

*building on our energy: an update to the 10-year economic strategy for Calgary***Q3 Supplementary Indicators Update**

As of December, 2015

Global Energy

Goal: Calgary is an undisputed global energy centre. Our international reputation attracts new people, investment and businesses as we strengthen the energy value chain.

G1.1 Promote the social, environmental and innovative advancements in the energy industry	
Lead: Calgary Economic Development	
Activities & Opportunities	Calgary Economic Development has appointed Megan Zimmerman as Business Development Manager for Clean Technology and Renewable Energy. They also joined Energy Futures Lab – a group of innovators and influencers that will explore and collectively address current and future energy challenges.
Challenges	While Calgary Economic Development (CED) has convened stakeholders to discuss changing perceptions of Alberta, stakeholders have not been convened to target renewable energy and environmental conferences to Calgary
Supplementary Indicators Data	<ul style="list-style-type: none"> 63% of Canadians believe oil and gas industry provides benefits for the whole country (2013 Canada West Foundation) 37% believe oil and gas balances economic growth with protecting the environment (2013 Canada West Foundation)

G2.1: Collaborate to enhance the effectiveness of international investment and trade missions	
Lead: Calgary Economic Development	
Activities & Opportunities	<ul style="list-style-type: none"> Government of Alberta (GoA) has consolidated trade and investment efforts into the Ministry for Economic Development and Trade providing one point of access for CED. Relationships with Consider Canada City Alliance (CCCA) have been strengthened – CED has participated in 2 CCCA (China and Europe) and 1 Nexen sponsored missions to China 2015. CED played a support role for GoA mission to Middle East in December. Held conversations about collaborating on trade and investment efforts with Edmonton Economic Development.
Challenges	Changing economic fundamentals diminish Calgary's advantages for attracting business investment.
Supplementary Indicator Data	<ul style="list-style-type: none"> 2014 assisted 23 businesses to relocate, expand or invest in Calgary generating 2,379 jobs 1 head office relocation to Calgary in 2015



G2.2: Collaborate with high growth energy-related industries to maximize investment and trade opportunities	
Lead: Calgary Economic Development	
Activities & Opportunities	Government of Alberta and Government of Canada have expressed interest in expanding the Federal Sector Initiatives Fund to include tech and agriculture.
Challenges	None identified
Supplementary Indicator Data	<ul style="list-style-type: none"> 21 inbound trade missions hosted in 2015 vs 16 in 2014

Entrepreneurial Energy

Goal: The Calgary Region is a magnet for businesses fostering pathways to purposeful economic diversification and growth.

E1.1: Make Calgary more competitive and maximize growth opportunities by increasing local intelligence outreach	
Lead: Calgary Economic Development	
Activities & Opportunities	CED has completed the pilot year of a Business Retention and Expansion program. The process has expanded CED's business networks and information gathered assists in identifying growing businesses.
Challenges	CED is reorganizing to better support local businesses and Calgary's real estate plays understanding that the existing structure did not position CED well to do so.
Supplementary Indicator Data	259 business retention and expansion surveys conducted

E1.2: Build financial services capacity to grow and attract financial institutions (banks, fund management, investment firms, private equity).	
Lead: Calgary Economic Development	
Activities & Opportunities	Calgary is participating in a Conference Board Of Canada financial services sector research study with Advantage BC, Toronto Financial Services Alliance and Finance Montreal.
Challenges	<ul style="list-style-type: none"> Financial Services Advisory Council has not reconvened – planning underway GFCI is a pay to play survey – if you don't pay for the study your ranking continues to slide
Supplementary Indicator Data	<ul style="list-style-type: none"> 17 global investment banks have a presence in Calgary Employment in financial services sector 29,300 Global Financial Centres Index (GFCI) ranking 39 down from 17 in March 2014



