanz Ltd., 2025) (Statistics Canada, 2025)



**Table 7: Federal Government Department Budgetary Allocations, Natural Resources, (FY2022/23 - FY2024/25) (In millions of dollars)**

Department	2022-23	2023-24	2024-25	2022/23 - 2024/25 Increase (%)	% of Total Federal Budget (2024/25)
Natural Resources Canada	\$13,367.3	\$14,905.9	\$13,600.6	\$233.3	1.7%
Other Natural Resource Related Entities	\$23,913.3	\$24,161.7	\$24,107.1	\$193.8	0.8%
<b>Total - Natural Resources Sector</b>	<b>\$28,972.2</b>	<b>\$29,090.8</b>	<b>\$31,689.3</b>	<b>\$2,717.1</b>	<b>9.4%</b>

Source: (Avaanz Ltd., 2025) (Statistics Canada, 2025)



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Canadian Classification of Functions of Government (CCOFOG) is a standardized framework developed by Statistics Canada to classify government expenditures by their intended function or purpose, rather than by department or program. Natural resource-related government spending is identified through the following CCOFOG categories:

- 7042 - Agriculture, forestry, fishing, and hunting
- 7043 - Fuel and energy
- 7044 - Mining, manufacturing, and construction (mining portion only)
- 7054 - Protection of biodiversity and landscape

These functions quantify the government's financial commitment to the sector and capture spending on resource development, regulation, and environmental management, providing a clear indication of federal investment in the sector.

**Figure 17, Figure 18, and Table 8** present the consolidated Canadian general government and the consolidated provincial-territorial and local governments spending within natural resource related CCOFOG categories. The Canadian general government represents the entire Canadian public sector, excluding government business enterprises, and is a consolidation of all levels of government. The provincial-territorial and local government includes provincial and territorial governments, health and social service institutions, universities and colleges, municipalities and other local public administrations, and school boards.

National trends:

- The consolidated Canadian general government spending nearly doubled between 2016 and 2023, increasing from \$15.7 billion to \$30.6 billion in 2023, respectively.
- This growth is indicative of heightened public interest in natural resource projects, driven by clean energy transitions, biodiversity protection, and support for sustainable economies.

Provincial trends:

- Ontario saw the largest absolute and relative increase, rising from \$2.8 billion to \$8.8 billion, a 210% increase.
- British Columbia also experienced substantial growth, from \$816 million to \$2.3 billion, a 185% increase.
- The Prairies doubled their spending, from \$1.6 billion to \$3.4 billion, an increase of 108%.
- Alberta, with its strong oil and gas sector, spent \$7.2 billion in 2023, up 48.2% from 2016, though growth was more moderate than in other regions.
- The Atlantic saw a 70.6% increase between 2016 and 2023, reaching \$916 million in 2023.
- Quebec experienced more modest growth in comparison to the other regions with a 33.3% increase over the period.
- Territorial governments increased spending by 57.7%, reflecting growing investments in northern resource management and environmental protection.



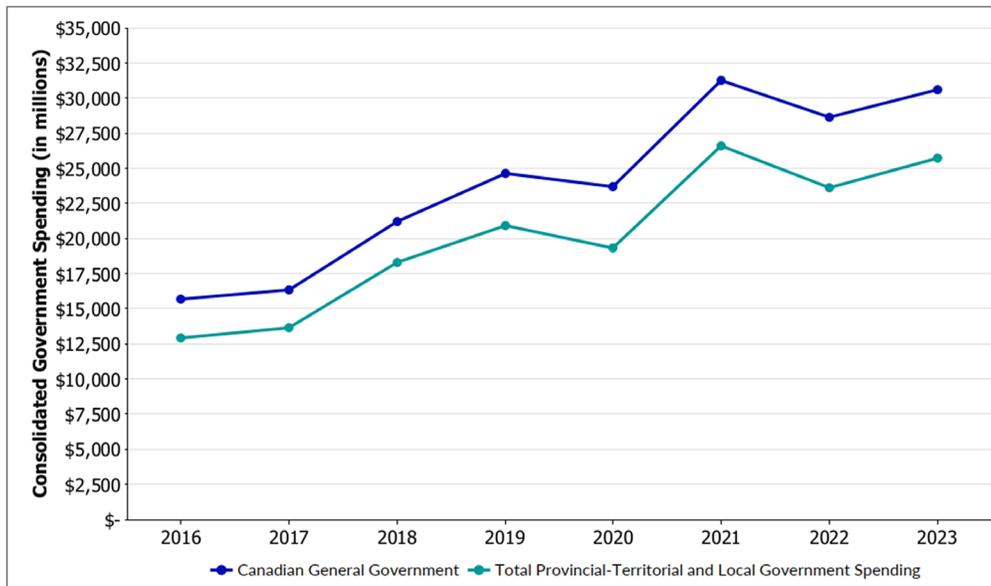
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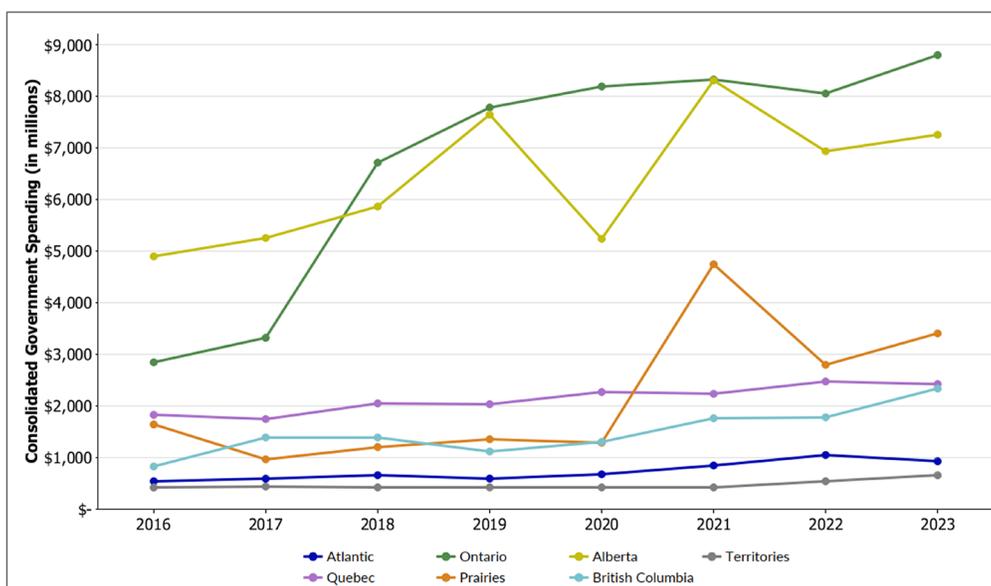
**Figure 17: Consolidated Canadian General Government Spending, Natural Resources (2016-2023)**  
(in millions of dollars)

Source: (Statistics Canada, 2024)



**Figure 18: Consolidated Provincial-Territorial and Local Government Spending, Natural Resources (2016-2023)** (in millions of dollars)

Source: (Statistics Canada, 2024)





**Table 8: Consolidated Government Spending, Natural Resources (2016-2023) (in millions of dollars)**

Public Sector Component		2016	2023	% Change (2016-2023)	% of Total General Government Spending (2023)
<b>Canadian General Government Spending</b>		\$15,673	\$30,573	95.1%	1.41%
<b>Provincial-Territorial and Local Government Spending</b>	Atlantic	\$537	\$916	70.6%	0.04%
	Quebec	\$1,816	\$2,421	33.3%	0.11%
	Ontario	\$2,837	\$8,791	209.9%	0.41%
	Prairies	\$1,633	\$3,396	108.0%	0.16%
	Alberta	\$4,889	\$7,246	48.2%	0.33%
	British Columbia	\$816	\$2,327	185.2%	0.11%
	Territories	\$409	\$645	57.7%	0.03%
	<b>Total</b>	<b>\$12,937</b>	<b>\$25,742</b>	<b>99.0%</b>	<b>1.19%</b>

Source: (Statistics Canada, 2024)

**Figure 19** and **Table 9** present the provincial income tax, federal tax, and total tax received by the Canadian government from the natural resources sector between 2016 and 2023.

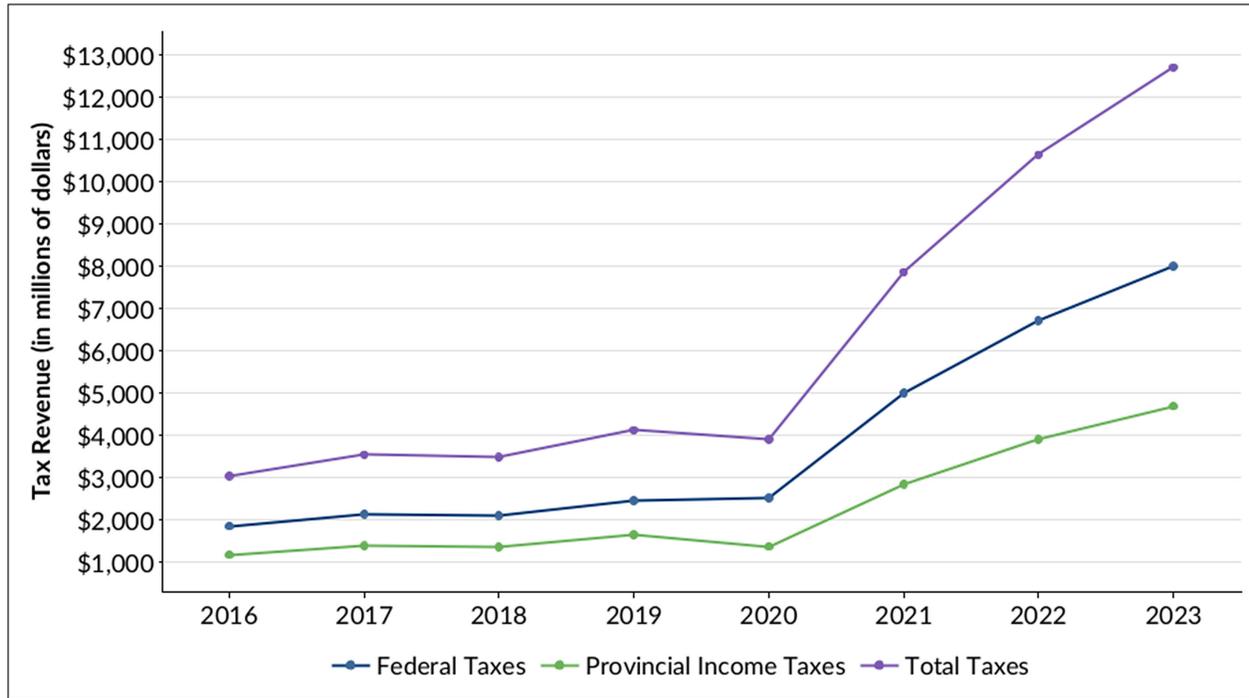
Between 2016 and 2023, tax revenues from the natural resources industry demonstrated significant growth, particularly after 2020. Federal taxes and provincial income taxes both remained relatively stable from 2016 to 2020, with only slight increases. However, starting in 2021, tax revenues from both levels surged, contributing to a sharp increase in total tax revenue. Total tax revenue nearly doubled from approximately \$4 billion in 2020 to approximately \$12.7 billion in 2023. This trend indicates a strong post-2020 recovery and expansion in the natural resources sector, likely driven by increased production and higher commodity prices. The data reflects a tripling of total tax revenue over the eight-year period, signaling strong economic recovery and growth within the natural resources industry.

It should be noted that in 2020, content and industry grouping changes were made and as a result, the comparability of the estimates with those prior to 2020 reference year is impacted (Statistics Canada, 2025).



**Figure 19: Tax Revenue Received, Natural Resources, Canada (2016-2023) (in millions of dollars)<sup>6,7</sup>**

Source: (Statistics Canada, 2025)



**Table 9: Tax Revenue Received, Natural Resources, Canada (2016, 2020, 2023) (in millions of dollars)**

Tax Area	2016	2020	2023	2022-2023 Change (#)	2020- 2023 Change (%)
Provincial Income Tax	\$1,187	\$1,384	\$4,701	\$3,317	239.7%
Federal Tax	\$1,869	\$2,526	\$8,002	\$5,476	216.8%
<b>Total Taxes</b>	<b>\$3,053</b>	<b>\$3,911</b>	<b>\$12,703</b>	<b>\$8,792</b>	<b>224.8%</b>

Source: (Statistics Canada, 2025)

**6** Data may change from year to year for several reasons, including economic growth or decline, merger and acquisition activity, industry reclassifications, changes in methodology, and revisions to the data.

**7** Beginning with the 2019 reference year, the financial and taxation statistics does not include federal and provincial government business enterprises (GBEs).



### 3.1.5 First Nation Participation

This section provides a regional overview of First Nations participation in the natural resources sector, focusing on employment levels, income, and economic contribution. It highlights variations across provinces and territories and offers a baseline for understanding First Nations engagement in natural resources-related industries.

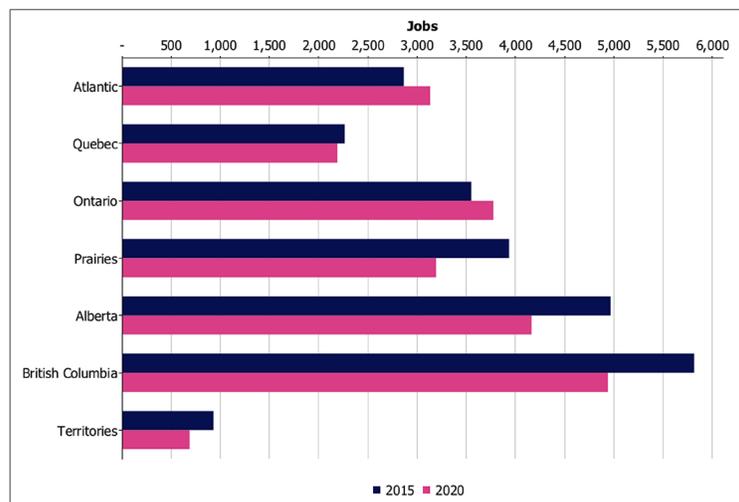
**Figure 20** and **Table 10** presents the number of First Nations employment income recipients in the natural resources sector by region between 2015 and 2020. Nationally, the number of recipients declined by 9.3%, from 24,335 in 2015 to 22,068 in 2020. This overall reduction reflects the cyclical nature of resource-based employment, fluctuating commodity markets, and the impacts of economic slowdowns during the latter half of the period.

- Ontario (+6.3%) and the Atlantic region (+9.4%) were the only jurisdictions to record net increases in employment, supported by ongoing forestry, mining, and energy projects with sustained Indigenous participation.
- Quebec (-3.4%) saw a modest decline, while larger reductions occurred in British Columbia (-15.1%), Alberta (-16.2%), and the Prairies (-18.9%).
- The Territories (-25.9%) experienced the steepest proportional decline, consistent with the smaller labour pool and high dependency on project activity.

Despite the national decrease, employment in the natural resources sector remains a critical source of income and skills development for many First Nations. The results emphasize the sensitivity of Indigenous employment to market and project cycles, underscoring the importance of continued efforts to diversify opportunities across both traditional and emerging resource industries. This snapshot provides a baseline for monitoring future growth and informing policies that advance meaningful Indigenous inclusion in resource-based employment.

**Figure 20: First Nation Employment, Natural Resources, Regional (2015 and 2020)<sup>8</sup>**

Source: (Statistics Canada, 2023)



<sup>8</sup> Numbers are based on individuals with a reported highest certificate, diploma, or degree.



**Table 10: First Nation Employment, Natural Resources, Regional (2015 and 2020)**

Region	2015	2020	2015-2020 Change (#)	2015-2020 Change (%)
Atlantic	2,865	3,133	268	9.4%
Quebec	2,265	2,188	-77	-3.4%
Ontario	3,550	3,773	223	6.3%
Prairies	3,935	3,192	-743	-18.9%
Alberta	4,965	4,162	-803	-16.2%
British Columbia	5,815	4,937	-878	-15.1%
Territories	930	689	-241	-25.9%
Canada	24,335	22,068	-2,267	-9.3%

Source: (Statistics Canada, 2023)

**Figure 21** and **Table 11** displays average employment income for First Nations workers employed in the natural resources sector between 2015 and 2020. Nationally, average income increased by 9.1%, rising from \$56,917 to \$62,099 over the five-year period. This growth suggests modest real gains in compensation despite sectoral employment declines, indicating that higher-value or specialized positions may have offset overall reductions in workforce size.

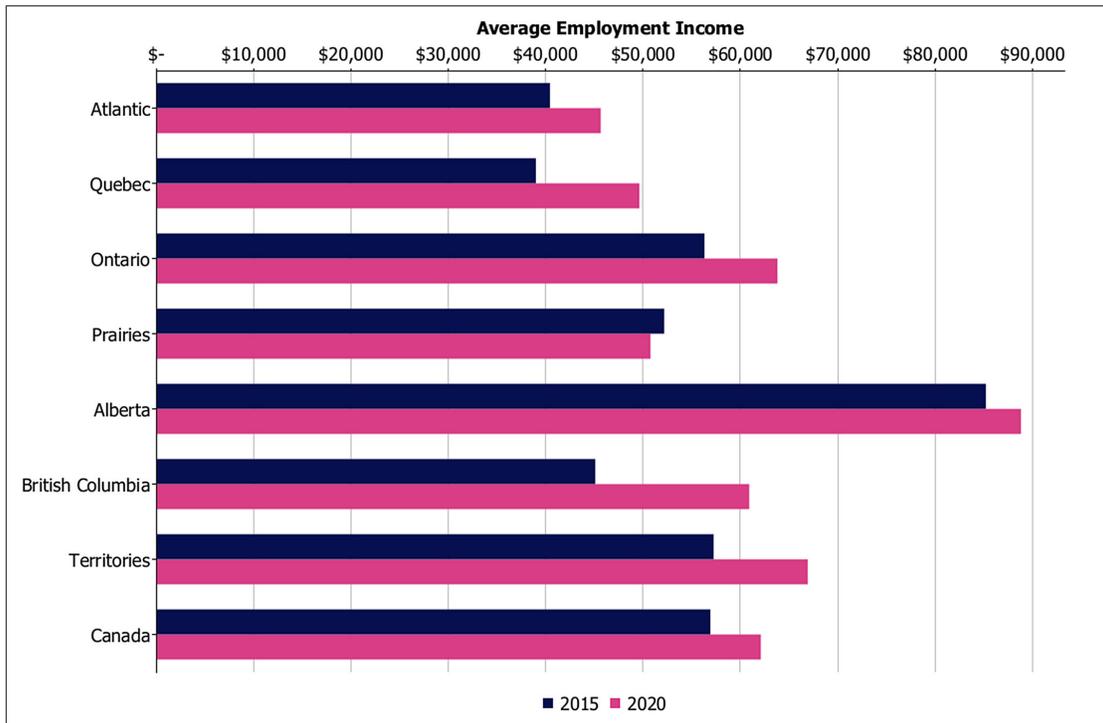
- The largest proportional increases occurred in British Columbia (+35.0%), Quebec (+27.3%), and the Territories (+16.9%), indicating a growing concentration of higher-wage opportunities in skilled trades, technical roles, and resource operations requiring advanced training.
- Ontario (+13.3%) and the Atlantic region (+12.9%) also saw meaningful wage growth, aligning with activity in subsectors such as mining support, forestry, and renewable energy development.
- In contrast, the Prairies (-2.7%) experienced a slight decline, while Alberta (+4.2%) recorded modest gains, suggesting uneven recovery and continued volatility in resource investment cycles following the 2015-2016 commodity downturn.

Overall, the data indicate a gradual upward trend in average earnings among employed First Nations individuals within the natural resources sector, even as total employment levels declined. This pattern suggests a structural shift toward fewer but higher-skilled and better-compensated positions.



**Figure 21: First Nation Average Employment Income, Natural Resources, Regional (2015 and 2020)**

Source: (Statistics Canada, 2023)



**Table 11: First Nation Average Employment Income, Natural Resources, Regional (2015 and 2020)**

Region	2015	2020	2015-2020 Change (#)	2015-2020 Change (%)
Atlantic	\$40,442	\$45,655	\$5,213	12.9%
Quebec	\$38,998	\$49,632	\$10,633	27.3%
Ontario	\$56,314	\$63,801	\$7,487	13.3%
Prairies	\$52,171	\$50,773	\$-1,398	-2.7%
Alberta	\$85,204	\$88,806	\$3,602	4.2%
British Columbia	\$45,102	\$60,904	\$15,802	35.0%
Territories	\$57,254	\$66,922	\$9,668	16.9%
Canada	\$56,917	\$62,099	\$5,182	9.1%

Source: (Statistics Canada, 2023)



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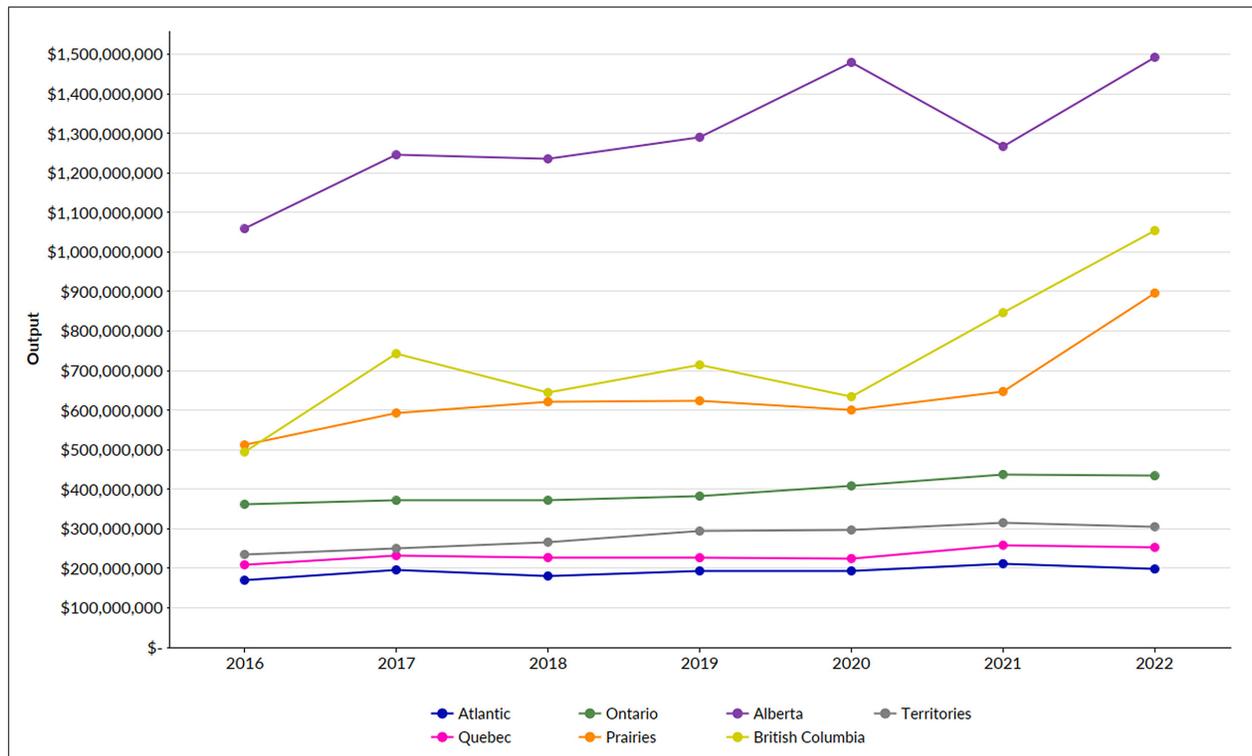
**Figure 22** and **Table 12** present industry output attributed to First Nations participation in the natural resources sector, measured regionally between 2016 and 2022. During this period, economic output grew significantly across all regions, with a national increase of 52.35%, rising from roughly \$3 billion to more than \$4.6 billion.

