

WINDOW ON THE

WEST

WESTERN CANADIAN POLICY MATTERS

END OF AN ERA

Roger Gibbins retires after
14 years at the helm of the
Canada West Foundation

- Unlocking Manitoba's Transportation Gateway
- Reflections on a Dynamic and Prosperous West
- Natural Gas as a Transportation Fuel

MAY 2012 | www.cwf.ca

Canada West
FOUNDATION



A Strong West in a Strong Canada

The Canada West Foundation is the only think tank dedicated to being the objective voice for public policy issues of vital concern to western Canadians. Sometimes these issues are unique to the West, but more often they resonate right across Canada.

We are resolutely nonpartisan. We let the research do the talking rather than rely on predetermined positions.

Our goals are straightforward: better government policy; a prosperous West in a prosperous Canada; fair treatment of all regions in the federation; and a strong democracy based on open debate and meaningful citizen engagement.

Over the past 40 years, our research and recommendations have advanced all four of these goals. We are a source of ideas and information. We are a facilitator of discussion and civic participation.

We give the people of British Columbia, Alberta, Saskatchewan and Manitoba a voice. A voice for their aspirations, interests and concerns. As westerners, we understand the people and the places of the West. We know our history and how it influences our future. Whether it is the economy, energy, environment, education, healthcare, taxes, social services, urban issues, intergovernmental relations or any other policy area of importance to the West, we have researched it, commented on it, stimulated debate about it and recommended practical options for improving the policy response—all from a uniquely western point of view.

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A leading source of strategic insight, conducting and communicating nonpartisan economic and public policy research of importance to the four western provinces and all Canadians.

The Canada West Foundation explores public policy issues of particular interest to western Canadians, national policies against regional aspirations and ensures an effective regional voice in national policy discussions and the national political process.

WINDOW ON THE WEST

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Questions and comments can be sent to:
Robert Roach
Vice President, Research
and Editor of *Window on the West*
roach@cwf.ca
403.538.7354

Advertising inquiries can be sent to:
Grace Kucey
Vice President, Operations
kucey@cwf.ca
403.538.7348

Canada West Foundation Members and Subscribers receive a complimentary hard copy of *Window on the West*. To find out how to become a Member or Subscriber, please contact:

Kevin Reeves
Director of Fund Development
reeves@cwf.ca
403.538.7356

Canada West Foundation
900, 105-12 Avenue SE
Calgary, Alberta, Canada
T2G 1A1
403.264.9535
cwf@cwf.ca | www.cwf.ca

Putting the Think in Think Tank

Looking back at the 14 years over which I have had the pleasure of working with Roger Gibbins at the Canada West Foundation, two things stand out. First is Roger's unassuming and wonderfully dry sense of humour. When you are knee-deep in untangling the arguments for and against market-based instruments for advancing land stewardship or trapped in a room discussing best practices in bi-cameral legislative design, the importance of being able to see the lighter side of public policy cannot be overstressed.

Second is Roger's ability to offer fresh and objective insight on any given policy issue. This is a particularly valuable trait given that the world of public policy is often overrun by ideological perspectives that stifle creativity and cloud clear thinking. Sometimes think tanks forget the thinking part and jump to a set of prefab conclusions. Roger's approach is very different; he has never been afraid to see an issue from all sides and let objective analysis carry the day—even when his audience would prefer something else.

Roger will be sorely missed at the Canada West Foundation, but his thoughtful and honest approach to the critical public policy issues of the day will remain the model we follow.

On behalf of past and current Canada West Foundation staff, thanks for the mentorship, the laughs and for doing such a great job of putting the think into this particular think tank.

I hope that you enjoy this special abridged edition of *Window on the West*. We will be back with a full edition this fall.



Robert Roach
EDITOR



Western Canada's Gateway Yesterday & Tomorrow

Manitoba is often referred to as the “gateway to the West.” The phrase is used to highlight its role as a transportation hub. Located at the centre of not only Canada but North America, Manitoba has a natural advantage in this area. The challenge Manitoba faces is to find new ways to capitalize on its location and expand its transportation sector in the face of favourable and unfavourable global trends and fierce competition.