E1.3: Maintain a sufficient, available supply of future industrial and employment land for development within Calgary and the region	
Lead: Calgary Regional Partnership and The City of Calgary	
Activities & Opportunities	The Calgary Regional Partnership and the City of Calgary are initiating an industrial land mapping project. Maps have been generated for Airdrie and are scheduled for Cochrane, Chestermere, Strathmore and Okotoks.
Challenges	<ul style="list-style-type: none"> The second largest land inventory in the region – Rockyview County does not participate in the Calgary Regional Partnership. The slowing economy has reduced the pace of land absorption and the demand for industrial land
Supplementary Indicator Data	<ul style="list-style-type: none"> Cost of land in Calgary region is the lowest among 10 peer cities at \$14/ft² Industrial land data/maps for the region is being gathered

E1.4: Solidify the region's position as western Canada's premiere distribution and logistics hub	
Lead: Calgary Economic Development and Calgary Regional Partnership	
Activities & Opportunities	<ul style="list-style-type: none"> Federal funds available for marketing Calgary as a Foreign Trade Zone and Inland Port– designations achieved through collaboration between CED, Calgary Regional Partnership, industry associations and the private sector. Logistics Advisory Council – private sector with brokerage and development sector representation to match opportunities for leasing and development. Calgary's T&L sector has been a driver in job growth through 2015
Challenges	<ul style="list-style-type: none"> Calgary Logistics Council lacks resources to take full advantage of the Calgary Inland Port brand
Supplementary Indicator Data	<ul style="list-style-type: none"> 55 daily international departure flights – 6th among 10 peer cities (2015) 5,170 transportation and logistics (T&L) companies in Calgary (2014) 78,700 employed in T&L (2014)

E1.5: Grow the creative industries and the digital economy	
Lead: Calgary Economic Development	
Activities & Opportunities	<ul style="list-style-type: none"> The Calgary Film Centre is a marquee project in this sector – to be open in 2016. The City of Calgary is creating a Cultural Plan for Calgary that will yield additional opportunities for the creative sector.
Challenges	Film and Television is a very competitive industry with many other jurisdictions offering considerable incentives to attract production. Alberta's cap on incentives make is more difficult to attract larger budget productions.
Supplementary Indicator Data	<ul style="list-style-type: none"> 6 major projects (2015) up from 5 (2014) \$160 of film activity (2014) 10,500 employed in film and television



	<ul style="list-style-type: none"> 50,400 employed in creative industries
E1.6: Grow tourism through enhanced local attractions and better collaboration with world-class regional destinations.	
Lead: Tourism Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> Tourism Calgary (TC) launched 3-year corporate strategy to develop the destination, ensure organizational excellence, generate incremental visitation and spend and energize the Calgary Brand. TC to develop a Destination Strategy in 2016 to identify product gaps and investment potential building on Calgary's role as a regional destination, gateway to Banff and a business centre. In 2016 TC to partner with Calgary Arts Development and others to market Calgary's Year of Music.
Challenges	<ul style="list-style-type: none"> 2015 is seeing declining hotel bookings due to decline in business traffic. Low Canadian dollar is an advantage but not against other destinations in Canada.
Supplementary Indicator Data	<ul style="list-style-type: none"> 8,026,153 visitors (2014) 15.26 million passengers at YYC (2014) 6.3% revenue growth (2014) 3,184,632 hotel nights (2014) 48,142 sport-related hotel nights (2014) record 59 culture and sport bids won (2014) 559 corporate/industry partners confirmed with Tourism Calgary (2014) <p>Other indicators being gathered – Tourism Calgary and Calgary Arts Development will conduct research into perceptions of Calgary as an arts and culture destination.</p>

E1.7 Support opportunities emerging from agriculture and bio-industries in support of a healthy regional economy. (new)	
Lead: Calgary Economic Development	
Activities & Opportunities	<ul style="list-style-type: none"> CED hosted the first meeting of a new Agriculture Business Advisory Committee. Build on Alberta's reputation for high quality agricultural products and District Ventures, a consumer packaged goods/food value add business accelerator, to assist firms in commercializing and exporting new food products from Calgary.
Challenges	This is a new industry for CED. This increases the risk in supporting trade and investment in the area.
Supplementary Indicator Data	<ul style="list-style-type: none"> 147 Food manufacturing businesses in Calgary (2014)