Key regional highlights include:

- Industry output in Alberta is the majority share of all First Nation industry output in the natural resources sector. The economic output in Alberta was 34% of all First Nations economic output in the natural resources sector in 2016. In 2021 it was 32%.
- British Columbia (+112.91%) and the Prairies (+75.35%) had very strong growths in economic output.
- Quebec and Ontario grew by approximately 20%, while the Territories (+29.9%) and Atlantic Canada (+16.6%) also saw steady increases, albeit from smaller starting values.

**Figure 22: First Nation Industry Output, Natural Resources, Regional (2016-2022)**

Source: (Statistics Canada, 2025)





**Table 12: First Nation Industry Output, Natural Resources, Regional (2016-2022) (in thousands of dollars)**

Region	2016	2020	2022	2016-2022 Change (#)	2016-2022 Change (%)
Atlantic	\$169,452	\$193,731	\$197,558	\$28.1	16.59%
Quebec	\$208,962	\$225,611	\$252,507	\$43.5	20.84%
Ontario	\$362,029	\$408,094	\$433,245	\$71.2	19.67%
Prairies	\$511,294	\$600,358	\$896,545	\$385.3	75.35%
Alberta	\$1,058,376	\$1,479,584	\$1,492,563	\$434.2	41.02%
British Columbia	\$495,037	\$634,545	\$1,054,000	\$559.0	112.91%
Territories	\$235,522	\$296,566	\$305,994	\$70.5	29.92%
Canada	\$3,040,672	\$3,838,489	\$4,632,412	\$1,591,740.00	52.35%

Source: (Statistics Canada, 2025)

**Figure 23** and **Table 13** present gross domestic income (GDI)<sup>9</sup> attributed to First Nations participation in the natural resources sector, measured regionally between 2016 and 2022. During this period, GDI contributions grew significantly across all regions, with a national increase of 52.1%, rising from \$1.6 billion to nearly \$2.5 billion in 2022.

Key regional highlights include:

- British Columbia experienced the most substantial growth, more than doubling its attributed GDI (+165.38%).
- The Prairies (+52.98%) and Alberta (+42.09%) also recorded strong gains, aligning with expanded Indigenous engagement in mining and energy-related activities.
- Quebec and Ontario grew by approximately 20%, while the Territories (+44.6%) and Atlantic Canada (+21.07%) saw steady increases, albeit from smaller starting values.

Overall, this upward trend underscores the growing role of First Nations communities in the sector's economic output and reflects increasing opportunities for Indigenous participation in resource development.

<sup>9</sup> Gross Domestic Income (GDI) is a measure of the total income earned by all sectors of an economy, including wages, corporate profits, and taxes minus subsidies. GDI is conceptually equivalent to Gross Domestic Product (GDP), which measures the total value of finished goods and services -- in theory, all purchases of finished goods and services fuel streams of income for governments (taxes), businesses (revenues) and consumers (wages).



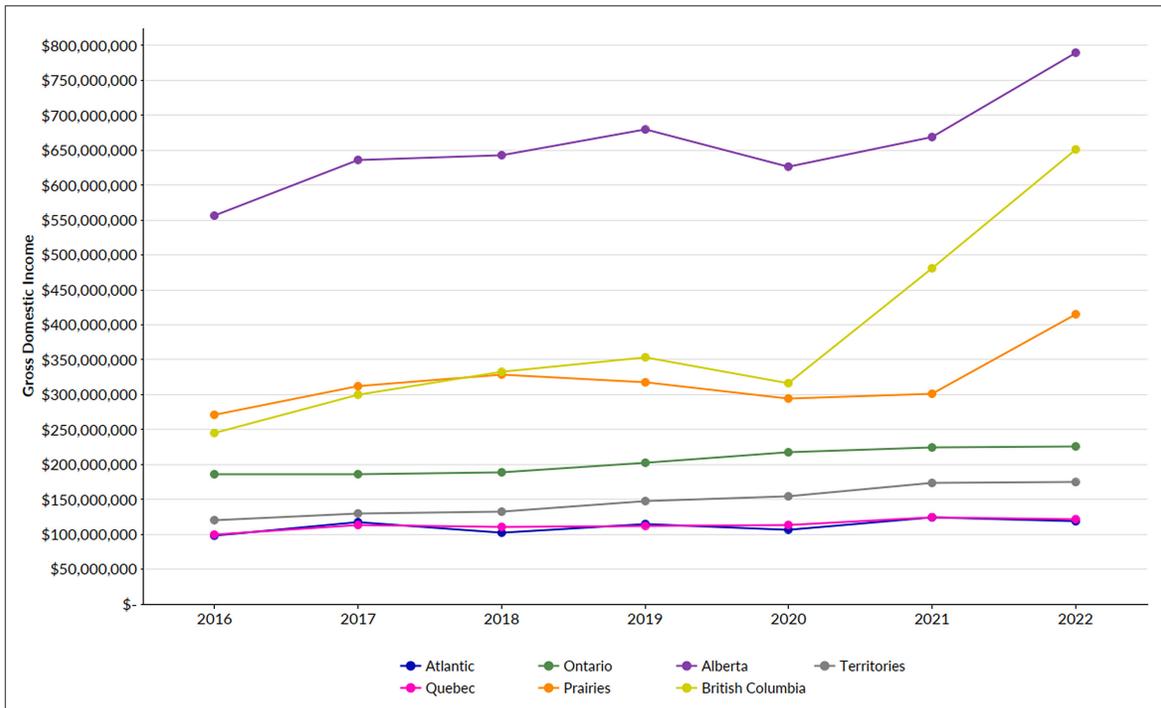
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**Figure 23: Gross Domestic Income Attributed to First Nations, Natural Resources, Regional (2016-2022)**

Source: (Statistics Canada, 2025)



**Table 13: Gross Domestic Income Attributed to First Nations, Natural Resources, Regional (2016-2022)**  
(in thousands of dollars)

Region	2016	2020	2022	2016-2022 Change (#)	2016-2022 Change (%)
Atlantic	\$97,835	\$107,004	\$118,449	\$20,614	21.07%
Quebec	\$99,457	\$113,709	\$122,015	\$22,558	22.68%
Ontario	\$186,084	\$217,170	\$226,007	\$39,923	21.45%
Prairies	\$271,350	\$294,771	\$415,114	\$143,764	52.98%
Alberta	\$555,949	\$626,764	\$789,941	\$233,992	42.09%
British Columbia	\$245,506	\$316,859	\$651,517	\$406,011	165.38%
Territories	\$120,510	\$154,150	\$174,254	\$53,744	44.60%
Canada	\$1,576,691	\$1,830,427	\$2,497,297	\$920,606	58.39%

Source: (Statistics Canada, 2025)



## 3.2 Infrastructure

This section captures regional employment trends in Canada's infrastructure sector from 2016 to 2023, providing a comprehensive overview of the sector's evolution across key dimensions. It describes the labour market, including total employment, worker status, and income levels; evaluates industry size through business counts, revenues, expenses, and contributions to GDP; and examines federal government participation and First Nations involvement in the sector. The analysis is presented using regionally disaggregated data to highlight differences in sectoral performance and workforce dynamics across the country.

### 3.2.1 Labour Market

---

This subsection examines employment trends in Canada's infrastructure sector between 2016 and 2023, emphasizing national growth patterns and regional variation. Over this period, sector employment expanded significantly, from 1.44 million to 1.80 million positions, representing a 25.6% increase nationally. This growth reflects strong public and private investment in construction, utilities, and transportation-related industries following 2016.

Key regional observations include:

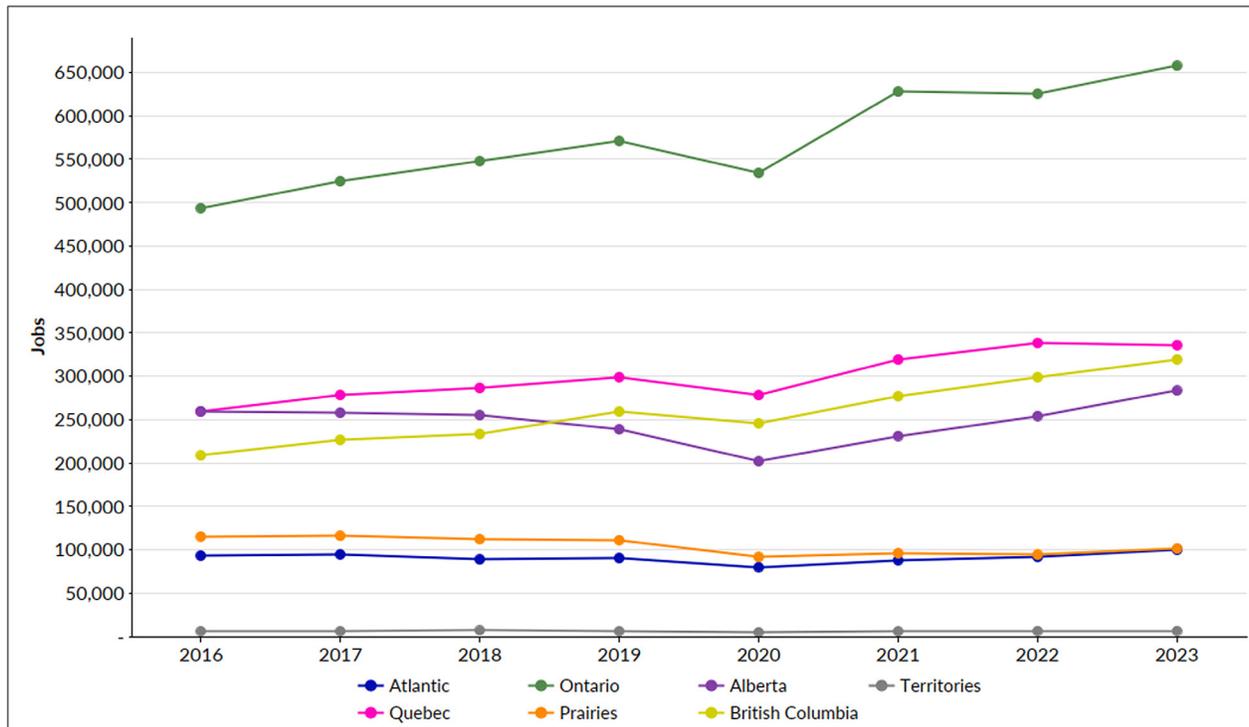
- Ontario experienced the largest absolute gain, adding 163,645 jobs (+33.1%), driven by sustained infrastructure spending in transit, housing, and energy projects.
- British Columbia recorded the fastest growth rate (+53.4%), with employment rising by 111,280 positions, reflecting robust construction activity and large-scale public infrastructure programs.
- Quebec saw strong and steady expansion with a total increase of 76,150 jobs (+29.3%).
- Alberta saw an increase of +9.0% over the observation period, regaining some of the ground lost during the 2020 downturn, while the Territories grew modestly by +8.6%.
- The Atlantic region expanded by +7.2%, reflecting gradual recovery and renewed investment in regional infrastructure.
- The Prairies experienced a decline of -12.3%, suggesting project slowdowns and limited new capital investment in that region.

Overall, national infrastructure employment grew substantially between 2016 and 2023. **Figure 24** and **Table 14** show total industry employments of regional infrastructure sectors from 2016 to 2023. Positive employment growth was most significant in Ontario, British Columbia, and Quebec, while slower performance in the Prairies points to ongoing regional disparities in construction and infrastructure investment.



**Figure 24: Total Industry Employment, Infrastructure, Regional (2016-2023)**

Source: (Statistics Canada, 2025)



**Table 14: Total Industry Employment, Infrastructure, Regional (2016 - 2023)**

Region	2016	2020	2023	2016-2023 Change (#)	2016-2023 Change (%)
Atlantic	93,050	80,295	99,775	6,725	7.2%
Quebec	259,725	277,910	335,875	76,150	29.3%
Ontario	493,875	534,095	657,520	163,645	33.1%
Prairies	115,420	91,325	101,170	-14,250	-12.3%
Alberta	259,770	201,735	283,220	23,450	9.0%
British Columbia	208,305	245,745	319,585	111,280	53.4%
Territories	6,120	5,065	6,645	525	8.6%
Canada	1,436,265	1,436,170	1,803,790	367,525	25.6%

Source: (Statistics Canada, 2025)



# Sparking Prosperity

## Economic Reconciliation Report

**Figure 25** and **Table 15** present employment trends in Canada’s infrastructure sector by worker status between 2016 and 2023. Over this period, the number of employees increased by +30.4%, while self-employment declined by -7.5%. This marks a structural shift toward wage-based employment, reflecting greater institutional and corporate involvement in infrastructure delivery, particularly across construction, utilities, and waste management industries.

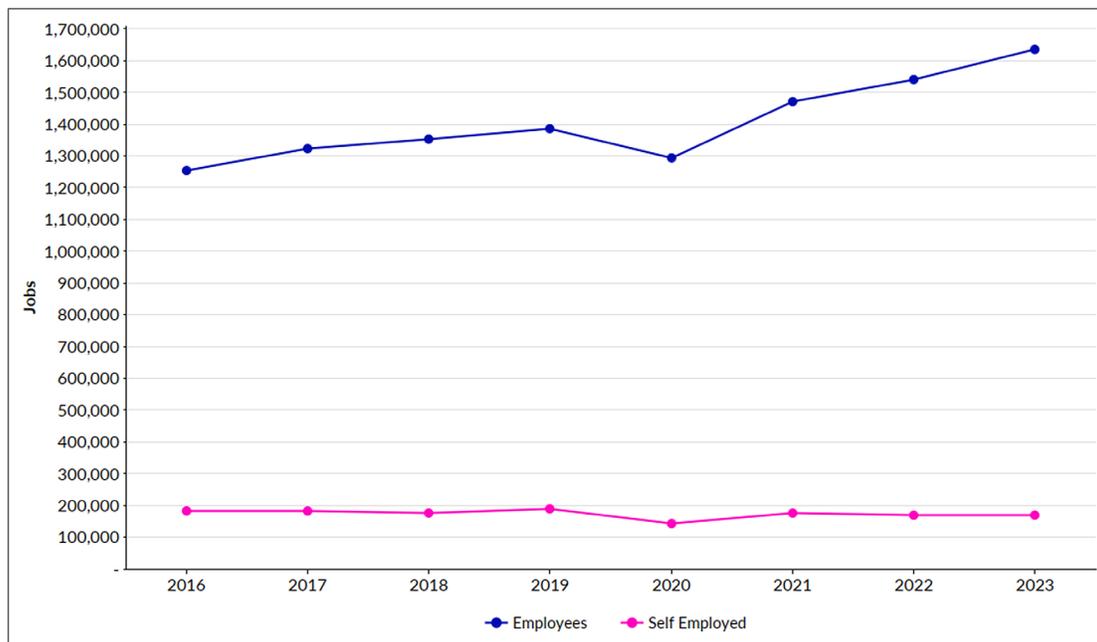
Key regional observations include:

- Ontario and British Columbia led employment growth among wage-based workers, with increases of +41.2% and +64.3%, respectively.
- Quebec recorded strong growth in employee positions (+33.1%), while Alberta experienced more moderate gains (+10.9%) as the sector recovered from earlier contractions.
- The Prairies were the only region where both employees (-10.5%) and self-employed workers (-25.5%) declined.
- Atlantic Canada and the Territories were exceptions to the national self-employment with increases of +14.1% and +13.7%, respectively.

These trends suggest a shift toward employer-based job creation within the infrastructure sector, coinciding with major public investments and large private projects. While overall employment expanded, entrepreneurial and self-employed participation became more regionally concentrated, growing modestly in smaller or more remote regions but contracting in major urban centres.

**Figure 25: Employment by Worker Status, Infrastructure, Canada, (2016 - 2023)**

Source: (Statistics Canada, 2025)





## Assembly of First Nations

# Sparking Prosperity

## Economic Reconciliation Report

**Table 15: Employment by Worker Status, Infrastructure, Regional (2016 - 2023)**

Region	Worker Status	2016	2020	2023	2016-2023 Change (#)	2016-2023 Change (%)
Atlantic	Employee	85,080	72,980	90,680	5,600	6.6%
	Self-Employed	7,970	7,315	9,095	1,125	14.1%
	<b>Total</b>	<b>93,050</b>	<b>80,295</b>	<b>99,775</b>	<b>6,725</b>	<b>7.2%</b>
Quebec	Employee	235,635	259,760	313,575	77,940	33.1%
	Self-Employed	24,090	18,150	22,300	-1,790	-7.4%
	<b>Total</b>	<b>259,725</b>	<b>277,910</b>	<b>335,875</b>	<b>76,150</b>	<b>29.3%</b>
Ontario	Employee	411,130	472,010	580,450	169,320	41.2%
	Self-Employed	82,745	62,085	77,070	-5,675	-6.9%
	<b>Total</b>	<b>493,875</b>	<b>534,095</b>	<b>657,520</b>	<b>163,645</b>	<b>33.1%</b>
Prairies	Employee	101,285	80,430	90,640	-10,645	-10.5%
	Self-Employed	14,135	10,895	10,530	-3,605	-25.5%
	<b>Total</b>	<b>115,420</b>	<b>91,325</b>	<b>101,170</b>	<b>-14,250</b>	<b>-12.3%</b>
Alberta	Employee	239,990	186,385	266,065	26,075	10.9%
	Self-Employed	19,780	15,350	17,155	-2,625	-13.3%
	<b>Total</b>	<b>259,770</b>	<b>201,735</b>	<b>283,220</b>	<b>23,450</b>	<b>9.0%</b>
British Columbia	Employee	174,925	218,675	287,440	112,515	64.3%
	Self-Employed	33,380	27,070	32,145	-1,235	-3.7%
	<b>Total</b>	<b>208,305</b>	<b>245,745</b>	<b>319,585</b>	<b>111,280</b>	<b>53.4%</b>
Territories	Employee	5,390	4,225	5,815	425	7.9%
	Self-Employed	730	840	830	100	13.7%
	<b>Total</b>	<b>6,120</b>	<b>5,065</b>	<b>6,645</b>	<b>525</b>	<b>8.6%</b>
Canada	Employee	1,253,435	1,294,465	1,634,665	381,230	30.4%
	Self-Employed	182,830	141,705	169,125	-13,705	-7.5%
	<b>Total</b>	<b>1,436,265</b>	<b>1,436,170</b>	<b>1,803,790</b>	<b>367,525</b>	<b>25.6%</b>

Source: (Statistics Canada, 2025)



# Assembly of First Nations

## Sparking Prosperity

### Economic Reconciliation Report

**Figure 26** and **Table 16** present the employee, self-employed, and total average employment income for the population across Canada's infrastructure sector between 2016 and 2023. Nationally, average income increased by +21.8%, reaching \$88,179 in 2023. Both employees and self-employed workers experienced wage growth, though at slightly different rates, +21.2% for employees and +20.6% for the self-employed, indicating broad-based income gains across the sector.

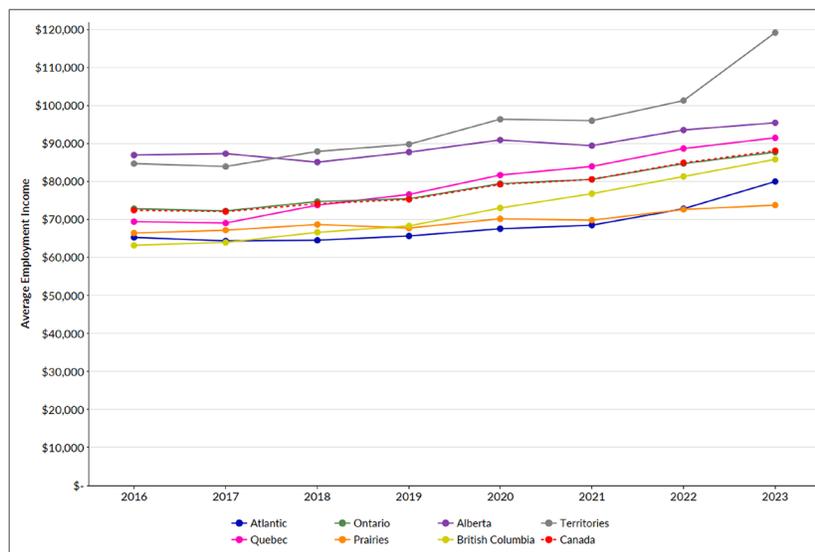
Regional trends include:

- British Columbia recorded the strongest overall income growth, with average earnings rising +35.9% to \$85,798, reflecting substantial wage gains in the industry.
- The Territories saw average income increases of +40.7% to reach \$119,133, the highest in the country, over the observation period.
- Quebec has wage growth of +31.7%, with average income reaching \$91,452.
- Atlantic Canada saw a +22.7% increase, with average income rising to \$80,037, suggesting improving wage conditions across the region.
- Ontario recorded more moderate growth (+20.3%) but maintained a high average income of \$87,656.
- The Prairies experienced the slowest growth (+11.1%), with average income reaching \$73,805, suggesting slower recovery in regional project activity.
- Alberta, while maintaining one of the highest average incomes at \$95,475, saw limited growth (+9.9%), indicating relative wage stagnation compared to other provinces.
- Ontario led all regions in absolute income growth, increasing by \$25,042, or 35.75%, to reach \$95,098 in 2023.

Overall, the data points to steady national wage growth within the infrastructure sector, with stronger increases in British Columbia, the Territories, and Quebec, and slower gains in Alberta and the Prairies. The trend reflects both rising demand for skilled labour and the influence of large-scale infrastructure projects concentrated in higher-growth regions.