This was the theme of an evening dinner program hosted by the Canada West Foundation in Winnipeg on November 24, 2011. Sponsored by Canadian Western Bank, the evening featured a keynote speech by Premier Greg Selinger as well as presentations by Diane Gray, President & CEO of CentrePort Canada Inc., Dr. Art Mauro, Chancellor of Lakehead University and Jean-Marc Ruest, Vice President of Richardson International Limited.

Premier Selinger began the evening by harkening back to Manitoba's role as a gateway during the fur trade and Winnipeg's emergence as a major railway hub in the late 19th and early 20th century. The city was dubbed the Chicago of the North and the Canadian Pacific Railway yards were among the largest marshalling yards in North America.

The Premier stressed that, while location was key, it was the long-term thinking and proactive efforts of Manitobans to create a gateway community that brought success to the province.

The edge was taken off this early success by the opening of the Panama Canal in 1914. The canal offered ships a faster route to the west coast than sailing all the way around South America. As a result, less trade flowed through Manitoba.

Today, Manitoba has the potential to become the hub of not only east-west traffic but for the entire North American continent. This will involve Manitoba's current and planned transportation assets and complementary initiatives such as a foreign trade zone and rapid US border crossing procedures. A key part of this transportation vision is a 20,000-acre inland port known as CentrePort Canada that links together Manitoba's rail, trucking and air capacity. Another key piece of the puzzle going forward is the Port of Churchill—Canada's only Arctic seaport.

Building the Hub

To achieve this vision, Diane Gray of CentrePort argued that three things are particularly important. First, Canada must continue to improve its attractiveness as a place to do business. By keeping corporate tax rates low, eliminating tariffs on manufacturing inputs and investing heavily in infrastructure, Canada will attract more shipments of goods into and out of the country and can become a competitive alternative to access points into the North American market via the US and Mexico.

Second, we must be cognizant of the growing importance of non-US markets. Exports into Asia Pacific markets will be critical, so our transportation links to this part of the world matter and they will matter even more in the future. Canada's North also possesses huge growth potential and Manitoba is well-situated to provide transportation services to this region.

Third, Winnipeg, Manitoba and Canada must all do better at standing out from the global pack. Despite *Forbes* magazine recently calling Canada the best place in the world to do business, Canada is still relatively unknown. Canadians need to be far more aggressive in promoting what they have to offer and this holds true for Manitoba as well.

“A starting point for understanding Manitoba as a gateway is understanding that it is a trading province.”

— DIANE GRAY

Looking North

Art Mauro added to this by noting that geography alone is not enough to make Manitoba and Winnipeg into transportation gateways. Manitoba's role as gateway resulted from visionary public policy and entrepreneurship and its future as a gateway requires the same partnership.

The recent development of CentrePort as a major inland port has highlighted Winnipeg's role as a gateway for domestic and international trade, but of equal importance is the role that the Port of Churchill can play in serving international markets.

Churchill should be recognized as a major port facility in the centre of the continent. It should also be seen as having a critical role to play in northern development. These two opportunities, however, require massive investments in the capacity of the port.



“Canada is only half built. There are huge opportunities in the North.”

— ART MAURO

Grain Transportation

Jean-Marc Ruest turned to a discussion of the future of Winnipeg and Manitoba as grain transportation hubs. In the past, grain flowed east through Winnipeg for domestic consumption in eastern Canada and export to Europe. But two fundamental changes have occurred affecting the future movement of grain through Manitoba.

First, the growth of eastern European grain producers who can supply the European market, increasing demand from Asia, and Europe’s refusal to accept genetically modified crops now mean that the majority of grain is shipped to the west coast. Instead of being in the middle of the flow of the grain, Manitoba is on the outer edge.