E2.1: Support continued improvement in development approvals and red-tape reduction initiatives	
Lead: The City of Calgary	
Activities & Opportunities	Calgary's Red Tape Reduction Initiative completed initial project and is being reorganized into Analytics Calgary.
Challenges	The relationship between The City of Calgary Planning Development and Assessment and CED needs to be formalized to streamline the development permit application process.
Supplementary Indicator Data	<ul style="list-style-type: none"> • 45 initiatives were completed during the project. • 22 initiatives were not feasible within the timeframe.

E2.3: Develop pathways to entrepreneurship for future leaders and youth	
Lead: Post-secondary Institutions	
Activities & Opportunities	<ul style="list-style-type: none"> • Entrepreneurial programming in place in all post-secondary institutes in Calgary. • Calgary's post-secondary institutes operate somewhat independently and there may be opportunity to collaborate on a marquee event – a high school pitch event that would raise awareness of entrepreneurship as a career option. • Programs are being developed and implemented to incorporate entrepreneurial training throughout the campus at University of Calgary, Mount Royal University and Calgary Arts Development.
Challenges	Secondary boards of education have not yet been contacted with respect to the Economic Strategy for Calgary, however, there is the opportunity to do so.
Supplementary Indicator Data	Not yet collected

Innovative Energy

Goal: Calgary fosters a culture of innovation where problems are solved through a systems approach, harnessing the power of technology.

I1.1: Establish and strengthen linkages between the energy and technology sectors	
Lead: Innovate Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> • Innovate Calgary, in partnership with CED launched Kinetica – to date results are exceeding expectations and Kinetica has been instrumental in strengthening industry relationships and partnerships. • New Provincial and Federal Governments are focusing on innovation and commercialization in diversifying and strengthening the economy. • Continued collaboration with CED which has been able to leverage networks in acting as a catalyst for Kinetica's activities.



Challenges	<ul style="list-style-type: none"> The Energy New Ventures Initiative did not expand in 2015 given economic challenges faced by the energy sector, however, relationships with COSIA are strong and the initiative is still active. Economic challenges faced by the energy sector are making it more difficult to secure funding for research, commercialization and accelerator activities.
Supplementary Indicator Data	Innovate Calgary will launch an energy tech market study in 2016 which will reveal the number of companies, employees and economic impact of the industry in Calgary.

I1.2: Build connections, capital flows and knowledge transfer between the energy finance and technology finance communities	
Lead: Innovate Calgary	
Activities & Opportunities	Current provincial government has directed Albert Investment Management Corporation (AIMCo) to invest \$500 million in Alberta technology companies.
Challenges	<ul style="list-style-type: none"> Innovate lacks connections with the financial sector CEDs financial sector strengths don't lie in the areas of technology and innovation Funding to Emergex was put on hold by the last provincial government Venture Capital metrics don't exist
Supplementary Indicator Data	In 2016 Innovate Calgary will introduce a set of common indicators to be measured across the organization.

I1.3: Attract foreign direct investment and trade opportunities for the technology sector	
Lead: Calgary Economic Development	
Activities & Opportunities	<ul style="list-style-type: none"> Continue to build relationships with Innovate to include clients on missions <p>Innovate identified 2 businesses considering moving to Calgary. CED coordinating with Innovate to facilitate the investment – still ongoing</p>
Challenges	Many inbound missions hosted by CED have not been closely aligned with Innovate Calgary's clients – CED and Innovate will continue to explore opportunities in this area
Supplementary Indicator Data	In 2016 Innovate Calgary will introduce a set of common indicators to be measured across the organization