**Figure 26: Average Employment Income, Infrastructure, Regional (2016-2023)**

Source: (Statistics Canada, 2025)





# Sparking Prosperity

## Economic Reconciliation Report

**Table 16: Average Employment Income, Infrastructure, Regional (2016 - 2023)**

Region	Worker Status	2016	2020	2023	2016-2023 Change (#)	2016-2023 Change (%)
Atlantic	Employee	\$66,264	\$68,446	\$81,028	\$14,764	22.3%
	Self-Employed	\$54,074	\$59,691	\$70,152	\$16,078	29.7%
	<b>Total</b>	<b>\$65,220</b>	<b>\$67,648</b>	<b>\$80,037</b>	<b>\$14,817</b>	<b>22.7%</b>
Quebec	Employee	\$70,377	\$82,908	\$92,507	\$22,130	31.4%
	Self-Employed	\$59,996	\$64,408	\$76,620	\$16,624	27.7%
	<b>Total</b>	<b>\$69,414</b>	<b>\$81,700</b>	<b>\$91,452</b>	<b>\$22,038</b>	<b>31.7%</b>
Ontario	Employee	\$74,837	\$81,328	\$89,228	\$14,391	19.2%
	Self-Employed	\$63,188	\$64,800	\$75,818	\$12,630	20.0%
	<b>Total</b>	<b>\$72,885</b>	<b>\$79,407</b>	<b>\$87,656</b>	<b>\$14,771</b>	<b>20.3%</b>
Prairies	Employee	\$67,144	\$71,073	\$74,536	\$7,392	11.0%
	Self-Employed	\$61,457	\$62,981	\$67,511	\$6,054	9.9%
	<b>Total</b>	<b>\$66,447</b>	<b>\$70,107</b>	<b>\$73,805</b>	<b>\$7,357</b>	<b>11.1%</b>
Alberta	Employee	\$87,914	\$92,458	\$96,545	\$8,632	9.8%
	Self-Employed	\$74,685	\$72,364	\$78,870	\$4,186	5.6%
	<b>Total</b>	<b>\$86,906</b>	<b>\$90,929</b>	<b>\$95,475</b>	<b>\$8,569</b>	<b>9.9%</b>
British Columbia	Employee	\$63,879	\$73,987	\$86,747	\$22,868	35.8%
	Self-Employed	\$59,293	\$65,510	\$77,309	\$18,017	30.4%
	<b>Total</b>	<b>\$63,144</b>	<b>\$73,053</b>	<b>\$85,798</b>	<b>\$22,653</b>	<b>35.9%</b>
Territories	Employee	\$87,292	\$101,529	\$124,135	\$36,843	42.2%
	Self-Employed	\$65,263	\$70,106	\$84,092	\$18,829	28.9%
	<b>Total</b>	<b>\$84,664</b>	<b>\$96,318</b>	<b>\$119,133</b>	<b>\$34,469</b>	<b>40.7%</b>
Canada	Employee	\$73,823	\$80,710	\$89,466	\$15,643	21.2%
	Self-Employed	\$62,777	\$65,333	\$75,735	\$12,958	20.6%
	<b>Total</b>	<b>\$72,417</b>	<b>\$79,193</b>	<b>\$88,179</b>	<b>\$15,762</b>	<b>21.8%</b>

Source: (Statistics Canada, 2025)



# Assembly of First Nations

## Sparking Prosperity

### Economic Reconciliation Report

### 3.2.2 Industry Size

This subsection evaluates the size and financial performance of the infrastructure sector across Canada between 2016 and 2023. It covers changes in business counts by firm size, industry revenue and expenses, and contributions to GDP.

**Figure 27** and **Table 17** present the number of businesses within Canada’s infrastructure sector between 2016 and 2023 by size. Over this period, the total number of infrastructure-related businesses in Canada rose by +9.0%, from 147,866 to 161,196. Growth was driven primarily by increases among small (+9.0%) and medium-sized (+14.6%) firms, while the number of large firms declined by -21.2%, suggesting a gradual shift toward smaller, more flexible enterprise structures.

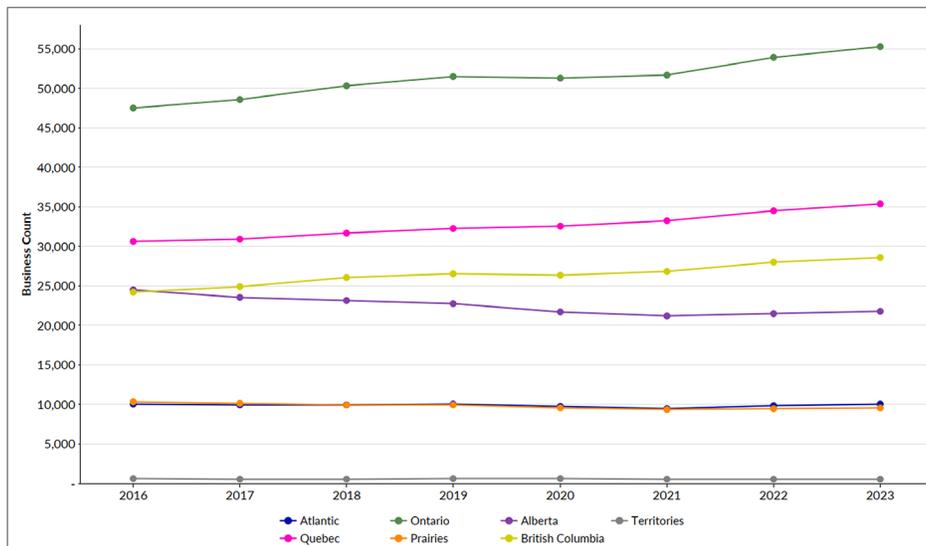
Regional business trends include:

- Nationally, small, and medium-sized businesses increased by +9% and +14.6%, respectively, while the number of large firms contracted from 132 to 104 (-21.2%).
- Quebec, Ontario, and British Columbia led growth in small business formation, with increases of +15.1%, +16.3%, and +18.5%, respectively.
- Medium-sized firms grew most notably in Quebec (+55.1%) and Ontario (+29.9%).
- Alberta and the Prairies experienced declines across all business sizes.
- The Territories and Atlantic Canada showed modest activity with mixed trends and smaller absolute changes.

Overall, the infrastructure sector has expanded in total business counts, but with a notable shift toward smaller and mid-sized firms. The data suggest that growth in infrastructure activity has been supported by a broader entrepreneurial base in central and western provinces, while regional contractions in Alberta and the Prairies point to market adjustments and project slowdowns following earlier investment peaks.

**Figure 27: Industry Business Count, Infrastructure, Regional (2016-2023)**

Source: (Statistics Canada, 2025)





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## Economic Reconciliation Report

**Table 17: Industry Business Count by Business Size, Infrastructure, Regional (2016-2023)**

Region	Business Count	2016	2020	2023	2016-2023 Change (#)	2016-2023 Change (%)
Atlantic	Small	9,960	9,719	9,982	22	0.2%
	Medium	75	58	72	-3	-4.0%
	Large	9	3	6	-3	-33.3%
	<b>Total</b>	<b>10,044</b>	<b>9,780</b>	<b>10,060</b>	<b>16</b>	<b>0.2%</b>
Quebec	Small	30,397	32,267	34,981	4,584	15.1%
	Medium	234	292	363	129	55.1%
	Large	16	9	18	2	12.5%
	<b>Total</b>	<b>30,647</b>	<b>32,568</b>	<b>35,362</b>	<b>4,715</b>	<b>15.4%</b>
Ontario	Small	46,997	50,732	54,668	7,671	16.3%
	Medium	469	512	609	140	29.9%
	Large	38	33	37	-1	-2.6%
	<b>Total</b>	<b>47,504</b>	<b>51,277</b>	<b>55,314</b>	<b>7,810</b>	<b>16.4%</b>
Prairies	Small	10,221	9,506	9,427	-794	-7.8%
	Medium	112	82	93	-19	-17.0%
	Large	5	3	3	-2	-40.0%
	<b>Total</b>	<b>10,338</b>	<b>9,591</b>	<b>9,523</b>	<b>-815</b>	<b>-7.9%</b>
Alberta	Small	24,103	21,370	21,384	-2,719	-11.3%
	Medium	396	343	343	-53	-13.4%
	Large	53	23	27	-26	-49.1%
	<b>Total</b>	<b>24,551</b>	<b>21,734</b>	<b>21,754</b>	<b>-2,797</b>	<b>-11.4%</b>
British Columbia	Small	23,952	26,155	28,375	4,423	18.5%
	Medium	214	198	242	28	13.1%
	Large	10	12	12	2	20.0%
	<b>Total</b>	<b>24,176</b>	<b>26,365</b>	<b>28,629</b>	<b>4,453</b>	<b>18.4%</b>
Territories	Small	580	601	534	-46	-7.9%
	Medium	8	5	7	-1	-12.5%
	Large	-	-	-	-	-
	<b>Total</b>	<b>590</b>	<b>607</b>	<b>542</b>	<b>-48</b>	<b>-8.1%</b>
Canada	Small	146,223	150,361	159,359	13,136	9.0%
	Medium	1,512	1,490	1,732	220	14.6%
	Large	132	84	104	-28	-21.2%
	<b>Total</b>	<b>147,866</b>	<b>151,936</b>	<b>161,196</b>	<b>13,330</b>	<b>9.0%</b>

Source: (Statistics Canada, 2025)



**Figure 28, Figure 29, and Table 18** summarize the financial performance of Canada’s infrastructure sector between 2020 and 2023, including total industry revenues, expenses, and net income. Over this period, the sector experienced strong financial growth.

Industry trends include:

- Ontario recorded the largest absolute growth in both revenue and income, with revenue up 30% to \$186 billion and net income rising +30% to \$15.1 billion.
- British Columbia and Alberta experienced gains, with net income up 40% in both provinces, supported by significant increases in revenue (+34% and +26%, respectively).
- Quebec saw steady expansion, with revenue rising +33% and net income growing +24%, reflecting balanced growth across the sector.
- The Prairies had moderate financial gains, with revenue and expenses both up +28% and net income up +22%, indicating stable but slower growth relative to larger provinces.
- The Atlantic region’s revenue and expenses increased by +26%, while net income rose 32%, suggesting improved profitability.
- The Territories recorded similar percentage growth in both revenue (+22%) and expenses (+22%), with net income up 31%, consistent with a small but strengthening project base.

Overall, between 2020 and 2023, the infrastructure sector demonstrated strong earnings capacity and financial stability, with profits keeping pace with rising costs. These results point to a financially resilient sector, fueled by public infrastructure investment, recovery from pandemic-related slowdowns, and increased demand for construction and utility services.



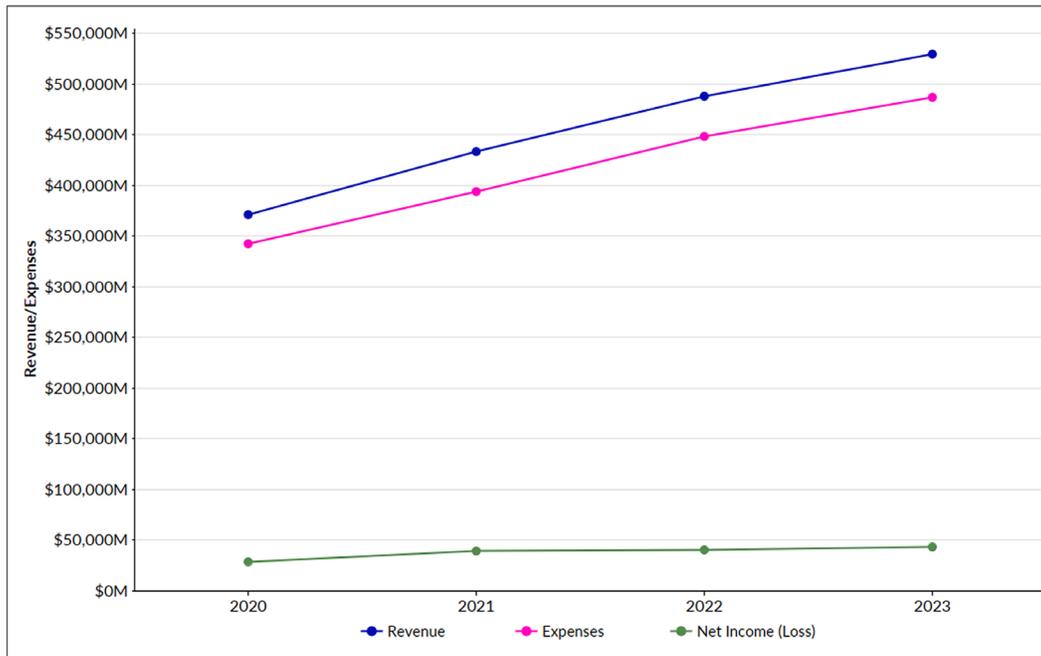
# Assembly of First Nations

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### Economic Reconciliation Report

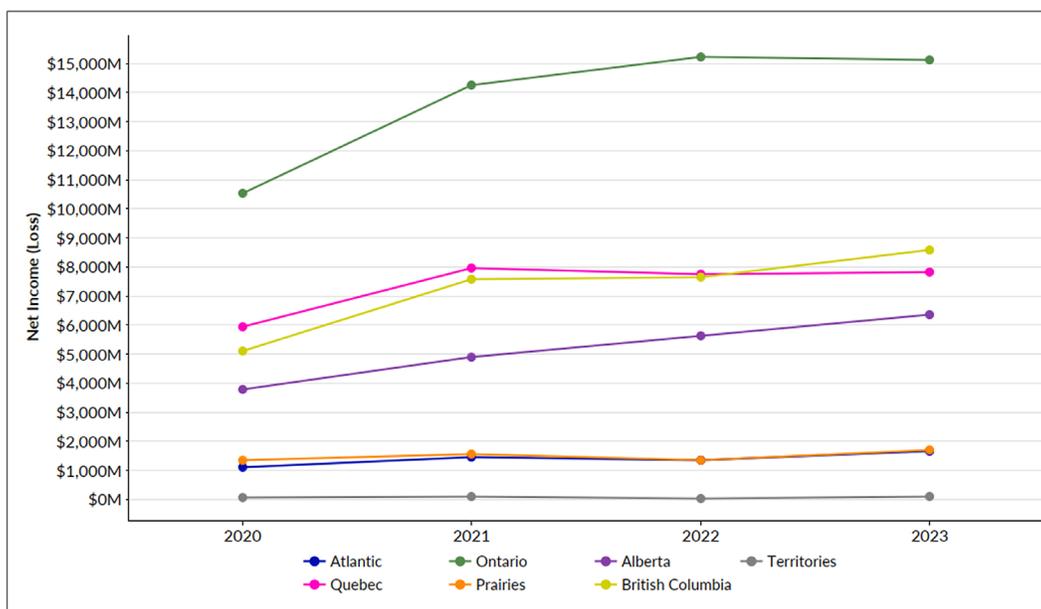
**Figure 28: Industry Income Statement, Infrastructure, Canada (2020 - 2023) (in millions of dollars)**

Source: (Statistics Canada, 2025)



**Figure 29: Industry Net Income (Loss), Infrastructure, Regional (2020 - 2023) (in millions of dollars)**

Source: (Statistics Canada, 2025)





# Sparking Prosperity

## Economic Reconciliation Report

**Table 18: Industry Revenue, Expenses, and Net Income (Loss), Infrastructure, Regional (2020 - 2023)**

Region	Revenue/Expense	2020	2023	2020-2023 Change (#)	2020-2023 Change (%)
Atlantic	Revenue	\$16,588,292,464	\$22,446,329,663	\$5,858,037,199	26%
	Expenses	\$15,463,048,544	\$20,789,302,100	\$5,326,253,556	26%
	<b>Net Income (Loss)</b>	<b>\$1,125,243,920</b>	<b>\$1,657,027,563</b>	<b>\$531,783,643</b>	<b>32%</b>
Quebec	Revenue	\$68,135,101,994	\$101,309,237,062	\$33,174,135,068	33%
	Expenses	\$62,198,982,931	\$93,470,000,114	\$31,271,017,183	33%
	<b>Net Income (Loss)</b>	<b>\$5,936,119,063</b>	<b>\$7,839,236,948</b>	<b>\$1,903,117,885</b>	<b>24%</b>
Ontario	Revenue	\$130,813,602,855	\$185,983,655,951	\$55,170,053,096	30%
	Expenses	\$120,270,113,310	\$170,860,823,546	\$50,590,710,236	30%
	<b>Net Income (Loss)</b>	<b>\$10,543,489,545</b>	<b>\$15,122,832,405</b>	<b>\$4,579,342,860</b>	<b>30%</b>
Prairies	Revenue	\$18,261,624,944	\$25,223,483,931	\$6,961,858,987	28%
	Expenses	\$16,921,321,835	\$23,503,445,834	\$6,582,123,999	28%
	<b>Net Income (Loss)</b>	<b>\$1,340,303,109</b>	<b>\$1,720,038,097</b>	<b>\$379,734,988</b>	<b>22%</b>
Alberta	Revenue	\$62,514,761,666	\$84,783,498,781	\$22,268,737,116	26%
	Expenses	\$58,723,639,550	\$78,421,346,770	\$19,697,707,220	25%
	<b>Net Income (Loss)</b>	<b>\$3,791,122,116</b>	<b>\$6,362,152,011</b>	<b>\$2,571,029,895</b>	<b>40%</b>
British Columbia	Revenue	\$63,431,298,594	\$95,460,380,526	\$32,029,081,932	34%
	Expenses	\$58,319,845,699	\$86,880,280,708	\$28,560,435,009	33%
	<b>Net Income (Loss)</b>	<b>\$5,111,452,895</b>	<b>\$8,580,099,818</b>	<b>\$3,468,646,923</b>	<b>40%</b>
Territories	Revenue	\$1,671,353,711	\$2,151,000,000	\$479,646,289	22%
	Expenses	\$1,595,895,300	\$2,042,000,000	\$446,104,700	22%
	<b>Net Income (Loss)</b>	<b>\$75,458,411</b>	<b>\$109,000,000</b>	<b>\$33,541,589</b>	<b>31%</b>
Canada	Revenue	\$371,252,178,862	\$529,470,971,510	\$158,218,792,647	30%
	Expenses	\$342,544,577,629	\$486,859,335,218	\$144,314,757,589	30%
	<b>Net Income (Loss)</b>	<b>\$28,707,601,234</b>	<b>\$42,611,636,292</b>	<b>\$13,904,035,058</b>	<b>33%</b>

Source: (Statistics Canada, 2025)



**Figure 30** and **Table 19** summarize the infrastructure sector’s contribution to Canada’s GDP between 2016 and 2023. Over this period, the sector’s total contribution rose from \$156.3 billion in 2016 to \$177.7 billion, an overall increase of +13.7%. Most of this growth occurred after 2020, reflecting renewed investment in construction, utilities, and public works following pandemic-related slowdowns.

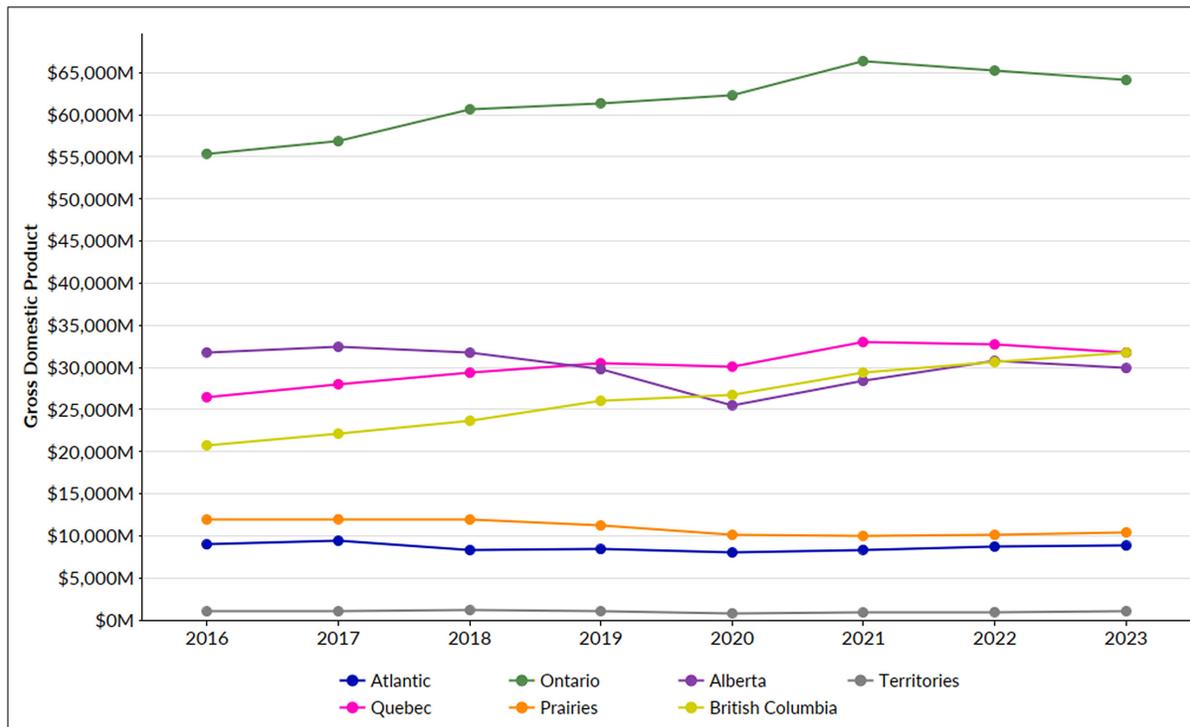
Industry highlights include:

- Ontario remained the largest contributor to national GDP, rising from \$55.4 billion to \$64.1 billion (+15.7%).
- Quebec contributed \$31.8 billion in 2023 (+20.1% since 2016), maintaining steady growth across the industry.
- British Columbia recorded the strongest relative increase (+52.8%), with GDP climbing to \$31.7 billion.
- Alberta’s GDP contribution declined by 6%, from \$31.8 billion to \$29.9 billion.
- The Prairies contracted by -12.5% over the period, with GDP falling to \$10.4 billion.
- Atlantic Canada showed a slight decline (-1.7%), while the Territories grew modestly (+5.3%) to just over \$1.0 billion, consistent with limited but stable project activity.

Overall, the infrastructure sector’s GDP performance highlights strong growth concentrated in central and western provinces, particularly British Columbia, Ontario, and Quebec. Gains in these regions reflect the influence of urban infrastructure expansion, public transit projects, and utility upgrades, while weaker results in Alberta and the Prairies indicate more region-specific investment challenges.

**Figure 30: Gross Domestic Product, Infrastructure, Regional (2016-2023) (in millions of dollars)**

Source: (Statistics Canada, 2025)





**Table 19: Gross Domestic Product, Infrastructure, Regional (2016-2023) (in millions of dollars)**

Region	2016	2020	2023	2016 - 2023 Change (#)	2016 - 2023 Change (%)
Atlantic	\$8,950.6	\$7,979.1	\$8,795.1	\$-155.5	-1.7%
Quebec	\$26,470.4	\$30,098.4	\$31,780.8	\$5,310.4	20.1%
Ontario	\$55,385.0	\$62,242.8	\$64,088.9	\$8,703.9	15.7%
Prairies	\$11,910.2	\$10,081.4	\$10,416.8	\$-1,493.4	-12.5%
Alberta	\$31,788.9	\$25,528.3	\$29,872.4	\$-1,916.5	-6.0%
British Columbia	\$20,761.5	\$26,704.4	\$31,733.3	\$10,971.8	52.8%
Territories	\$993.8	\$820.9	\$1,046.9	\$53.1	5.3%
Canada	\$156,260.4	\$163,455.3	\$177,734.2	\$21,473.8	13.7%

Source: (Statistics Canada, 2025)

### 3.2.3 Federal Government Participation

The federal government’s participation in Canada’s infrastructure sector is reflected in its ongoing budget allocations to Infrastructure Canada. Infrastructure Canada is responsible for supporting public infrastructure development and renewal across Canada. Its core mandate is to help build and maintain infrastructure that supports economic growth, environmental sustainability, and quality of life in Canadian communities.