I2.1: Establish new and support existing hubs of innovation, providing virtual and physical spaces where communities of interest can exchange ideas	
Lead: Innovate Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> Innovate Calgary and CED partnered with other stakeholders to launch AlbertaIN, an online directory assisting innovators and entrepreneurs connect with the most suitable service provider to meet their needs. The process of



	<p>creating AlbertaIN brought together over 75 service providers from across southern Alberta. There are plans to extend the portal to northern Alberta in 2016.</p> <ul style="list-style-type: none"> • Several Calgary groups continue to explore and support social enterprise including post-secondary institutes and a working group sponsored by Vibrant Communities Calgary <p>New provincial government may extend support to develop social enterprise in Calgary.</p>
Challenges	With respect to social enterprise the support agencies are disparate with no clear unified goal and support from the Government of Alberta has been unclear.
Supplementary Indicator Data	A group organized by Vibrant Communities Calgary is currently quantifying the social enterprise sector in Calgary as part of the implementation of the Calgary Poverty Reduction Initiative.

I2.2: Enhance guidance, mentoring and coaching available to technology and innovation entrepreneurs	
Lead: Innovate Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> • The launch of AlbertaIN assisted in identifying and addressing gaps in the innovation ecosystem. • Innovate Calgary initiated Alberta Venture Mentoring Service that has matched 12 startup companies with mentoring companies. • There are 9 tech related meetups in Calgary – Innovate’s meetup has over 1800 members while Startup Calgary’s meetup has over 1000 members
Challenges	Connecting the various meet up and mentoring programs in Calgary to ensure startups are matched to the most appropriate program.
Supplementary Indicator Data	In 2016 Innovate Calgary will introduce a set of common indicators to be measured across the organization. AlbertaIN will be helpful in gathering aggregate data for the sector.

I2.3: Integrate technology entrepreneurship and intrapreneurship content in post-secondary education programs to meet the future labour force needs of the technology sector	
Lead: Post-secondary Institutes	
Activities & Opportunities	<ul style="list-style-type: none"> • Over 1000 students are participating in entrepreneurial programming at the the University of Calgary’s Hunter Centre. • Innovate and their clients mentor engineering students in the capstone course.
Challenges	It is still not completely understand how to identify a potential entrepreneur to offer support as early in the entrepreneur lifecycle as possible.
Supplementary Indicator Data	In 2016 Innovate Calgary will introduce a set of common indicators to be measured across the organization.



I2.4: Celebrate and promote innovation	
Lead: Innovate Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> There are over 30 events across Alberta celebrating achievements in the technology and innovation space Innovate, TEC Edmonton and ASTech are considering consolidating their awards activities – there is opportunity for further collaboration to reach a larger audience.
Challenges	While collaboration is increasing, innovation continues to be a fractured space. AlbertaIN will likely enhance collaboration including in the area of celebrating innovation.
Supplementary Indicator Data	<ul style="list-style-type: none"> 9 tech related meetups in Calgary – Innovate’s meetup has over 1800 members while Startup Calgary’s has over 1000 members.

People Energy

Goal: Calgary embraces social inclusion and shared prosperity.

P1.1: Maximize the potential of all Calgarians to meet the region’s labour needs	
Lead: Calgary Economic Development	
Activities & Opportunities	<ul style="list-style-type: none"> Extensive outreach conducted with Calgary’s post-secondary institutions, industry associations, private sector and government departments to support, enhance and launch programs, projects and workshops to assist employers and employees create and find meaningful work. With renewed focus on innovation and diversification, the provincial and federal governments are providing additional supports to job creation, flexible work and training programs to prepare the labour force for the 21st century economy.
Challenges	The downturn in the economy has raised the profile of the need to retain and create jobs and to train and place people into meaningful work placements.
Supplementary Indicator Data	<p>High School completion 2012/13 Calgary School District 19 - 74.0%</p> <p>High School completion 2012/13 Calgary Roman Catholic – 81.0%</p> <p>Youth unemployment (20 – 24 years) Nov 2014 – 5.9% Oct 2015 – 9.7%</p> <p>Persons with disabilities (15 years and over) – 64% in labour force, 59% employed, unemployment 7% (2012)</p> <p>Aboriginal People (15 years and over) – 75% in labour force, 67% employed, unemployment 11% (2011)</p>