**Figure 31** and **Table 20** present the federal budget allocations between the 2022-23 and 2024-25 fiscal years for Infrastructure Canada.

Between 2022-23 and 2024-25, the percent of the total Federal budget allocated to Infrastructure Canada was consistent in 2022-23 and 2024-25 at 1.8% but reached a high point in 2023-24 of 2.2% of the total budget.

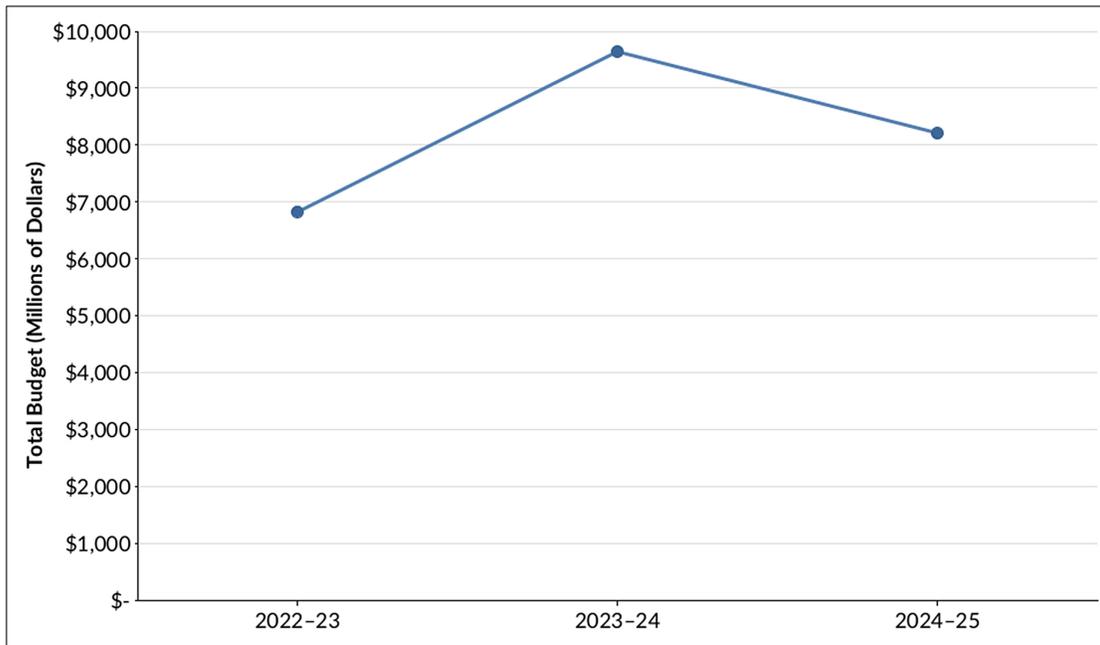
- Between 2022-23 and 2024-25 the total budget allocated to Infrastructure Canada increased +20.2% (\$1.376 billion)

The data demonstrates an ongoing and increasing commitment from the federal government to advance regulatory capacity, innovation, and infrastructure within the natural resources sector.



**Figure 31: Federal Government Department Budgetary Allocations, Infrastructure, (FY2022/23 - FY2024/25) (in millions of dollars)**

Source: (Avaanz Ltd., 2025) (Statistics Canada, 2025)



**Table 20: Federal Government Department Budgetary Allocations, Infrastructure, (FY2022/23 - FY2024/25) (In millions of dollars)**

Department	2022-23	2023-24	2024-25	2022/23 - 2024/25 Increase (%)	% of Total Federal Budget (2024/25)
Infrastructure Canada	\$6,829	\$9,644	\$8,205	20.2%	1.8%
<b>Total - Infrastructure Sector</b>	<b>\$6,829</b>	<b>\$9,644</b>	<b>\$8,205</b>	<b>20.2%</b>	<b>1.8%</b>

Source: (Avaanz Ltd., 2025) (Statistics Canada, 2025)



To assess government involvement in Canada's infrastructure sector, this analysis uses the Canadian Classification of Functions of Government (CCOFOG). CCOFOG is a standardized framework developed by Statistics Canada to classify government expenditures by their intended function or purpose, rather than by department or program.

Infrastructure-related government spending is identified through the following CCOFOG categories:

- 7044 - Mining, manufacturing, and construction (construction portion only)
- 7045 - Transport
- 7051 - Waste management
- 7052 - Wastewater management
- 706 - Housing and community amenities

These categories reflect federal investment in core infrastructure systems such as transportation, housing, water and wastewater services, and public works, providing a broad view of the government's role in building and maintaining Canada's physical and built environment.

**Figure 32, Figure 33, and Table 21** present the consolidated Canadian general government and the consolidated provincial-territorial and local governments spending within the infrastructure sector related CCOFOG categories. The Canadian general government represents the entire Canadian public sector, excluding government business enterprises, and is a consolidation of all levels of government. The provincial-territorial and local government includes provincial and territorial governments, health and social service institutions, universities and colleges, municipalities and other local public administrations, and school boards.

National trends:

- Total Canadian general government infrastructure spending grew from \$42.5 billion in 2016 to \$62.4 billion in 2023, a +47.0% increase.
- This reflects broad public sector prioritization of infrastructure, particularly in the post-2020 period in response to economic recovery, housing demand, and climate resilience.
- In 2023, infrastructure accounted for 2.88% of total general government expenditures, highlighting its continued fiscal significance.

Regional trends:

- Ontario led all provinces in 2023 with \$23.4 billion in infrastructure spending, representing a +58.7% increase since 2016. Ontario accounted for 1.08% of total general government spending, the highest among all provinces.
- Quebec followed with \$10.9 billion, increasing by +41.9% since 2016.
- British Columbia spent \$6.3 billion, growing +36.7% over the period.
- Atlantic Canada showed the highest percentage growth at +67.1%, although total spending remained lower at \$3.7 billion.
- The Prairies and Alberta saw modest growth (+10.5% and +10.4%, respectively), indicating more stable infrastructure investment levels.
- Territories maintained consistent spending, with a slight increase from \$736 million to \$855 million.



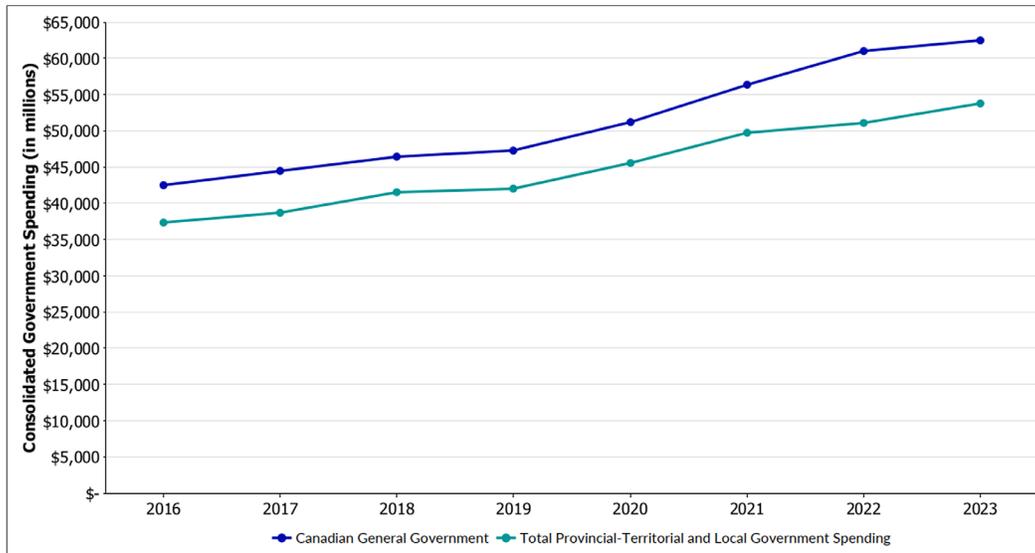
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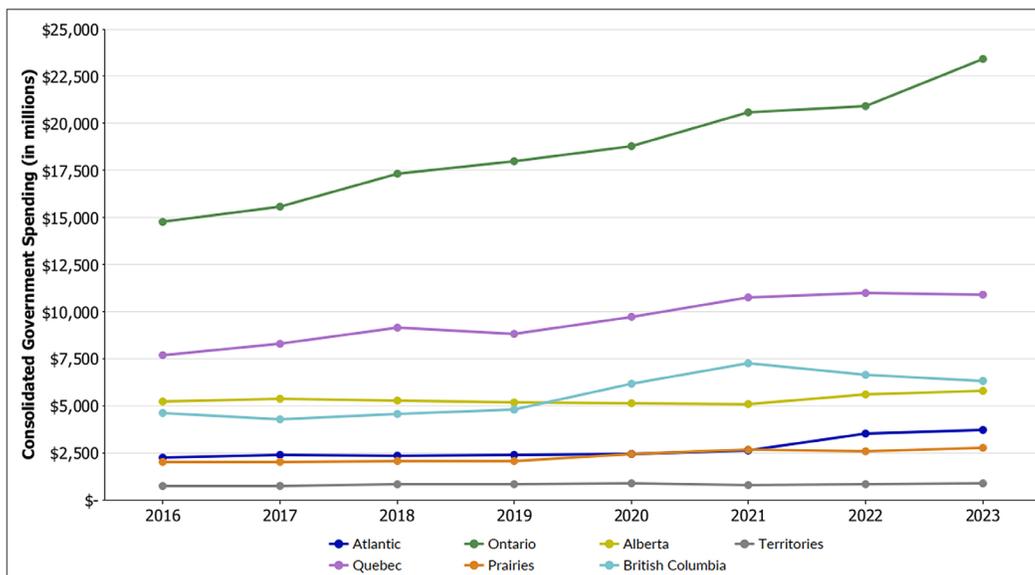
**Figure 32: Consolidated Canadian General Government Spending, Infrastructure Sector (2016-2023)**  
(in millions of dollars)

Source: (Statistics Canada, 2024)



**Figure 33: Consolidated Provincial-Territorial and Local Government Spending, Infrastructure (2016-2023) (in millions of dollars)**

Source: (Statistics Canada, 2024)





**Table 21: Consolidated Canadian General Government Spending, Infrastructure Sector (2016-2023)**  
(in millions of dollars)

Public Sector Component		2016	2023	% Change (2016-2023)	% of Total General Government Spending (2023)
<b>Canadian General Government Spending</b>		\$42,460	\$62,430	47.0%	2.88%
<b>Provincial-Territorial and Local Government Spending</b>	Atlantic	\$2,226	\$3,719	67.1%	0.17%
	Quebec	\$7,692	\$10,912	41.9%	0.50%
	Ontario	\$14,753	\$23,412	58.7%	1.08%
	Prairies	\$2,019	\$2,745	36.0%	0.13%
	Alberta	\$5,230	\$5,778	10.5%	0.27%
	British Columbia	\$4,629	\$6,329	36.7%	0.29%
	Territories	\$736	\$855	16.2%	0.04%
	<b>Total</b>	<b>\$37,285</b>	<b>\$53,750</b>	<b>44.2%</b>	<b>2.48%</b>

Source: (Statistics Canada, 2024)

**Figure 34** and **Table 22** present the provincial income tax, federal tax, and total tax received by the Canadian government from the infrastructure sector between 2016 and 2023.

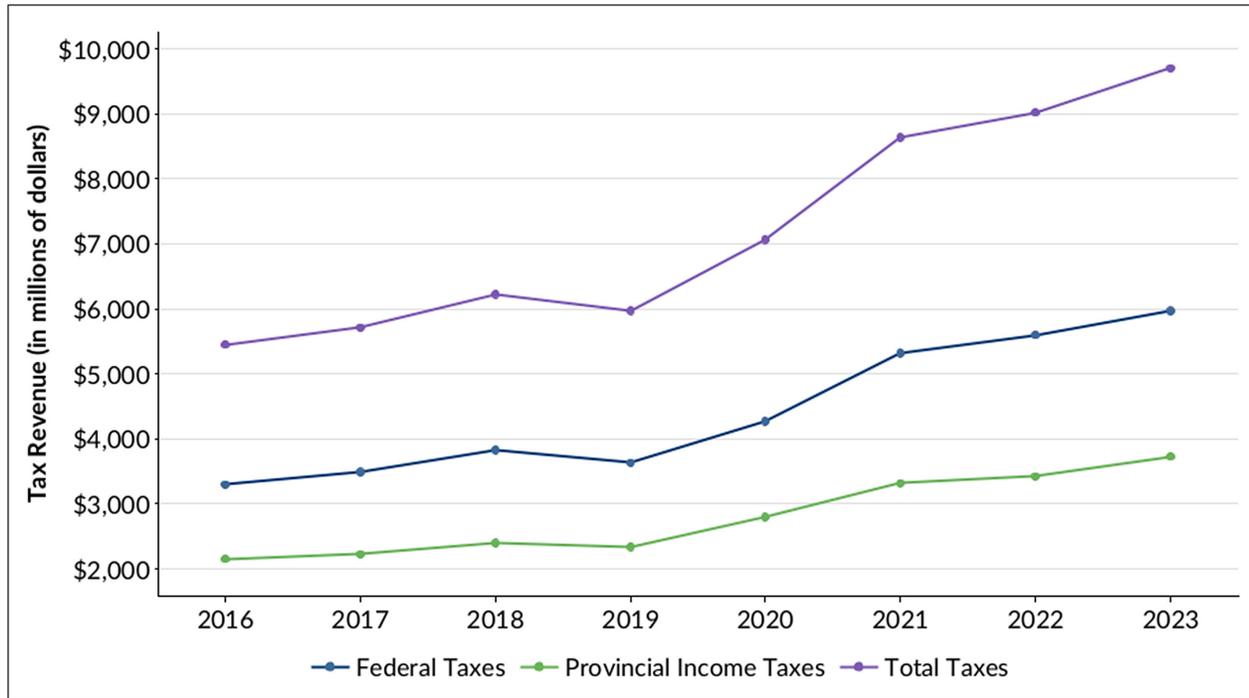
Between 2016 and 2023, tax revenue from the infrastructure sector experienced consistent and steady growth. Total tax revenue increased from approximately \$5.5 billion in 2016 to \$9.7 billion in 2023, driven by gradual rises in both federal and provincial income tax contributions. Federal tax revenue rose from approximately \$3.3 billion to \$6 billion between 2016 and 2023, respectively, while provincial income taxes increased from roughly \$2.2 billion to \$3.7 billion over the same period. The most notable growth occurred between 2020 and 2021, likely reflecting pandemic recovery investments and renewed infrastructure development. The consistent upward trajectory highlights the infrastructure sector's growing role in contributing to public finances and economic stability. The trend reflects stable, long-term growth in the infrastructure sector's economic contribution, without sharp fluctuations.

It should be noted that in 2020, content and industry grouping changes were made and as a result, the comparability of the estimates with those prior to 2020 reference year is impacted (Statistics Canada, 2025).



**Figure 34: Tax Revenue, Infrastructure Sector, Canada (2016-2023) (in millions of<sup>11</sup> dollars)<sup>12</sup>**

Source: (Statistics Canada, 2025)



**Table 22: Tax Revenue, Infrastructure Sector, Canada (2016, 2020,2023) (in millions of dollars)**

Tax Area	2016	2020	2023	2020 - 2023 Change (#)	2020 - 2023 Change (%)
Provincial Income Tax	\$2,158	\$2,796	\$3,734	\$938	33.6%
Federal Tax	\$3,297	\$4,273	\$5,966	\$1,693	39.6%
<b>Total Taxes</b>	<b>\$5,456</b>	<b>\$7,069</b>	<b>\$9,700</b>	<b>\$2,631</b>	<b>37.2%</b>

Source: (Statistics Canada, 2025)

<sup>11</sup> Data may change from year to year for several reasons, including economic growth or decline, merger and acquisition activity, industry reclassifications, changes in methodology, and revisions to the data.

<sup>12</sup> Beginning with the 2019 reference year, the financial and taxation statistics does not include federal and provincial government business enterprises (GBEs).



### 3.2.4 First Nation Participation

This section provides a regional overview of **First Nations participation in the infrastructure sector**, focusing on employment levels, income, and economic contribution. It highlights variations across provinces and territories and offers a baseline for understanding Indigenous engagement in infrastructure-related industries.

#### 3.2.4.1 Labour Market

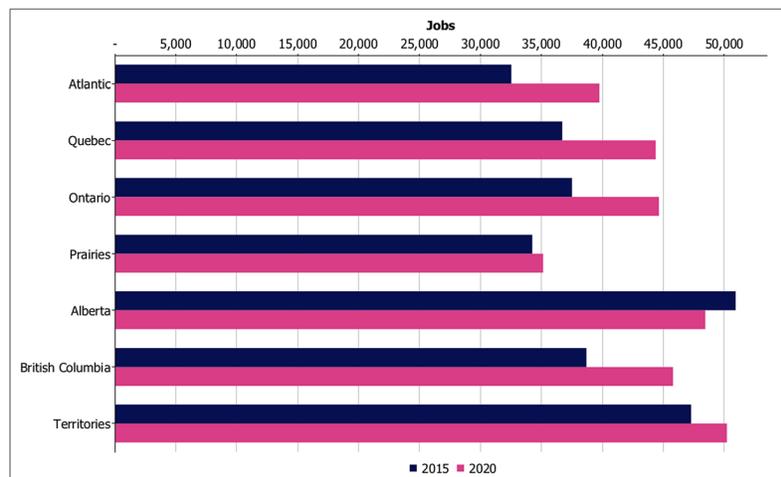
**Figure 35** and **Table 23** present the number of First Nations employment income recipients in the infrastructure sector by region in 2015 and 2020. Nationally, the number of recipients increased modestly by 3.6%, rising from 37,320 in 2015 to 38,675 in 2020. This overall growth reflects relatively stable employment levels through a period marked by project fluctuations and regional differences in infrastructure investment.

- Ontario recorded the highest number of recipients in both years, increasing by 15.3%, followed by British Columbia (+8.4%) and Quebec (+37.1%), which saw the strongest proportional gain nationally.
- The Prairies (-6.4%), Alberta (-14.3%), and Territories (-30.6%) experienced declines, likely linked to economic contractions, completion of major capital projects, and reduced infrastructure spending during the latter half of the period.
- The Atlantic region remained comparatively stable, with a slight decline of -4.4%, consistent with smaller-scale infrastructure activity and population size.

Regional variation in employment trends underscores the uneven distribution of infrastructure opportunities across Canada. Growth in Ontario, Quebec, and British Columbia suggests increasing inclusion of First Nations workers in large-scale infrastructure projects, while declines elsewhere point to the cyclical nature of project-based employment and regional economic shifts.

**Figure 35: First Nation Industry Employment, Infrastructure, Regional (2015 and 2020)**

Source: (Statistics Canada, 2023)





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**Table 23: First Nation Employment, Infrastructure, Regional (2015 and 2020)**

Region	2015	2020	2015 - 2020 Change (#)	2015 - 2020 Change (%)
Atlantic	3,065	2,929	-136	-4.4%
Quebec	3,545	4,859	1,314	37.1%
Ontario	8,570	9,882	1,312	15.3%
Prairies	6,890	6,446	-444	-6.4%
Alberta	6,720	5,757	-963	-14.3%
British Columbia	7,360	7,977	617	8.4%
Territories	1,170	812	-358	-30.6%
Canada	37,320	38,675	1,355	3.6%

Source: (Statistics Canada, 2023)

**Figure 36** and **Table 24** shows average employment income for First Nations individuals in the infrastructure sector in 2015 and 2020. Income levels vary across regions but are stable across the nation:

- The Territories reported the highest averages at \$50,214.
- The Atlantic and Prairies reported the lowest average wages in 2020 with \$39,752 and \$35,135, respectively. Although the Atlantic reported the second lowest average wages within the nation, they saw the largest percentage increase in average wages between 2015 and 2020 with a growth of +22.2%.
- Overall, Canada saw average wages of \$43,576 in 2020, a +9.1% growth from 2015.

These differences may reflect regional wage structures, project types, or small sample sizes.

**Figure 36: First Nation Average Employment Income, Infrastructure, Regional (2015 and 2020)**

Source: (Statistics Canada, 2023)





**Table 24: First Nation Average Employment Income, Infrastructure, Regional (2015 and 2020)**

Region	2015	2020	2015 - 2020 Change (#)	2015 - 2020 Change (%)
Atlantic	\$32,526	\$39,752	\$7,226	22.2%
Quebec	\$36,708	\$44,368	\$7,661	20.9%
Ontario	\$37,503	\$44,636	\$7,133	19.0%
Prairies	\$34,244	\$35,135	\$891	2.6%
Alberta	\$50,930	\$48,434	\$-2,496	-4.9%
British Columbia	\$38,688	\$45,792	\$7,104	18.4%
Territories	\$47,272	\$50,214	\$2,942	6.2%
Canada	\$39,932	\$43,576	\$3,644	9.1%

Source: (Statistics Canada, 2023)

### 3.2.4.2 Industry

**Figure 29** and **Table 25** presents total output attributed to First Nations participation in the infrastructure sector between 2016 and 2022. Across Canada, First Nations related infrastructure output increased by approximately +31.3%, reaching an estimated \$7.3 billion in 2022. This growth reflects expanding participation of Indigenous workers and businesses in public infrastructure, transportation, and utility projects, as well as increased recognition of Indigenous procurement and partnership opportunities.