P1.2: Support the implementation of ‘Enough for All’ (the Calgary Poverty Reduction Initiative) in generating economic activity that provides strong social benefits	
Lead: Vibrant Communities Calgary	
Activities & Opportunities	Implementation continues



Challenges	<ul style="list-style-type: none"> Economic downturn, while raising awareness for poverty, has challenged organizations abilities to coalesce and coordinate activities. Groups coming together to address poverty are disparate and have different levels of capacity It is not easy to steward the number of agencies that are involved in addressing poverty.
Supplementary Indicator Data	2011 11% of Calgarians were Low Income Measure After Tax (LIM-AT) Vibrant Communities Calgary is developing performance metrics for the implementation of the Calgary Poverty Reduction Initiative.

P1.3: Collectively map, develop and implement a welcoming program for newcomers to Calgary	
Lead: Calgary Economic Development	
Activities & Opportunities	Enhanced collaboration with respect to hiring practices and work placement for new Canadians might improve outcomes.
Challenges	<ul style="list-style-type: none"> Efforts are ongoing but the Economic Strategy has not been successful in enhancing collaboration and outcomes in this area. Programs and projects to assist newcomers are often restricted by the funds received – without increased funding it is difficult to enhance services.
Supplementary Indicator Data	Median income recent immigrants 2011 - \$24,995 Average income recent immigrants 2011 - \$35,793 Recent immigrant population (15 years and over) – 83% in labour force, 77% employed, unemployment rate 7% (2011)

Community Energy

Goal: Calgary is a vibrant, urban and prosperous community that offers people-friendly neighbourhoods, diverse housing and inspirational spaces.

C1.1: Build a range of housing options for all ages, income groups and family types to meet the needs of residents today and tomorrow	
Lead: The City of Calgary and Calgary Economic Development	
Activities & Opportunities	Availability of construction and traders workers and declining costs of construction may encourage additional affordable housing construction projects.
Challenges	Economic downturn has caused attention to shift from affordable housing to employment.
Supplementary Indicator Data	25.3% of Calgarians spent more than 30% of household income on shelter in 2011. Comparable to the Canadian average

C1.2: Direct future growth in a way that fosters more compact and efficient use of land, creates complete communities, allows for greater mobility choices and enhances vitality and character in local neighbourhoods.	
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Lead: The City of Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> The City initiated the Mainstreets Strategy in 2015. The City continues to work closely with developers to focus on transit oriented development, creating complete communities, increasing the percentage of development in existing neighbourhoods and increasing the percentage of the population living within walking distance of services. The City is launching a new planning system that will include an 'explore phase' where those applying for a development permit meet with City staff to flush out issues before applying for the permit.
Challenges	None identified
Supplementary Indicator Data	<ul style="list-style-type: none"> Land use diversity index increased to 0.54 from 0.53 (out of one 2014) Residential diversity index increased to 0.23 from 0.11 (out of one 2014)

C2.1: Develop an integrated, multi-modal transportation system that supports a prosperous and competitive economy	
Lead: The City of Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> The City completed the Calgary Pedestrian Strategy in 2015 The City may undertake 3 large transportation infrastructure projects in the next few years: Southwest Transitway, Greenline LRT, Southwest Ring Road
Challenges	While City Charter negotiations are underway with the Province, alternative revenue generation for The City has not yet been broached.
Supplementary Indicator Data	<p>Annual transit ridership increased from 111.5 million trips in 2014 to an estimated 113.2 million trips in 2015</p> <p>Alberta household spending on transportation \$15,360 compared to Canadian average \$12,041 (2013) – available at provincial level only</p>