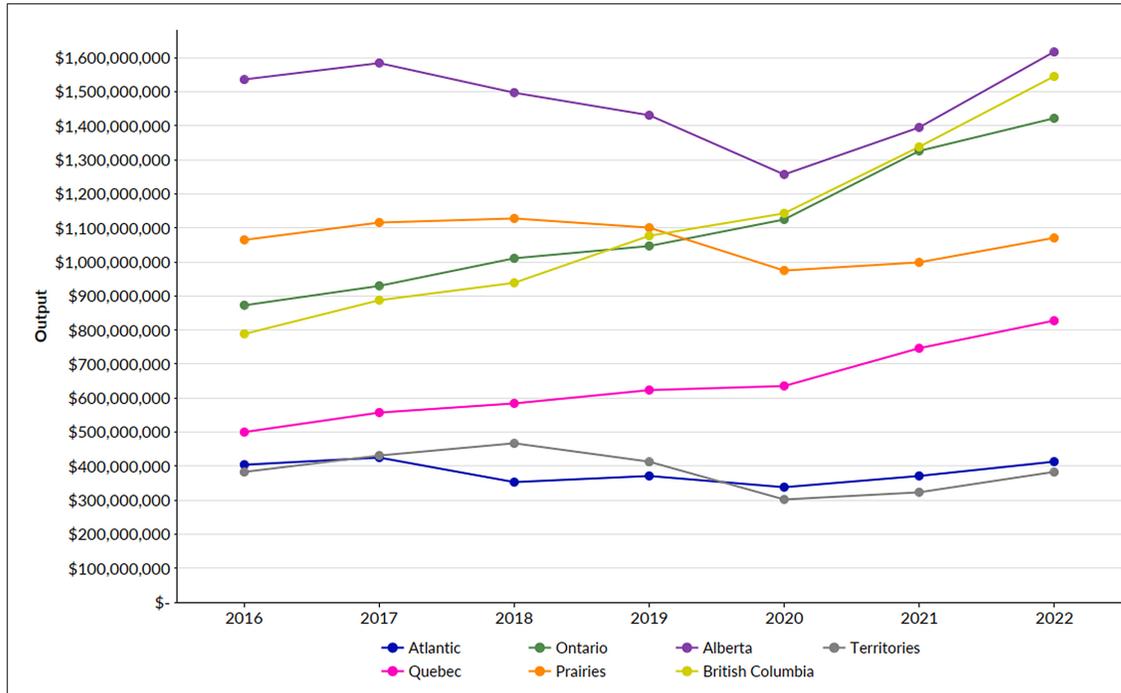
- The largest absolute gains occurred in British Columbia (+95.6%), Ontario (+62.8%), and Quebec (+65.6%), consistent with regions experiencing strong investment in transportation, energy, and community infrastructure.
- Alberta posted moderate growth (+5.3%) following early declines in 2020 tied to energy sector slowdowns and delayed project starts.
- The Prairies, Atlantic, and Territories remained stable, with limited year-over-year variation, suggesting a plateau in major infrastructure development or constrained access to contracting opportunities.
- British Columbia led all provinces in relative growth, with output nearly doubling over the six-year period, underscoring the province's role as a national hub for Indigenous-involved infrastructure delivery.

These trends illustrate a continuing upward trajectory in the scale of First Nations economic activity within the infrastructure sector, particularly in provinces with strong policy frameworks for Indigenous inclusion and active capital investment pipelines.



**Figure 37: First Nation Output, Infrastructure, Regional**

Source: (Statistics Canada, 2025)



**Table 25: First Nation Output, Infrastructure, Regional (in thousands of dollars)**

Region	2016	2020	2022	2016 - 2022 Change (#)	2016 - 2022 Change (%)
Atlantic	\$404,643	\$338,847	\$413,384	\$8.7	0.00%
Quebec	\$499,208	\$636,706	\$826,553	\$327.3	0.07%
Ontario	\$873,454	\$1,124,687	\$1,422,055	\$548.6	0.06%
Prairies	\$1,065,476	\$976,089	\$1,070,107	\$4.6	0.00%
Alberta	\$1,535,229	\$1,257,566	\$1,616,257	\$81.0	0.01%
British Columbia	\$789,854	\$1,143,048	\$1,544,839	\$755.0	0.10%
Territories	\$381,851	\$302,432	\$381,528	\$-0.3	-0.00%
Canada	\$404,643	\$338,847	\$413,384	\$8.7	0.00%

Source: (Statistics Canada, 2025)



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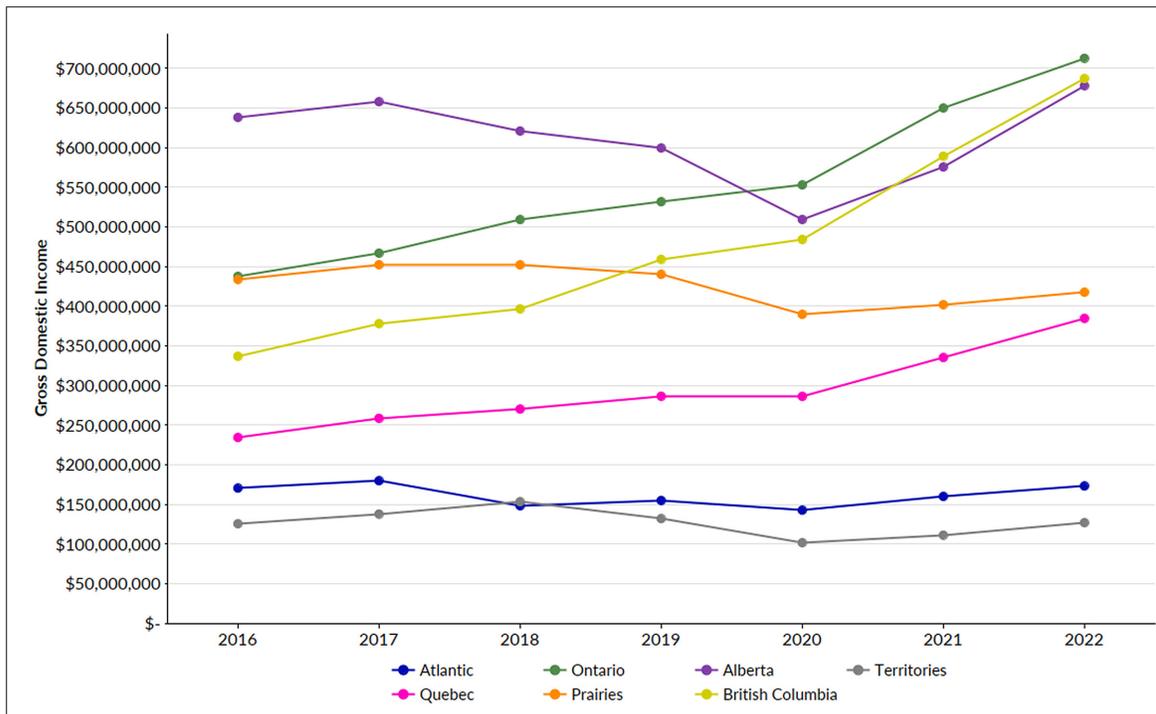
**Figure 38** and **Table 26** show gross domestic income (GDI) attributed to First Nations participation in the infrastructure sector between 2016 and 2022. Nationally, GDI rose by 31.1%, reaching over \$14 billion in 2022. This reflects both an expansion in infrastructure investment and increasing Indigenous participation in related contracting, employment, and business activities.

- The strongest regional growth occurred in British Columbia (+95.6%), Quebec (+65.6%), and Ontario (+62.8%), driven by major infrastructure investments, resource corridor projects, and enhanced First Nations engagement through equity participation and procurement initiatives.
- Alberta recorded modest growth (+5.3%), following earlier declines linked to the 2020 pandemic period and slower recovery in energy-related infrastructure construction.
- The Prairies, Atlantic, and Territories exhibited limited change over the six-year period, reflecting smaller project pipelines and constrained opportunities for large-scale infrastructure development in these regions.
- Despite regional variation, all jurisdictions show evidence of resilience and gradual reinvestment following the economic disruptions of 2020.

Overall, the data indicate that First Nations economic contributions to Canada’s infrastructure sector are expanding. Continued growth, particularly in British Columbia and Ontario, underscores the increasing role of Indigenous-led firms and joint ventures in major public works and energy infrastructure projects.

**Figure 38: Gross Domestic Income Attributed to First Nations, Infrastructure, Regional (2016-2022)**

Source: (Statistics Canada, 2025)





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**Table 26: Gross Domestic Income Attributed to First Nations, Infrastructure, Regional (2016-2022)**  
(in thousands of dollars)

Region	2016	2020	2022	2016 - 2022 Change (#)	2016 - 2022 Change (%)
Atlantic	\$170,030	\$142,300	\$172,732	\$2.7	0.00%
Quebec	\$233,989	\$286,122	\$384,822	\$150.8	0.06%
Ontario	\$437,538	\$552,593	\$713,125	\$275.6	0.06%
Prairies	\$434,021	\$389,385	\$417,407	\$-16.6	-0.00%
Alberta	\$638,128	\$509,372	\$678,370	\$40.2	0.01%
British Columbia	\$337,095	\$484,393	\$686,742	\$349.6	0.10%
Territories	\$125,314	\$101,510	\$126,879	\$1.6	0.00%
Canada	\$170,030	\$142,300	\$172,732	\$2.7	0.00%

Source: (Statistics Canada, 2025)



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## 4. Industry Forecasts and Projected Economic Impacts

This section produces industry forecasts with four indicators of economic growth: **employment, output, GDP, and labour income**. Forecasts are based on projected employment levels and apply **Statistics Canada's Input-Output multipliers** to estimate direct economic impacts across the forecast horizon.

This section will also provide forecasted estimates of First Nations involvement in the natural resources and infrastructure sectors. These estimates are quantitative and presented in this section without a deeper analysis of *how* First Nations meet or exceed expected involvement. Section 5 provides this deeper analysis with a survey of the objectives of First Nations to remove systemic barriers and to have the greater capacity and control of their economic participation in the natural resource and infrastructure sectors.

### 4.1 Canada's Labour Force

**Figure 39** and **Table 27** present forecasted labour force levels in Canada from 2023 to 2033, broken down by major age groups (15-34, 35-54, and 55+). The projections show steady growth in the total labour force over the next decade, increasing from 21.3 million individuals in 2023 to 24.0 million individuals by 2033. While all age groups experience some level of growth, the distribution of labour force participation shifts modestly across the period, with the core working-age population (35-54 years) remaining the largest component of Canada's labour supply.

Key trends emerging from the forecast include:

- The total labour force is projected to grow by approximately 2.7 million workers between 2023 and 2033, a 12.7% increase, reflecting population growth, immigration, and ongoing labour market participation among all age groups.
- Individuals aged 35-54 remain the dominant segment, growing from 8.93 million in 2023 to 10.63 million by 2033, and continuing to represent the primary source of skilled, experienced labour across the Canadian economy.
- Young workers aged 15-34 also expand steadily, increasing by roughly 714,500 individuals over the decade, supporting early-career occupations and new entrants into trades, technical roles, and training pipelines.
- The labour force aged 55 and over grows modestly, rising from 4.57 million in 2023 to 4.87 million in 2033; however, growth slows after 2027, suggesting increasing retirements and a gradual contraction of older-age participation rates.
- Growth across the younger and core working-age populations is essential to offset future retirements, particularly as the 55+ population stabilizes, and more experienced workers exit the labour market.
- The relative stability of total labour force growth contrasts with projected sector-specific labour pressures, including the significant replacement demand anticipated within natural resources and infrastructure industries.



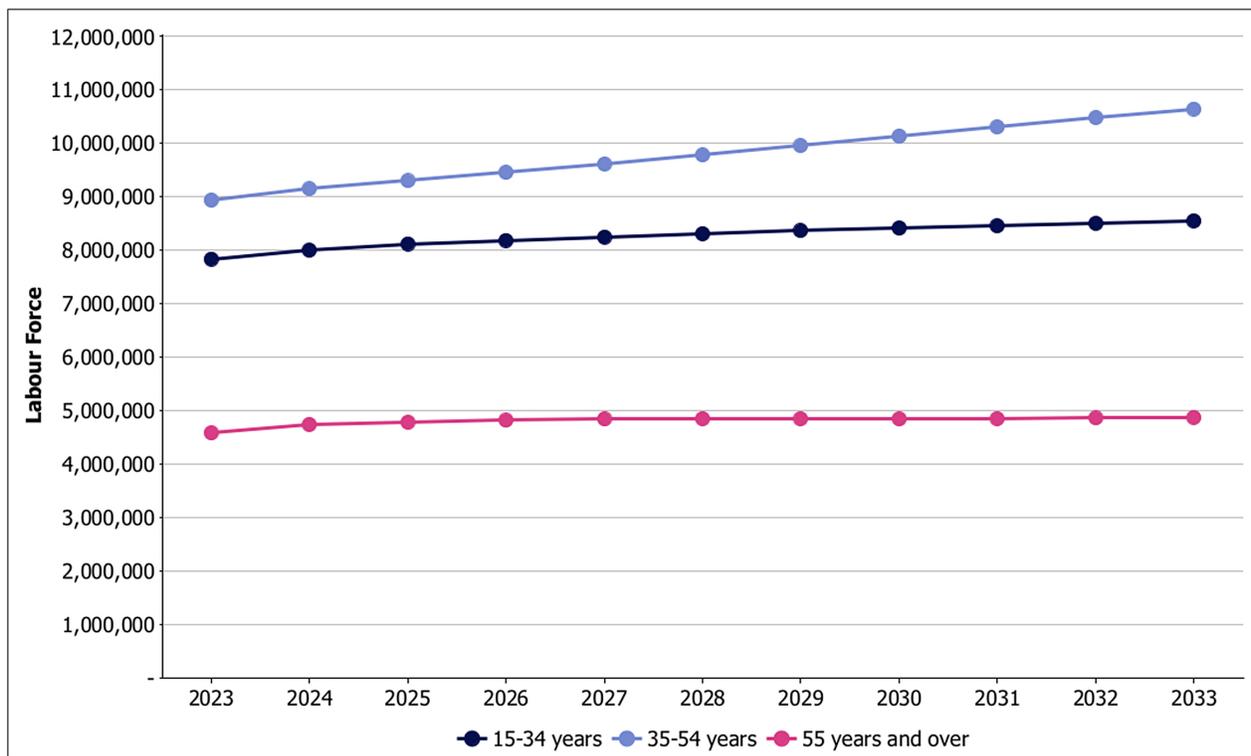
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Taken together, these projections highlight a national labour force that is growing but also undergoing demographic shifts that will influence long-term labour availability, particularly for industries facing high retirement rates and strong replacement needs. As demand for workers in natural resources and infrastructure continues to rise, ensuring sufficient participation across all age groups will be critical to meeting future workforce requirements. The broader labour force trends presented here underscore the importance of expanding and diversifying labour supply to support essential sectors and maintain Canada's economic stability over the coming decade.

**Figure 39: Labour Force Projections by Age Group, Canada, 2023-2033**

Source: (Government of Canada, 2025)





**Table 27: Labour Force Projections by Age Group, Canada, 2023-2033**

Year	15 to 34	35 to 54	55 and over	Total
2023	7,829,300	8,927,500	4,573,400	21,330,200
2024	7,989,900	9,138,900	4,732,900	21,861,700
2025	8,114,000	9,289,500	4,773,900	22,177,400
2026	8,177,900	9,446,700	4,808,800	22,433,400
2027	8,239,300	9,602,900	4,835,100	22,677,300
2028	8,301,800	9,771,900	4,843,100	22,916,800
2029	8,357,200	9,947,300	4,840,600	23,145,100
2030	8,406,700	10,123,300	4,837,400	23,367,400
2031	8,447,000	10,296,500	4,843,200	23,586,700
2032	8,493,700	10,470,300	4,852,300	23,816,300
2033	8,543,800	10,634,200	4,866,000	24,044,000

Source: (Government of Canada, 2025)

## 4.2 Natural Resources

This subsection outlines forecasted economic trends in Canada’s natural resources sector, including projected growth in employment and GDP. The sector is expected to expand steadily through 2033, with moderate annual growth driven by sustained demand and new investment in resource-based industries.

### 4.2.1 Employment Forecast

**Figure 40** and **Table 28** present forecasted employment demand in Canada’s natural resources sector from 2023 to 2033, highlighting a period of modest but steady growth. Overall, employment levels increase gradually from just over 726,000 positions in 2023 to approximately 746,000 positions by 2033. While year-to-year changes are small, the trajectory remains consistently upward, indicating stable long-term demand for natural-resource-related occupations despite slower growth compared with the broader Canadian economy.



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Key trends shown in the data include:

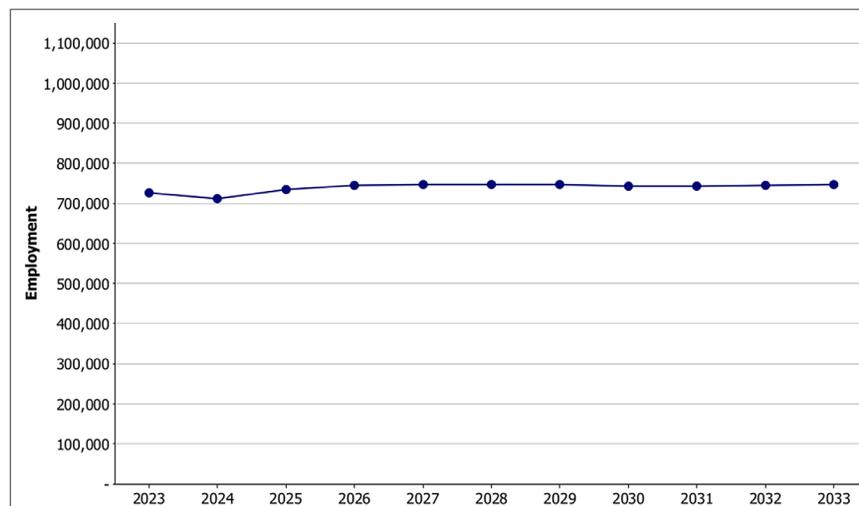
- Natural resources employment is projected to grow by 20,090 jobs over the ten-year period, representing 2.8% total growth, which is significantly lower than the 12.9% growth expected across all industries.
- Employment levels remain relatively stable from 2025 onward, fluctuating only slightly around the mid-740,000 range, demonstrating minimal volatility in long-term demand.
- The narrow growth range suggests a mature sector, where job creation is steady but incremental rather than driven by rapid expansion or large new industry developments.
- Compared with national labour trends, natural resources employment increases at a slower pace, reflecting ongoing structural economic shifts toward service-intensive and knowledge-based industries.
- Despite limited growth, the natural resources sector continues to maintain a large, consistent labour footprint, with employment levels remaining above 700,000 throughout the entire forecast window.

The data indicate that the natural resources sector will remain a stable and significant source of employment over the next decade, with consistent demand for skilled and experienced workers. Although growth is modest relative to the broader economy, the sector's steady employment baseline underscores its ongoing importance to Canada's labour market and highlights the need for continued workforce development, particularly in technical and trades-based occupations that support natural resource operations across the country.

Taken together, these results suggest that the natural resources sector will continue to have a consistent, ongoing need for skilled labour, particularly in technical, trades, and operational roles tied to mining, forestry, oil and gas, and major infrastructure. Although overall growth is limited, the steady demand reinforces the importance of sustained workforce development, training, and labour-market participation, especially among First Nation communities that maintain strong ties to natural resource economies and play an increasingly vital role in project development and workforce supply.

**Figure 40: Forecasted Employment Demand, Natural Resources, Canada, 2023-2033**

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)





**Table 28: Forecasted Employment Demand, Natural Resources, Canada, 2023-2033**

Industry	2023	2033	2023 - 2033 Growth (#)	2023 - 2033 Growth (%)
<b>Natural Resources</b>	726,071	746,161	20,090	2.8%
<b>All Industries</b>	20,170,900	22,760,800	2,589,900	12.9%

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)

**Figure 41** and **Table 29** present forecasted job growth, labour loss, and total job openings in Canada’s natural resources sector from 2025 to 2033, highlighting how overall labour demand is shaped primarily by workforce attrition rather than new job creation. Job growth fluctuates considerably across the forecast window, from strong expansion in 2025 to a temporary contraction in 2030, while labour loss remains consistently high. Labour loss in this dataset includes retirements, emigration (workers permanently leaving the country), and in-service mortality, each of which contributes to the need for ongoing replacement hiring in the sector.

Key trends shown in the data include:

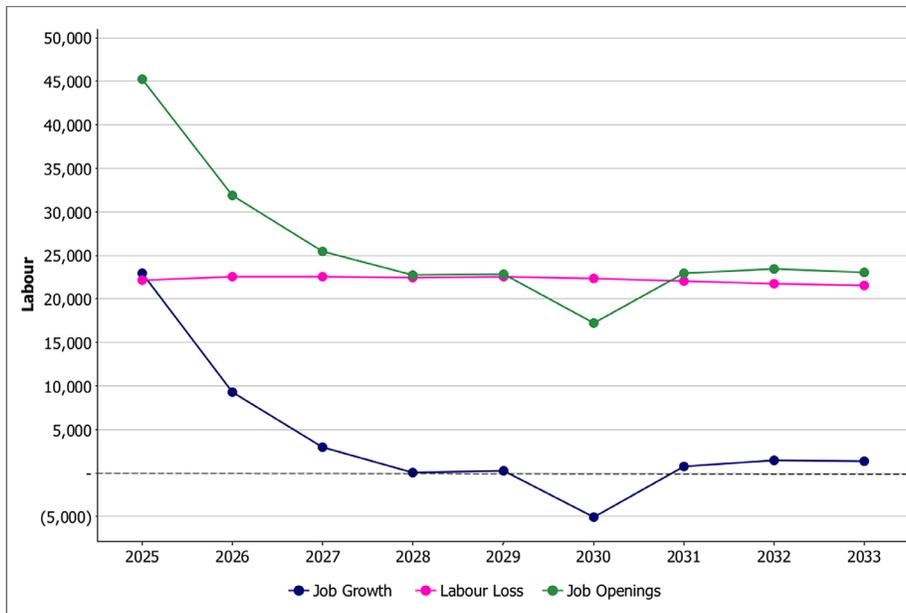
- Job openings are driven overwhelmingly by labour loss rather than new job creation, with total labour loss (200,277 workers) far exceeding cumulative job growth (34,011 workers) between 2025 and 2033.
- Job growth declines sharply after 2025, falling from 22,963 positions in 2025 to near zero by 2028 and briefly turning negative in 2030 (-5,045 jobs), before stabilizing at modest positive levels through 2033.
- Labour loss remains consistently around 21,500-22,600 workers per year, reflecting a maturing workforce with ongoing retirements and persistent emigration pressures, a notable factor in remote and resource-dependent regions where workers may relocate for alternative opportunities.
- Total job openings fall from 45,254 in 2025 to a low of 17,236 in 2030, driven largely by the temporary contraction in job growth, before recovering to approximately 23,000 openings annually between 2031 and 2033.
- Even in years with minimal job growth, the sector experiences substantial job openings due to retirements and other forms of attrition, reinforcing the need for continuous workforce replenishment.

Overall, the data indicates that long-term labour demand in the natural resources sector is dominated by replacement needs rather than new job creation. While future employment growth is modest and at times volatile, the consistently high volume of labour loss, driven by retirements, emigration, and in-service mortality, creates a steady demand for new workers each year. This dynamic underscores the importance of workforce development, recruitment, and training initiatives to ensure a reliable labour supply across Canada’s natural resource industries.



**Figure 41: Forecasted Job Growth, Labour Loss, and Job Openings, Natural Resources, Canada, 2025-2033**

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)



**Table 29: Forecasted Job Growth, Labour Loss, and Job Openings, Natural Resources, Canada, 2025-2033**

Year	Job Growth	Labour Loss	Job Openings
2025	22,963	22,197	45,254
2026	9,301	22,590	31,891
2027	2,955	22,582	25,436
2028	55	22,482	22,736
2029	255	22,582	22,836
2030	-5,045	22,382	17,236
2031	747	22,082	22,929
2032	1,440	21,790	23,421
2033	1,340	21,590	23,021
<b>Total (2025-2033)</b>	<b>34,011</b>	<b>200,277</b>	<b>234,760</b>

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)



### 4.2.2 Economic Impact

**Figure 42** and **Table 30** present forecasted Gross Domestic Product (GDP) generated by Canada's natural resources sector from 2023 to 2033, illustrating a decade of steady and moderate economic expansion. Over this period, the sector's GDP is projected to rise from approximately \$194.1 billion in 2023 to \$218.5 billion by 2033. Although growth is gradual, the upward trend highlights the sector's continued importance as a contributor to Canada's overall economic performance, even as its pace of expansion remains slower than that of the national economy.

Key economic impact trends shown in the data include:

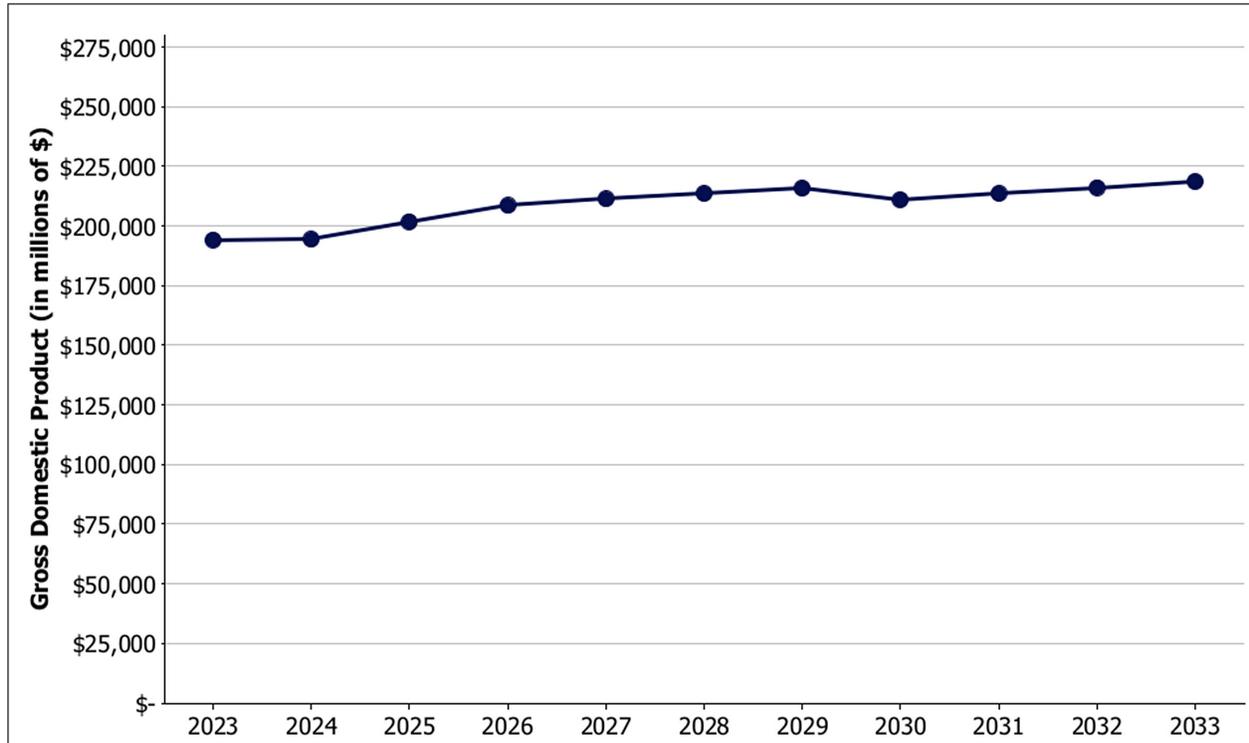
- Natural resources GDP is expected to increase by \$24.4 billion between 2023 and 2033, representing 12.6% growth over the ten-year period.
- GDP growth is relatively stable year-to-year, with gradual increases through 2029, a small dip in 2030, and a return to steady gains through 2033, indicating consistent industry output despite broader economic volatility.
- The broader Canadian economy grows more rapidly, with all-industries GDP increasing by 19.1% over the same period, demonstrating that while natural resources remain influential, economic growth is increasingly driven by diversified and service-based industries.
- Growth in the natural resources sector remains meaningful in absolute terms, maintaining a GDP contribution exceeding \$200 billion annually across most of the forecast horizon.
- Projected stability in natural resources GDP supports long-term economic planning, particularly for regions and communities where resource development, extraction, and related supply chain activities serve as central economic drivers.

Overall, the forecast indicates that Canada's natural resources sector will continue to generate substantial economic value over the next decade, contributing more than \$200 billion annually to national GDP and demonstrating steady, sustainable growth. Although the sector expands more slowly than the wider economy, its consistent output underscores its enduring role in supporting national economic performance, regional development, and Indigenous economic participation in resource-driven projects across the country.



**Figure 42: Forecasted Industry GDP, Natural Resources, Canada, 2023-2033 (in millions of dollars)**

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)



**Table 30: Forecasted Industry GDP, Natural Resources, Canada, 2023-2033 (in millions of dollars)**

Industry	2023	2033	2023 - 2033 Growth (#)	2023 - 2033 Growth (%)
Natural Resources	\$194,123	\$218,545	\$24,422	12.6%
All Industries	\$2,202,428	\$2,623,109	\$420,681	19.1%

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)



### 4.3 Infrastructure

This subsection outlines forecasted economic trends in Canada's infrastructure sector, including projected growth in employment and GDP. The sector is expected to expand steadily through 2033, with moderate annual growth driven by sustained demand and new investment in resource-based industries.

#### 4.3.1 Employment Forecast

**Figure 43** and **Table 31** present forecasted employment demand in Canada's infrastructure sector from 2023 to 2033, showing a strong and sustained upward trajectory over the next decade. Employment in infrastructure-related industries is projected to rise from approximately 1.59 million workers in 2023 to 1.84 million workers by 2033. This steady growth reflects ongoing investment in construction, transportation, utilities, and public works, all of which continue to play a critical role in supporting national economic activity and population growth.

Key trends shown in the data include:

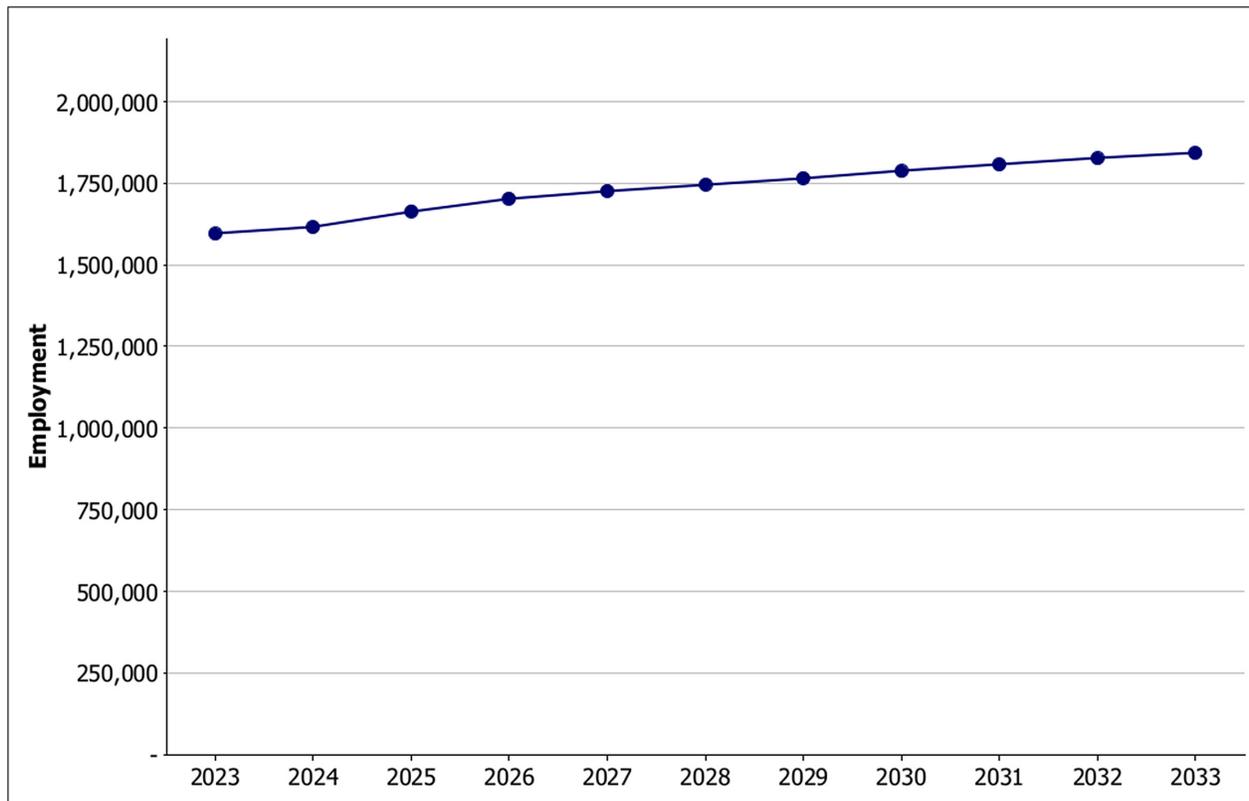
- Infrastructure employment is projected to increase by 247,731 workers over the next ten-year period, representing a 15.54% growth rate, outpacing the 12.84% growth expected across all industries in Canada.
- Employment increases consistently year after year, with no periods of decline, demonstrating sustained labour demand tied to long-term infrastructure development, maintenance requirements, and public-sector investment.
- The rate of growth stabilizes after 2026, with annual increases becoming more gradual but remaining positive throughout the forecast horizon.
- Infrastructure maintains a significantly larger employment footprint than natural resources, with employment levels exceeding 1.7 million workers from 2027 onward.
- The sector's strong forecasted growth aligns with national priorities, including transportation upgrades, housing development, climate adaptation projects, and modernization of public utilities and essential services.

Overall, the forecast indicates that the infrastructure sector will be one of the more robust drivers of employment growth in Canada over the next decade. With rising demand across construction, transportation, utilities, and public works, the sector will require a substantial and reliable workforce to deliver essential infrastructure projects nationwide. This sustained expansion underscores the importance of workforce development initiatives, training pathways, and recruitment strategies, particularly in regions and communities with growing demographic and economic needs.



**Figure 43: Forecasted Employment Demand, Infrastructure, Canada**

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)



**Table 31: Forecasted Employment Demand, Infrastructure, Canada**

Industry	2023	2033	2023 - 2033 Growth (#)	2023 - 2033 Growth (%)
Infrastructure	1,594,527	1,842,258	247,731	15.54%
All Industries	20,170,900	22,760,800	2,589,900	12.84%

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)



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**Figure 44** and **Table 32** present forecasted job growth, labour loss, and total job openings in Canada's infrastructure sector from 2025 to 2033, showing that labour demand in this sector is consistently high and driven by both expanding project activity and substantial replacement needs. Job growth remains strong through the early years, particularly in 2025 and 2026, before stabilizing at lower but steady levels toward the end of the forecast period. Labour loss, which includes retirements, emigration, and in-service mortality, remains significant across all years, contributing heavily to the persistent need for new workers across infrastructure occupations.

Key trends shown in the data include:

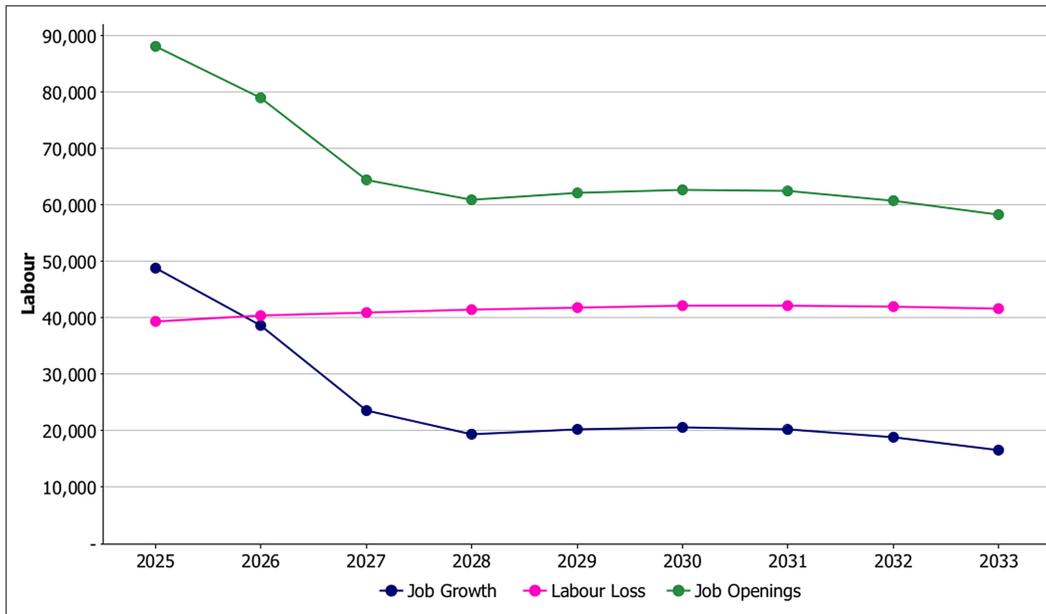
- Job openings are driven by both new job creation and workforce attrition, resulting in a total demand of 598,625 workers between 2025 and 2033, substantially higher than many other sectors of the economy.
- Job growth is particularly strong in 2025 (48,740 jobs), followed by a sharp dip by 2027, after which annual job growth stabilizes around 18,000-21,000 positions.
- Labour loss remains consistently high, ranging from approximately 39,400 to 42,100 workers annually, reflecting the sector's aging workforce and ongoing retirements, as well as the impacts of emigration and in-service mortality.
- Total job openings decline gradually over the period, falling from 88,058 in 2025 to 58,288 by 2033, but remain elevated, indicating ongoing and sustained recruitment demands.
- Cumulative labour loss (371,795 workers) far exceeds cumulative job growth (226,807 workers), underscoring that the majority of hiring needs are replacement-driven rather than tied to sector expansion.
- Even as job growth moderates, the infrastructure sector still requires 58,000-63,000 workers annually in the later years of the projection, demonstrating persistent labour shortages and high turnover pressures.

Overall, the forecast illustrates that Canada's infrastructure sector will face substantial and ongoing workforce demands over the next decade, driven largely by the need to replace retiring workers and sustain essential construction, transportation, utility, and public works activities. While job growth declines from the peak observed in 2025 and 2026, strong replacement needs ensure that labour demand remains consistently high. This highlights the importance of strategic workforce development, training pipelines, and continued recruitment efforts to support the long-term delivery of infrastructure projects across Canada.



**Figure 44: Forecasted Job Growth, Labour Loss, and Job Openings, Infrastructure, Canada, 2025-2033<sup>13</sup>**

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)



**Table 32: Forecasted Job Growth, Labour Loss, and Job Openings, Infrastructure, Canada, 2025-2033**

Year	Job Growth	Labour Loss	Job Openings
2025	48,740	39,411	88,058
2026	38,701	40,318	79,019
2027	23,547	40,926	64,473
2028	19,447	41,426	60,873
2029	20,247	41,826	62,073
2030	20,547	42,126	62,673
2031	20,154	42,126	62,380
2032	18,862	42,018	60,788
2033	16,562	41,618	58,288
<b>Total (2025-2033)</b>	<b>226,807</b>	<b>371,795</b>	<b>598,625</b>

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)

<sup>13</sup> Labour loss includes retirements, mortality and emigration



### 4.3.2 Economic Impact

**Figure 45** and **Table 33** present forecasted Gross Domestic Product (GDP) generated by Canada's infrastructure sector from 2023 to 2033, showing a strong, steady increase in economic output over the next decade. GDP for the infrastructure sector is projected to rise from approximately \$168.3 billion in 2023 to \$198.9 billion by 2033. This consistent upward trend reflects ongoing investment in construction, transportation systems, utilities, and public works, components that are foundational to national economic growth and long-term productivity.

Key economic impact trends shown in the data include:

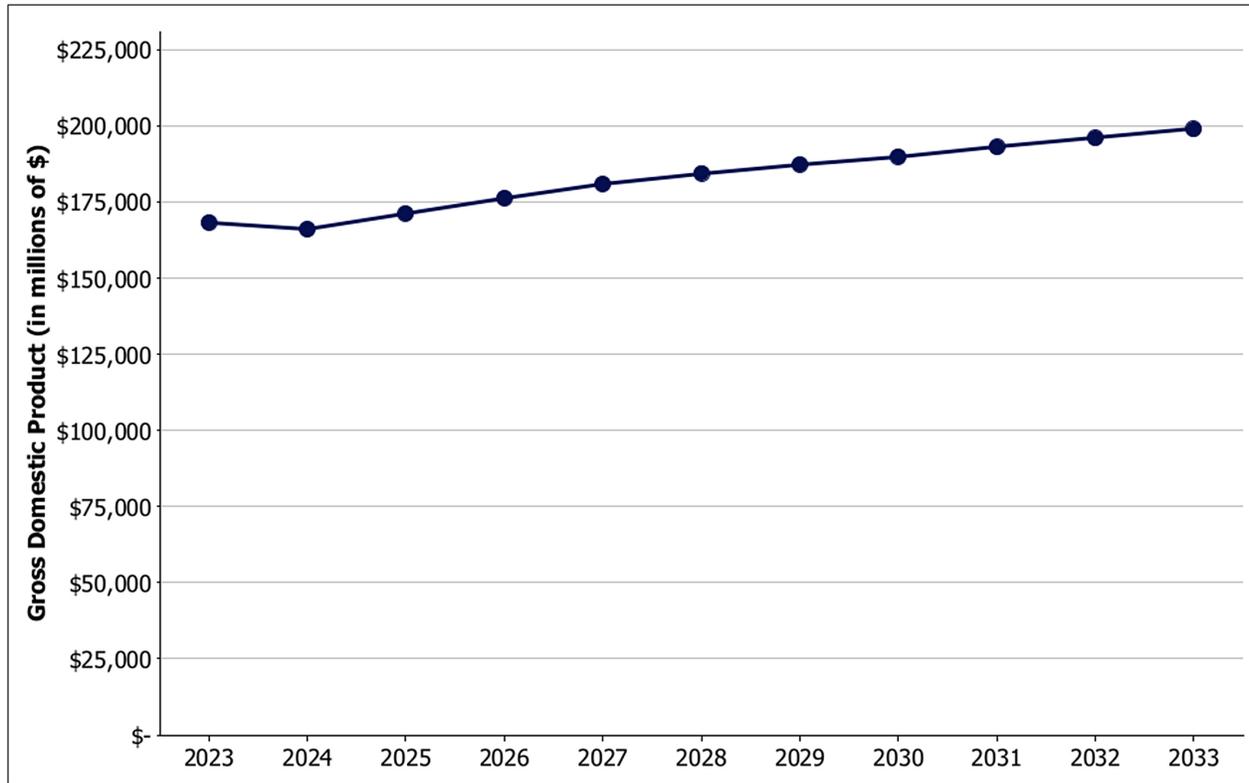
- Infrastructure GDP is forecast to grow by \$30.6 billion between 2023 and 2033, representing an 18.2% increase, which is slightly below the 19.1% growth projected across all industries.
- GDP dipped modestly in 2024, followed by a clear and sustained upward trajectory beginning in 2025, indicating stable sectoral performance after a short-term adjustment.
- Year-over-year growth remains steady from 2026 onward, with gains of roughly \$3-4 billion per year, reflecting continued public-sector investment and private-sector demand for infrastructure development.
- Infrastructure maintains a substantial economic footprint, contributing close to \$200 billion annually by the end of the forecast period, solidifying its role as a major driver of Canada's productive capacity.
- Growth in infrastructure GDP aligns with national policy priorities, including housing expansion, climate-resilient infrastructure, transportation upgrades, and modernization of essential public utilities.

Overall, the forecast demonstrates that Canada's infrastructure sector will continue to generate substantial and steadily increasing economic value through 2033. Although sectoral GDP growth is slightly below the national average, the infrastructure sector remains a cornerstone of the Canadian economy, supporting long-term competitiveness, enabling broader economic activity, and driving regional development across the country.



**Figure 45: Forecasted Industry GDP, Infrastructure, Canada, 2023-2034 (in millions of dollars)**

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)



**Table 33: Forecasted Industry GDP, Infrastructure, Canada, 2023-2034 (in millions of dollars)**

Industry	2023	2033	2023 - 2033 Growth (#)	2023 - 2033 Growth (%)
Infrastructure	\$168,253	\$198,855	\$30,602	18.2%
All Industries	\$2,202,428	\$2,623,109	\$420,681	19.1%

Source: (Government of Canada, 2025), (Avaanz Ltd., 2025)



### 4.4 Projections of First Nations involvement

This section discusses the role of the First Nation labour force in supporting Canada's natural resource and infrastructure sectors. It highlights how a young and expanding workforce, strong geographic alignment with major project areas, and increasing participation in skilled and technical occupations position First Nation workers as a critical source of talent for industries facing persistent labour shortages. The section also outlines the opportunities for enhancing workforce capacity, advancing training and employment pathways, and strengthening economic reconciliation through greater inclusion of First Nation workers in project development and delivery.

Tables and figures below present estimates of projected growth of the First Nation labour force and its potential to support future workforce requirements in the natural resources and infrastructure sectors. The analysis includes forecasts of labour force expansion across all regions, outlining expected increases in overall participation. It also presents projected First Nation employment in both sectors, demonstrating consistent growth in sector-specific workforce contributions over the coming decade. In addition, the sections provide estimates of First Nation related gross domestic product associated with natural resources and infrastructure activities, illustrating the economic value generated through this participation. Collectively, these components offer a comprehensive outlook on how the expanding First Nation labour force can help address emerging labour needs in sectors that are central to long-term economic development.

#### 4.4.1 Labour Supply

**Figures 46-48** and **Table 34** present forecasted First Nation labour force levels in Canada from 2021 to 2041 under two growth scenarios: one assuming participation rates remain unchanged from 2021, and a second applying a medium-growth scenario reflecting gradual increases in participation. Both scenarios show sustained growth in the First Nation labour force over the 20-year period, with the medium-growth scenario projecting a faster and more substantial expansion. These projections offer important context for understanding future labour supply conditions in Canada, particularly in relation to the rising workforce demands in natural resources and infrastructure over the coming decades.

Key trends emerging from the forecast include:

- Under the unchanged participation rate scenario, the national First Nation labour force is projected to increase from 548,308 in 2021 to 769,437 by 2041, representing an increase of more than 221,000 individuals over two decades.
- Under the medium-growth scenario, the labour force expands more rapidly, rising from 548,308 in 2021 to 888,198 by 2041, an increase of nearly 340,000 individuals and approximately 120,000 more workers than the unchanged-participation scenario.
- Growth occurs across every region, with Ontario, the Prairies, and British Columbia contributing the largest absolute increases under both scenarios, reflecting higher population bases and strong demographic momentum.