C2.2: Address greater connectivity between Calgary's primary cultural, recreation and commercial districts in the Centre City (Stampede Park to Calgary Zoo and Inglewood to Downtown West Village).	
Lead: The City of Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> CalgaryNEXT has opened the conversation to a number of potential project including Stampede development, East Village developments south of CP rail, revitalized convention facilities and remediation and redevelopment of the West Village – all with significant implications for the Centre City. The City of Calgary has commenced work on the 1st St SW, 4th St SW and 8th St SW underpasses in 2015 The City of Calgary implemented the cycle track pilot project in 2015
Challenges	Economic downturn will stall the ability to attract additional hotel space to the Centre City area.
Supplementary	



Indicator Data	
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C2.3: Establish Calgary as an artistically vibrant city and cultural destination in Canada	
Lead: Calgary Arts Development	
Activities & Opportunities	<ul style="list-style-type: none"> • CADA will launch SpaceFinder in 2016 – an online tool allowing artists and community groups to find and book art space. • CADA has launched an Artists in Residence Program with the Calgary Chamber – bringing a different perspective into the corporate boardroom. • CADA has secured 105 signatories to Living a Creative Life and works with hundreds more in implementing the strategy. • 3 significant facility additions to the arts scene in 2016 – National Music Centre, Decidedly Jazz Danceworks and the King Edward Arts Incubator.
Challenges	None identified
Supplementary Indicator Data	<ul style="list-style-type: none"> • 10,289 activities by organizations supported through CADA in 2014. • 87% of Calgarians engaged with the arts in some way in 2014.

C2.4: Build a city where all Calgarians can participate in sport and recreation to the extent they choose	
Lead: The City of Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> • Recreation collaborating with Parks to develop a Playfield Strategy that incorporates policy, cost structure and field allocations. • Recreation monitoring the use of Fair Calgary initiatives and continues to refine processes to reduce/ eliminate barriers in accessing recreation opportunities for low income Calgarians. • Recreation collaborating with Corporate Properties to maximize the use of other facilities such as Community Association buildings and lands. • The City is moving forward with ground breaking on 3 City funded skateparks in the summer of 2015 as part of the Skateboarding Amenities Strategy. <p>Funding provided to Calgary Winter Lacrosse Association to assist in developing their Multi sport facility.</p>
Challenges	None identified
Supplementary Indicator Data	<ul style="list-style-type: none"> • 4,447,356 participant visits to City of Calgary recreation programs, services and facilities (2014) • 52,831 program visits in after school programs (2014) • 63% of Calgarians are physically active enough to experience health benefits (2014) • 27,137 Calgarians accessed the Fee Assistance Program (2014)



Collaborative Energy

Goal: Calgary is the best place to live in Canada, with strong collaboration between public, private and nonprofit sector partners in building a great city.

B1.1: Position Calgary as the location of choice to live, visit, meet, start a business and invest	
Lead: Calgary Economic Development and Tourism Calgary (co-lead)	
Activities & Opportunities	
Challenges	Declining revenue will restrict marketing budgets in 2015
Supplementary Indicator Data	<ul style="list-style-type: none"> Tourism Calgary's marketing budget is 40% regional, 35% national, 25% international CED's marketing campaigns generated 42 million impressions and 45 national and regional media stories in 2014

B1.2: Showcase Calgary's urban assets to the world and increase citizen participation in events and festivals	
Lead: Tourism Calgary	
Activities & Opportunities	<ul style="list-style-type: none"> The City of Calgary launched a Cultural Strategic Planning process in 2015. 2016 being marketed as the Year of Music
Challenges	None identified
Supplementary Indicator Data	59 culture and sports bids won in 2014

B2.1: Implement the Economic Strategy for Calgary	
Lead: Economic Strategy for Calgary	
Activities summarized in Implementation Plan Update	