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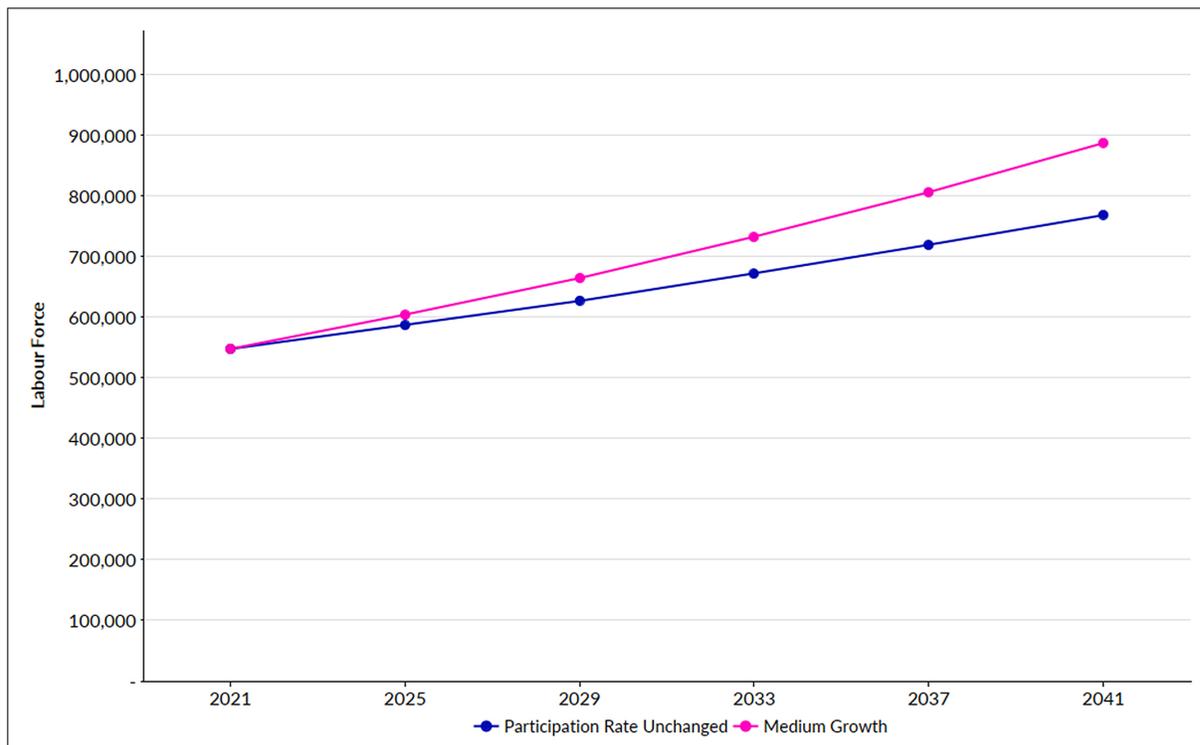
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- The Territories exhibit the fastest proportional growth, particularly under the medium-growth scenario, where the labour force nearly doubles between 2021 and 2041, reflecting rapid demographic expansion in northern regions.
- Differences between the two scenarios widen over time, with the medium-growth scenario producing progressively larger labour force gains, highlighting the long-term economic impact of increasing participation rates.
- By 2041, the medium-growth scenario produces a labour force that is approximately 15% larger than the unchanged-participation scenario, providing a significantly greater pool of potential workers relative to baseline conditions.

Overall, these projections show that the First Nation labour force is expected to grow steadily over the next two decades, with even stronger gains under a scenario where participation rates rise gradually. When considered alongside the substantial labour replacement needs and expansion demands in natural resources and infrastructure, these forecasts highlight the importance of increasing workforce participation to help meet Canada's future labour requirements. The two scenarios presented here provide a foundation for assessing how different participation trajectories could enhance national labour supply and support sectors facing ongoing labour shortages.

**Figure 46: Forecasted First Nation Labour Force by Grow Scenario, Canada, 2021-2041**

Source: (INDSPIRE, 2023), (Avaanz Ltd., 2025)





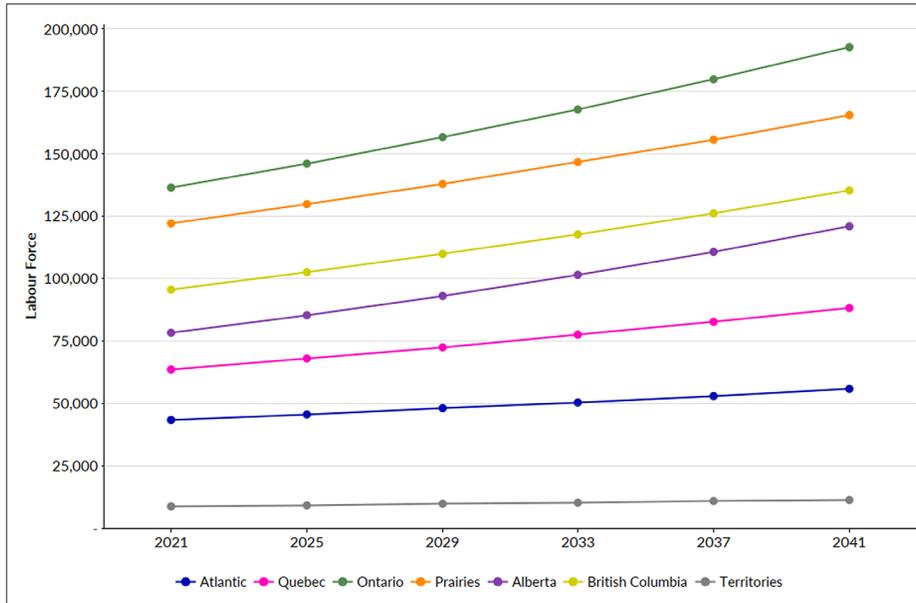
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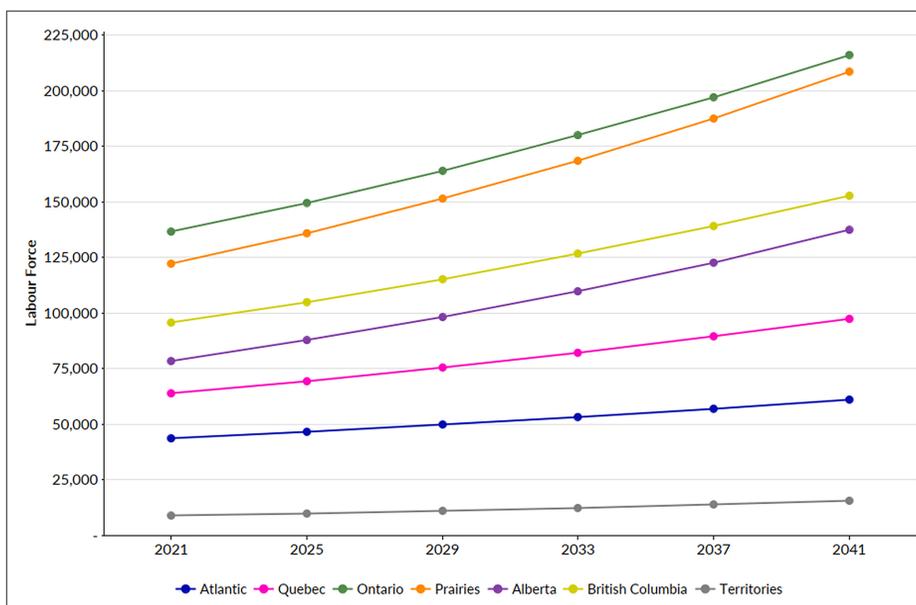
**Figure 47: Forecasted First Nation Labour Force (Participation Rate Unchanged), Regional, 2021-2041**

Source: (INDSPIRE, 2023), (Avaanz Ltd., 2025)



**Figure 48: Forecasted First Nation Labour Force (Medium Growth Scenario), Regional, 2021-2041**

Source: (INDSPIRE, 2023), (Avaanz Ltd., 2025)





**Table 34: Forecasted First Nation Labour Force, Regional, 2021-2041**

Growth Method	Region	2016	2020	2022	2033	2037	2041
Participation Rate Unchanged	Atlantic	43,427	45,652	47,991	50,450	53,034	55,751
	Quebec	63,673	67,948	72,510	77,379	82,575	88,119
	Ontario	136,448	146,190	156,629	167,812	179,795	192,632
	Prairies	122,157	129,812	137,947	146,593	155,780	165,543
	Alberta	78,331	85,424	93,159	101,594	110,793	120,825
	British Columbia	95,562	102,441	109,815	117,719	126,193	135,276
	Territories	8,709	9,173	9,662	10,177	10,719	11,290
	Canada	548,308	586,641	627,713	671,724	718,888	769,437
Medium Growth	Atlantic	43,427	46,486	49,760	53,265	57,017	61,033
	Quebec	63,673	69,296	75,417	82,077	89,326	97,215
	Ontario	136,448	149,590	163,997	179,793	197,109	216,094
	Prairies	122,157	135,938	151,278	168,352	187,358	208,514
	Alberta	78,331	87,624	98,020	109,648	122,656	137,208
	British Columbia	95,562	104,947	115,253	126,571	139,001	152,651
	Territories	8,709	9,772	10,963	12,300	13,800	15,483
	Canada	548,308	603,653	664,688	732,007	806,268	888,198

Source: (INDSPIRE, 2023), (Avaanz Ltd., 2025)

### 4.4.2 Natural Resources

**Figure 49** and **Table 35** present forecasted First Nation employment in the natural resources sector across Canadian provinces and territories from 2023 to 2033, showing steady employment growth in every region. National First Nation employment in natural resources is projected to rise from 21,145 workers in 2023 to 26,905 workers by 2033, an increase of 5,760 positions. This expansion reflects continued participation of Indigenous workers in resource-based industries such as mining, forestry, energy, and related support services, and it highlights the growing economic footprint of First Nation labour across all regions.



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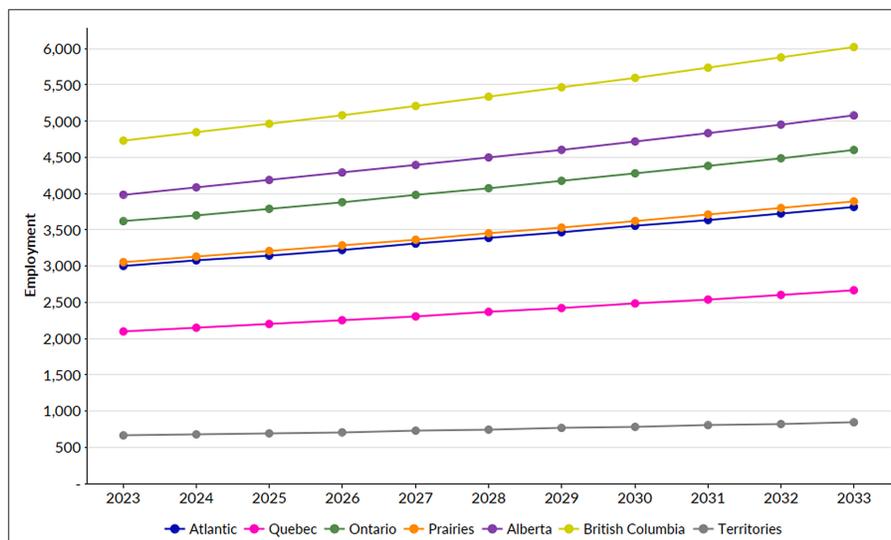
Key trends emerging from the forecast include:

- Employment increases in all regions, with growth ranging from 180 additional workers in the Territories to 1,289 in British Columbia, illustrating widespread expansion regardless of geographic context.
- British Columbia, Alberta, and Ontario see the largest absolute employment gains, together accounting for more than 3,300 new positions, over half of all projected national growth.
- Strong growth is observed in Alberta and B.C., where employment is expected to rise by 1,086 and 1,289 workers, respectively, reflecting the concentration of large-scale mining, energy, and forestry operations in these provinces.
- Atlantic Canada and the Prairies both show moderate but consistent increases, adding 818 and 833 workers, respectively, over the 10-year period.
- Quebec shows the smallest provincial increase (571 workers) but still maintains steady upward momentum, indicating continued participation in forestry, hydroelectric development, and mining activities.
- Territorial employment grows from 660 to 840 workers, a meaningful increase given the smaller population base and the prominence of mining and resource-development projects in the North.
- National First Nation employment in natural resources grows by 27% between 2023 and 2033, outpacing overall population growth in many regions and reinforcing the sector's importance as an ongoing source of labour market opportunity.

Overall, the forecast indicates strong and sustained growth in First Nation employment within Canada's natural resources sector through 2033. As participation rises across all provinces and territories, these trends point to an expanding Indigenous presence in resource-based industries, providing a growing pool of skilled and regionally distributed labour. When considered alongside the broader labour force pressures facing natural resources and infrastructure sectors nationally, these projections underscore the potential of this expanding workforce to contribute meaningfully to meeting future labour demand.

**Figure 49: Forecasted First Nation Employment, Natural Resources, Regional, 2023-2033**

Source: (INDSPIRE, 2023), (Government of Canada, 2025), (Avaanz Ltd., 2025)





**Table 35: Forecasted First Nation Employment, Natural Resources, Regional, 2023-2033**

Region	2023	2028	2033	2023 - 2033 Change (#)
Atlantic	3,002	3,386	3,820	818
Quebec	2,096	2,365	2,668	571
Ontario	3,615	4,077	4,600	985
Prairies	3,058	3,450	3,892	833
Alberta	3,988	4,498	5,074	1,086
British Columbia	4,731	5,335	6,019	1,289
Territories	660	745	840	180
Canada	21,145	23,849	26,905	5,760

Source: (INDSPIRE, 2023), (Government of Canada, 2025), (Avaanz Ltd., 2025)

**Figure 50** and **Table 36** present forecasted First Nation-related Gross Domestic Product (GDP) generated in the natural resources sector across Canadian provinces and territories from 2023 to 2033, showing consistent economic growth in every region. National First Nation related GDP in natural resources is projected to increase from \$3.98 billion in 2023 to \$5.06 billion by 2033, an overall rise of \$1.08 billion. This expansion reflects the ongoing participation of First Nation workers and businesses in mining, forestry, energy production, and related support activities, and highlights the sector’s significance as a source of economic opportunity.

Key trends emerging from the forecast include:

- Every region experiences positive GDP growth, with gains ranging from \$25.6 million in the Territories to \$266.0 million in Alberta, illustrating broad-based increases across the sector.
- Alberta shows the largest absolute growth, rising from \$976.6 million in 2023 to \$1,242.6 million in 2033, driven by strong participation in energy development, extraction activities, and resource supply chains.
- The Prairies and British Columbia also experience substantial increases, adding \$198.1 million and \$211.2 million respectively, reflecting ongoing activity in mining, forestry, oil and gas, and related industries.
- Ontario records a strong increase of \$181.9 million, supported by mining development and forestry activities across northern regions of the province.
- Atlantic Canada and Quebec both see steady and meaningful growth, increasing by \$112.0 million and \$88.6 million respectively, reflecting participation in fisheries, forestry, and mineral development.
- The Territories, while representing the smallest total GDP contribution, still grow from \$93.9 million to \$119.5 million, underscoring the importance of resource-based development in northern communities.
- National First Nation-related GDP in natural resources increases by 27% between 2023 and 2033, closely aligning with the projected rise in First Nation employment within the sector.



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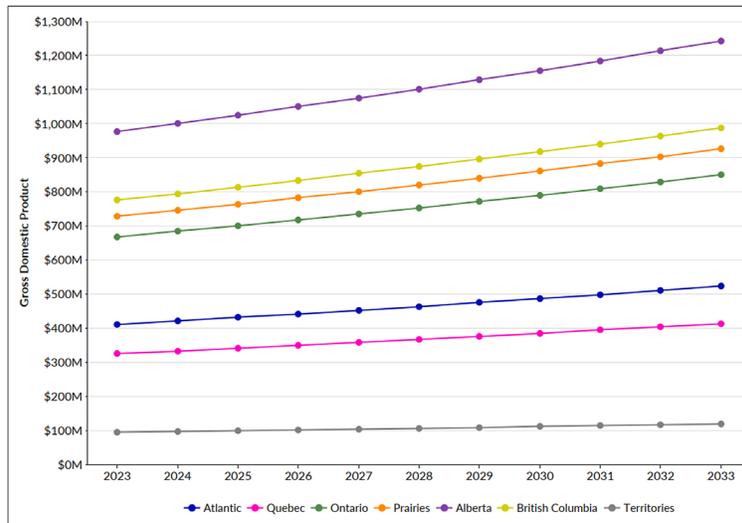
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Overall, these projections show that First Nation-related GDP in the natural resources sector will grow steadily through 2033, reinforcing the sector's continued importance as a driver of economic activity and opportunity. As natural resource development remains central to regional economies across Canada, the increasing economic contributions reflected in this forecast highlight the expanding role of First Nation workers and businesses in supporting long-term sectoral growth.

**Figure 50: Forecasted First Nation Related Gross Domestic Product, Natural Resources, Regional, 2023-2033**

Source: (Statistics Canada, 2025), (INDSPIRE, 2023), (Government of Canada, 2025), (Avaanz Ltd., 2025)



**Table 36: Forecasted First Nation Related Gross Domestic Product, Natural Resources, Regional, 2023-2033**

Region	2023	2028	2033	2023 - 2033 Change (#)
Atlantic	3,002	3,386	3,820	818
Quebec	2,096	2,365	2,668	571
Ontario	3,615	4,077	4,600	985
Prairies	3,058	3,450	3,892	833
Alberta	3,988	4,498	5,074	1,086
British Columbia	4,731	5,335	6,019	1,289
Territories	660	745	840	180
<b>Canada</b>	<b>21,145</b>	<b>23,849</b>	<b>26,905</b>	<b>5,760</b>

Source: (Statistics Canada, 2025), (INDSPIRE, 2023), (Government of Canada, 2025), (Avaanz Ltd., 2025)



### 4.4.3 Infrastructure

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**Figure 51** and **Table 37** present forecasted First Nation employment in the infrastructure sector across Canadian provinces and territories from 2023 to 2033, showing strong and consistent growth across all regions. Nationally, First Nation employment in infrastructure-related occupations is projected to increase from 39,499 workers in 2023 to 50,258 workers by 2033, an overall gain of 10,759 workers. This growth reflects the steady expansion of construction, transportation, utilities, and public works activities across the country, and highlights increasing First Nation participation in occupations critical to meeting Canada’s long-term infrastructure needs.

Key trends emerging from the forecast include:

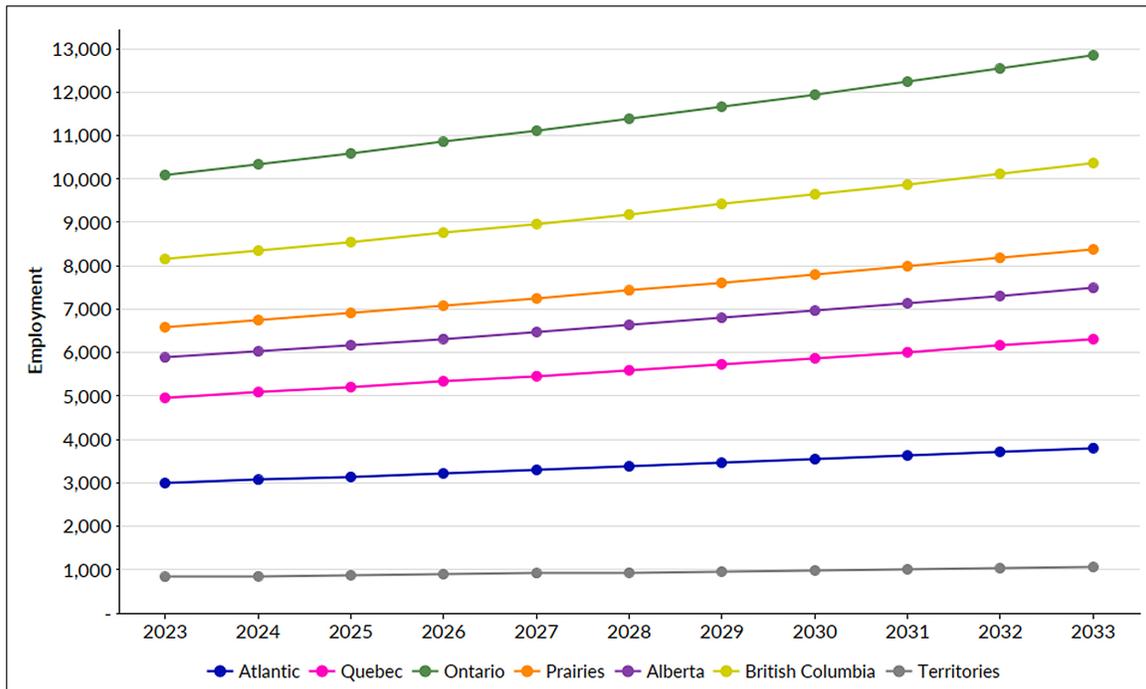
- Employment grows in every region, with increases ranging from 226 workers in the Territories to 2,749 workers in Ontario, demonstrating widespread participation and growth across the national labour market.
- Ontario, British Columbia, and the Prairies show the largest absolute gains, contributing a combined total of more than 6,700 additional workers, nearly two-thirds of all projected national growth.
- Ontario experiences the strongest growth overall, increasing from 10,093 in 2023 to 12,842 in 2033, consistent with the province’s substantial infrastructure investment needs and large population base.
- British Columbia and the Prairies both show significant upward trends, adding 2,219 and 1,793 workers respectively, reflecting investments in transportation, utilities, housing, and public works across western Canada.
- Quebec and Alberta also see steady increases, with projected gains of 1,352 and 1,602 workers, supported by ongoing infrastructure development across both provinces. The Territories experience proportional but meaningful growth, with employment rising from 829 to 1,055 workers by 2033.
- National First Nation employment in infrastructure is projected to grow by 27% between 2023 and 2033, a strong rate of increase that aligns with rising labour requirements across Canada’s infrastructure sector.

Overall, the forecast indicates that First Nation employment in Canada’s infrastructure sector will continue to grow steadily through 2033, with every region contributing to national gains. This expansion reflects increasing opportunities within construction and infrastructure-related occupations and provides a foundation for understanding how First Nation participation can help support future workforce needs. When considered alongside the broader labour force pressures facing Canada’s infrastructure sector, where replacement demand and expansion needs remain significant, these projections underscore the growing importance of this segment of the labour force in supporting long-term infrastructure development across the country.



**Figure 51: Forecasted First Nation Employment, Infrastructure, Regional, 2023-2033**

Source: (INDSPIRE, 2023), (Government of Canada, 2025), (Avaanz Ltd., 2025)



**Table 37: Forecasted First Nation Employment, Infrastructure, Regional, 2023-2033**

Region	2023	2028	2033	2023 - 2033 Change (#)
Atlantic	2,991	3,374	3,806	815
Quebec	4,963	5,597	6,314	1,352
Ontario	10,093	11,383	12,842	2,749
Prairies	6,583	7,425	8,377	1,793
Alberta	5,880	6,631	7,481	1,602
British Columbia	8,147	9,189	10,366	2,219
Territories	829	935	1,055	226
<b>Canada</b>	<b>39,499</b>	<b>44,549</b>	<b>50,258</b>	<b>10,759</b>

Source: (INDSPIRE, 2023), (Government of Canada, 2025), (Avaanz Ltd., 2025)



### 4.4.4 Economic Impact

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**Figure 52** and **Table 38** present forecasted First Nation-related Gross Domestic Product (GDP) generated in the infrastructure sector across Canadian provinces and territories from 2023 to 2033, showing strong and sustained economic growth in every region. National First Nation-related GDP in the sector is expected to rise from \$3.91 billion in 2023 to nearly \$4.97 billion by 2033, an increase of \$1.07 billion. This upward trend reflects continued First Nation participation in construction, transportation, utilities, and public works activities, and expanding infrastructure investment across the country.

Key trends emerging from the forecast include:

- All regions experience meaningful GDP growth, with increases ranging from \$22.0 million in the Territories to \$270.1 million in Alberta, highlighting widespread contributions to the sector's economic output.
- Alberta generates the largest absolute increase, rising from \$991.6 million in 2023 to \$1.26 billion in 2033, driven by extensive energy infrastructure, urban expansion, and large-scale construction activity.
- The Prairies and Ontario also show significant gains, increasing by \$185.5 million and \$174.2 million respectively, consistent with major infrastructure needs across transportation, utilities, and housing.
- British Columbia sees a strong increase of \$196.2 million, supported by continued development in transportation, port infrastructure, energy distribution, and urban growth.
- Atlantic Canada and Quebec experience steady growth, adding \$127.9 million and \$89.0 million respectively, reflecting ongoing regional investments in public works, transportation systems, and community infrastructure.
- The Territories generate the smallest but still meaningful increase, rising from \$80.9 million to \$102.9 million, emphasizing the economic relevance of infrastructure development in northern and remote regions.
- National First Nation-related GDP in infrastructure grew by 27% over the decade, closely paralleling forecasted increases in First Nation employment and labour force participation in the sector.

Overall, the forecast shows that First Nation-related economic contributions to the infrastructure sector will continue to expand across all regions through 2033. As infrastructure investment grows nationwide, First Nation workers and businesses are projected to generate an increasing share of the sector's economic output. When considered alongside the sector's rising labour demand and Canada's broader infrastructure needs, these GDP projections highlight the continued and growing importance of First Nation participation in supporting the long-term development of essential public and economic infrastructure across the country.



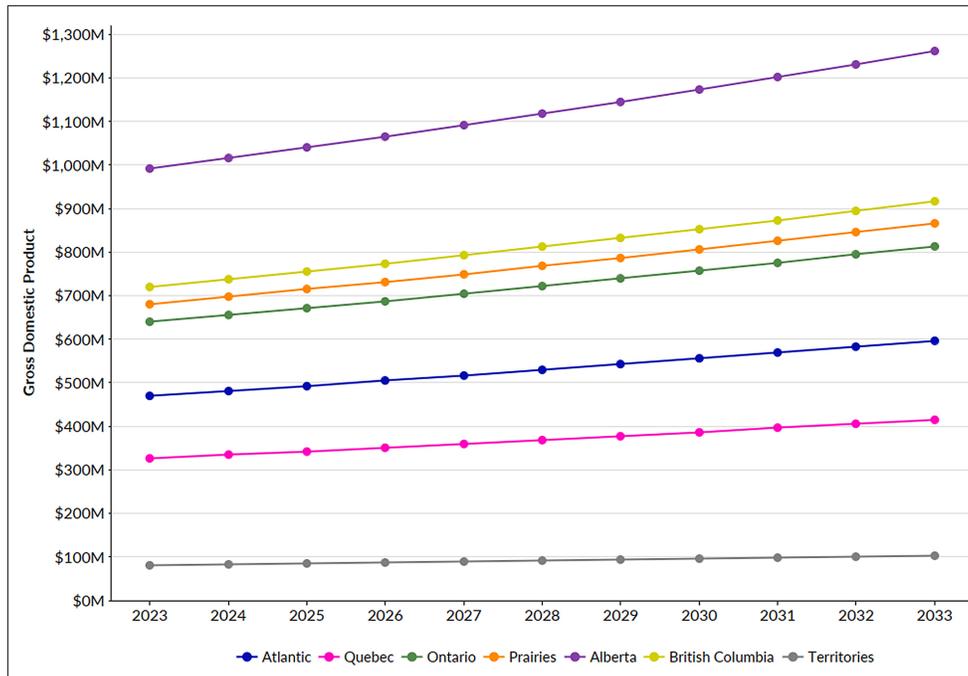
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**Figure 52: Forecasted First Nation Related Gross Domestic Product, Infrastructure, Regional, 2023-2033**

Source: (Statistics Canada, 2025), (INDSPIRE, 2023), (Government of Canada, 2025), (Avaanz Ltd., 2025)



**Table 38: Forecasted First Nation Related Gross Domestic Product, Infrastructure, Regional, 2023-2033**

Region	2023	2028	2033	2023 - 2033 Change (#)
Atlantic	\$469.4	\$529.4	\$597.3	\$127.9
Quebec	\$326.7	\$368.5	\$415.7	\$89.0
Ontario	\$639.7	\$721.5	\$813.9	\$174.2
Prairies	\$681.1	\$768.2	\$866.7	\$185.5
Alberta	\$991.6	\$1,118.4	\$1,261.7	\$270.1
British Columbia	\$720.4	\$812.5	\$916.6	\$196.2
Territories	\$80.9	\$91.2	\$102.9	\$22.0
<b>Canada</b>	<b>\$3,909.8</b>	<b>\$4,409.8</b>	<b>\$4,974.8</b>	<b>\$1,065.0</b>

Source: (Statistics Canada, 2025), (INDSPIRE, 2023), (Government of Canada, 2025), (Avaanz Ltd., 2025)



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## 5. Paths for First Nations to Achieve Greater Participation and Prosperity in Natural Resources and Infrastructure Sectors

Modelled forecasts of the involvement of First Nations in the natural resources and infrastructure sectors cannot, on their own, explain how levels of First Nations involvement will be reached. For example, forecasts of First Nations GDP assume that the components that fuel GDP growth – production, investment, and employment – will raise First Nations GDP in the future.

Increases of First Nations participation and prosperity in the natural resources and infrastructure sectors depend on the continued commitment to economic reconciliation. More specifically, increases to First Nations participation and prosperity in the natural resources and infrastructure sectors depend on (1) the removal of systemic barriers that exclude First Nations from economic opportunities, and (2) the building of capacity for First Nations economic self-determination. These two objectives are intertwined. Economic opportunities can be squandered if First Nations lack the means to fully participate. On the other hand, strong economic capacity is difficult to build if systemic barriers keep marginalizing First Nations from investment, business development, or other economic activities.

### 5.1 Removal of systemic barriers

The removal of systemic barriers is critical to the growth of First Nations economic self-determination. Systemic barriers of employment, investment, and access intensify economic inequalities between non-Indigenous people and First Nations. They also make pathways to economic reconciliation that are much steeper. For example, Figure 53 shows how, in almost every sector, there are significant gaps between the average incomes of First Nations and non-Indigenous people. These gaps need to close in the pursuit of economic reconciliation; but closure of these gaps demand that Canada strives to remove the systemic barriers that created these gaps in the first place.





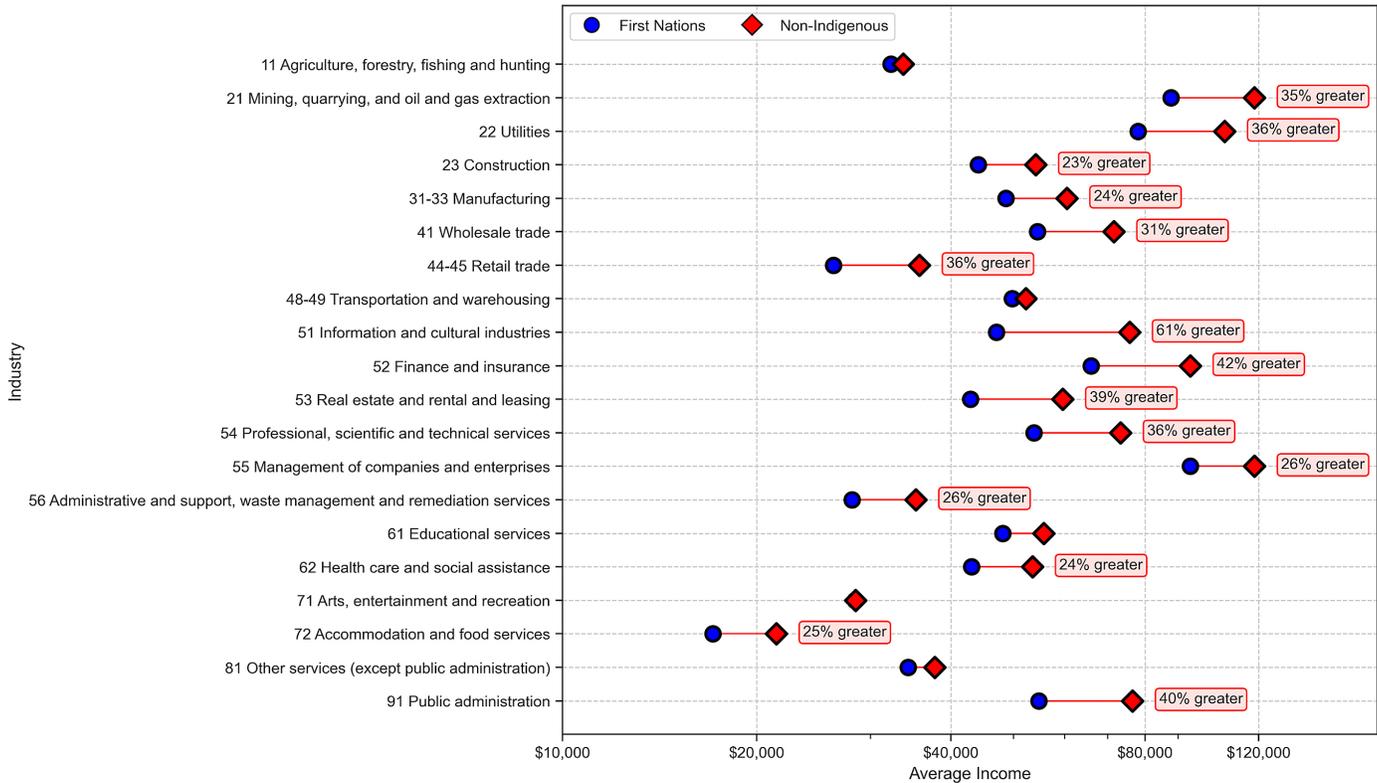
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**Figure 53: Differences in average income in Canada, by industry**

Source: (Statistics Canada, 2023)



### 5.1.1 Barriers in employment

The underrepresentation of First Nations in certain fields or jobs is an effect of First Nations lacking opportunities for education and skills development (OECD, 2020). In-community education and training can be particularly difficult for remote First Nations that have insufficient infrastructure, technology, and other equipment for specialized programs.

Participants of the Economic Workshop spoke of the benefits of community-driven mentorship and tailored technical and apprenticeship programs. The education and employment goals of First Nations are unlikely to be met when programs and initiatives are delivered in a top-down fashion, often through a “one-size-fits-all” model (McDonald & Raderschall, 2019).

Barriers in employment can persist even when there are employment opportunities for a specific natural resource or infrastructure project. Natural resource and infrastructure projects will often hire First Nations lower-rank positions, provide temporary or part-time employment, or fail to adjust employment opportunities to community needs – e.g., cultural leave for ceremony. Community-driven education, apprenticeships, and mentorships can give First Nations greater autonomy in pursuing the employment opportunities they desire.



### 5.1.2 Barriers in infrastructure

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The current First Nations infrastructure gap is estimated to be \$350 billion. Forcing First Nations to live and work inside this gap would be unjust, as this gap is a product of Canada's historical and ongoing neglect of the infrastructure needs of First Nations communities. The federal government does commit to some infrastructure investment, but the Crown has shown a lack of political will to close the First Nations infrastructure gap (Canadian Centre for Policy Alternatives, 2025). Barriers in infrastructure are also about the First Nation control over infrastructure (The National Indigenous Economic Development Board, 2024).

Barriers can be removed when First Nations are empowered to assume care, control, and management of infrastructure projects. Moreover, equity participation for First Nations is a way to grow First Nations capital through infrastructure investment. There are various institutions that could potentially be established to support First Nations in financing, building, and maintaining infrastructure. These might include a First Nations Infrastructure Institute, an infrastructure bank, or an investment vehicle (Canadian Centre for Policy Alternatives, 2025).

### 5.1.3 Barriers to accessing capital

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Although there are ways to further economic reconciliation without capital investment, such as by employing First Nations peoples in infrastructure and natural resource projects, access to capital investment is of critical importance to any First Nations government, community, business, and entrepreneur that is looking to leverage investment for a First Nation-owned project or partnership.

In a report to the First Nations Financial Management Board, Momentus observed that “Indigenous Governments, businesses, and entrepreneurs, both on and off reserve, do not have access to the same level of financial markets that support the mainstream economy” (Momentus, 2023, p. 3). This inequality of “access” can be understood in different ways. For instance:

- The *Indian Act* and government funding policies restrict First Nations from using certain on-reserve assets or revenue streams as collateral for financing (Momentus, 2023).
- First Nation small and medium business owners can lack the information or paperwork to meet all requirements in applications for lending.
- Indigenous firms can be much less diversified than mainstream firms in the sources of market capital. Indigenous firms overwhelmingly rely on bank loans, while mainstream firms mix bank loans with bonds, debentures, commercial paper, and other instruments (Collin & Rice, 2019).
- Access to Indigenous-owned banking, bonds, or loans can also be limited. The capital and scope of an Indigenous financial institution can struggle to compete with mainstream banks, institutions, and other capital ventures. For example, the First Nations Finance Authority has issued nine debentures, but its current coverage is still limited to 140 First Nations communities. Investment funds might also be limited to certain market segments, such as small business and startups; this type of limitation can make it difficult for First Nations to access funds for larger projects in infrastructure and housing (Momentus, 2023).



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There are signs of new opportunities for Indigenous access to capital, including through the provision of banking and finance services by Indigenous-owned or Indigenous-led organizations. For instance:

- The Bank of Montreal has established an Indigenous Advisory Council to have Indigenous council members guide the Indigenous Strategy at BMO (BMO Financial Group, 2024).
- The National Housing Co-Investment Fund has low-cost loans, contributions, and other financial tools for Indigenous housing (Momentum, 2023).
- Indigenous Financial Institutions, such as the Nishnawbe Aski Development Fund (NADF), can provide financing and support to entrepreneurs and businesses (Nishnawbe Aski Development Fund, 2024).

### 5.1.4 Barriers of law or policy

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Canadian laws and policies can obstruct or disempower First Nations in the pursuit of their economic goals. The contents of law and policies can act as formal barriers to First Nations economic goals, but so can the interpretation and application of laws or policies.

The *Indian Act* has been the largest and most fundamental legal barrier to First Nations economic self-determination (Brown, Doucette, & Tulk, 2016). Since its inception, the *Indian Act* has prevented First Nations from controlling their lands as sovereign peoples. It also has given the Canadian government several mechanisms to control or influence economic activity through Crown title and restrictions of sale.

In the current period of evolving Indigenous relations, where parts of the *Indian Act* have been repealed and the First Nations Land Management Act, 1999 (FNLMA) is an option for First Nations to adopt, legal and policy barriers can still be produced from colonial attitudes, cumbersome legal arrangements, and poorly defined or implemented policies. For example, the “Mandatory minimum 5% Indigenous procurement target” is a federal policy that has had several controversies around its benefits to Indigenous peoples. This procurement target was designed award contracts to Indigenous businesses registered on the IBD. However, the design of the IBD failed to consider where fraudulent actors could simply self-identify as Indigenous or use Indigenous partners in name only, giving non-Indigenous partners a full or majority share of the contract’s value.

## 5.2 Building of capacity for First Nations economic self-determination

Economic reconciliation with First Nations is not simply about improving statistics in employment and wages. Rather, it is about addressing historical and current processes that have prevented First Nations from pursuing economic self-determination. Building the capacity for First Nations economic self-determination in Canada does involve jobs, salaries, and other economic activity, but it also involves institutional innovation, procedural reforms, and policy changes.



There are currently several blueprints for First Nations economic self-determination. For example, the First Nations Financial Management Board (FNFMB)'s RoadMap Project sets goals to Indigenous-led economic empowerment (First Nations Financial Management Board (FNFMB), 2023). There are also examples of governments and businesses acknowledging the rights of First Nations economic self-determination in specific projects or through certain policies.

### 5.2.1 Governance and Control

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Economic self-determination is an empty concept if First Nations are unable to meaningfully decide how their lands will be used for resource extraction, development, or other purposes that could impact their communities and ways of life. The Crown currently has a Duty to Consult with Indigenous peoples on projects that could adversely affect their inherent or treaty rights, but the application of this duty to consult has demonstrated that First Nations can be consulted from a position of disadvantage, relative to the Crown or project proponent. Participants of the Economic Workshop Sessions gave several examples:

- First Nations are consulted after several project decisions have already been made. This puts pressure on First Nations to accept plans and designs that were not designed through meaningful recognition of community needs.
- Project benefits to First Nations are either short-term or do not account for community needs.
- The pace of a project can be defined by industry needs and imposed on First Nations. First Nations are pressured to move at the speed of industry but could lack the capacity to do so.
- Project plans and requirements are not always communicated in ways that all community members can understand. Extra care to plain language summaries could allow Elders and youth to meaningfully participate with better understanding of design decisions and requirements.

First Nations require better governance supports to ensure capacity to engage and manage development on their lands. This capacity can be strengthened through development of local capacity, accessing capital, and improving infrastructure. It also can be built with support for alternatives to existing structures that undermine their rights, title, and jurisdiction (Canadian Centre for Policy Alternatives, 2025).

### 5.2.2 Benefit Sharing

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The core principle of benefit sharing is that there is a social obligation to share parts of the revenues that have been generated from infrastructure and natural resource projects with local parties of interest, and Indigenous communities. Benefit sharing recognizes that local parties of interest and Indigenous communities have, historically, seen few benefits from large-scale projects that operate in and around their communities, which for Indigenous communities, extends across their traditional territory. Furthermore, benefit sharing is a way to recognize how a large-scale project can force surrounding populations to live with the broader effects of construction, operation, and project closure. The environmental and social footprints for projects like these are frequently exceptionally large and can have direct impacts on the lands that communities use for food, income, and community well-being.



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For Indigenous communities in Canada, benefit sharing is closely tied to Section 35 of the Canadian Constitution. Benefit sharing between parties is privately negotiated and agreed upon through contract, such as an impact benefit agreement (IBA), but negotiations about revenue sharing and other benefits from infrastructure and natural resource projects can be initiated with the public duty for the Crown to consult and, where appropriate, accommodate Indigenous groups that would be impacted by such projects.

The amount and types of benefits an Indigenous community will receive through benefit sharing varies by project, but certain components of benefit sharing can indicate whether Indigenous rights to self-determination are being respected. Benefit sharing can be government-controlled, which will often result in benefits being shared from revenues generated from taxes, royalties, penalties, and government fees (Raderschall, Krawchenko, & Leblanc, 2020). A government-controlled benefit sharing agreement in Canada can be a clear extension of Section 35, UNDRIP, and other laws that refer to Indigenous rights. Benefit agreements between Indigenous communities and private firms are considered voluntary, as the private initiative to benefit sharing is not required by law. There are opportunities for corporate IBAs to be fair partnerships when negotiations are built through Indigenous engagement that meaningfully respects the principles of free, prior, and informed consent (Raderschall, Krawchenko, & Leblanc, 2020). Conversely, there are risks for corporate IBAs to be unfair to Indigenous communities when they ask too much, e.g., waive inherent rights to territory, or block means to fair participation in project decisions (Conrad & Hilchey, 2011).





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## 6. Conclusion

This report forecasts that First Nation GDP in natural resources will increase from \$3.98 billion in 2023 to \$5.06 billion by 2033. First Nation GDP in the infrastructure sector is expected to rise from \$3.91 billion in 2023 to nearly \$4.97 billion by 2033. These projections are two of several forecasts that estimate increases in First Nations economic participation in the natural resources and infrastructure sectors.

These forecasts demonstrate the significant economic potential of First Nations; however, they also underscore that opportunity is far from enough for First Nations economic development to be strong. While these findings can be promoted as a success story for First Nations, new projects, jobs, and procurement opportunities, they can be undermined by systemic barriers hiding underneath. If, for example, First Nations do not have ownership or equity in natural resources and infrastructure projects, or they are not empowered to assume care, control, and management of infrastructure projects, several systemic barriers to economic participation continue to impact community development.

Economic reconciliation with First Nations demands actions that dismantle systemic barriers to Indigenous self-determination. Closing the infrastructure gap, expanding access to capital, and growing Indigenous ownership are essential and not optional. Without these actions, systemic barriers will persist and limit the full potential of First Nations economic development. Instead, if these actions are implemented alongside workforce development, meaningful engagement, and inclusive governance, they create the conditions for sustainable growth and meaningful participation in Canada's infrastructure and resource sectors.

Indigenous reconciliation is not just about the past; it is about the rights of Indigenous peoples to build their future, including through economic self-determination. With proper investments and partnerships, First Nations can transform economic potential into tangible outcomes that strengthen communities and drive shared prosperity for all.



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## 8. Report Glossary

**Economic impact:** Changes in economic activity within a region resulting from some action, such as the ongoing operation of an industry or a decision or a project.

**Gross domestic product (GDP):** Total market value of all final goods and services. The value of intermediate goods and services, which are used in the production of a good or service, is not included in GDP.

**Impact Benefit Agreements (IBAs):** Agreements between Indigenous communities and resource developers aimed to create a framework that manages project impacts (such as environmental, social, or economic) while securing benefits like employment, training, and financial compensation for the impacted community.

**Indigenous Peoples Economic Account (IEPA):** A suite of economic statistics that aims to measure the economic contribution, in terms of gross domestic income (GDI) and jobs, of Indigenous people to the Canadian economy.

**Jobs:** According to Statistics Canada, a job is defined as all tasks and duties carried out by a particular person for pay or profit, including employment and self-employment.

**North American Industry Classification System (NAICS):** Classifies economic activities by supply-side or production-oriented principles. NAICS has a hierarchical structure. At the 2-digit level, the economy is divided into 20 sectors.

Industries and their related NAICS codes that fall into the natural resource sector include:

- Agriculture, forestry, fishing, and hunting (11)
- Mining, quarrying, and oil and gas extraction (21)
- Electric power generation, transmission, and distribution (2211)
- Natural gas distribution (2212)
- Pipeline transportation (486)

Industries and their related NAICS codes that fall into the infrastructure sector include:

- Water, sewage, and other systems (2213)
- Construction (23)
- Waste management and remediation services (562)

**Output:** The measure of all sales of goods and services, both final and intermediate.



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