Second, the western Canadian grain handling network has been rebuilt. Thousands of small wooden grain elevators have been replaced by a small number of high throughput facilities. This means that full trains can be loaded right at the elevator and go straight to their destination without the need for handling or decoupling in Winnipeg.

These changes explain why Manitoba’s prominence in grain transportation has faded. It is important to stress that this loss of prominence is the result of global market forces rather than something that Manitoba failed to do.

Manitoba is, however, on the cusp of another wave of change that will follow the transformation of the Canadian Wheat Board into a voluntary marketing agency effective August 1, 2012. This change will allow Manitoba companies to buy and sell wheat and barely in much the same way as they currently buy and sell canola, oats, peas, flax and other crops.

Given the changes to the flow of grain through Manitoba and the forthcoming changes to the Wheat Board, how can Manitoba adapt and position itself in the best way possible? Jean-Marc Ruest argued that placing a primary focus on infrastructure to become a major hub of transportation for grain runs counter to the realities he described. This is not to say that there are no opportunities with respect to the transportation of agricultural products.

Winnipeg is one of the only major Canadian cities with access to three class 1 railways, all of which provide rail access to the US. This is important in light of the impending changes to the Wheat Board for two reasons. First, it is not unreasonable to assume that the flow of grain into the US will significantly increase. With three competing rail carriers going into the US, Manitoba will have an advantage over other jurisdictions.

Second, we may see an increase in value-added processing of wheat and barely in western Canada. Companies that are considering building processing plants will look favourably at locations that have access to competing railways and the ability to ship product to the US. Ruest stressed that it is important for Manitoba to ensure that this advantage is maintained and increased. He argued that the development of greater US routing capacity and an increase in the number of railway interconnections to allow shippers to have a competitive option rather than be captive to any single railway should be encouraged.

The challenge is to recognize that the grain industry has changed and will change even more. Manitobans must move quickly to adapt to the new reality. This will allow Manitoba to be the beneficiary of the change rather than its victim.

“Manitoba cannot afford to be as good as its competitors; it needs to be better.”

— JEAN-MARC RUEST

Unlocking the Gate

All four presenters at the dinner highlighted the advantages Manitoba and Winnipeg have with regard to enhancing their roles as North American transportation hubs. However, they also stressed that these advantages will come to naught unless proactive steps are taken to maximize them in the face of a range of competitors and inexorable global forces. To paraphrase Art Mauro, geography alone makes Manitoba a corridor but not a gateway. Whether it is the ongoing development of the inland port, upgrading the Port of Churchill or adapting to the new realities of the grain industry, it will be the ingenuity and hard work of Manitobans that will make the province a true gateway.

Reflections on a Dynamic

When Dr. Gibbins announced his retirement from the Canada West Foundation, he was asked to reflect on how the West has changed and on how he sees its future unfolding. The following selection of his observations suggests that the region has changed dramatically and that more change is on the way.

If we look back over the past decade and a half, we see that western Canada has moved from a political culture of grievance to one of national leadership. Nowhere is this change more evident than in the shift from grieving over the National Energy Program to leading the charge for a Canadian energy strategy. We have moved from a preoccupation with the West's place in Canada to a renewed focus on the West's place in the global economy. We still want in, but into what has changed quite dramatically as our focus has moved from eastern Canada to the Asian west.

In a sense we have come full circle, back to the agrarian pioneers in the West whose prosperity was inextricably linked to global markets. We are pioneers once again.

The history of western Canada has been all about connecting with the world, all about bringing people in and shipping stuff out. It has been about the CPR and CN, about the Crow Rate and Wheat Board, about the Ports of Churchill, Prince Rupert and Vancouver.

Our history has been about immigration, about railroads and pipelines, about trains, planes and automobiles, about moving wheat and lumber, and now oil and gas, uranium, potash and expertise to an expanded global market.

Although western Canadians have always been traders, the global opportunities today are greater than they have ever been. Canada is tipping west, but so too is the world. The West's position as Canada's gateway to Asia is a huge strategic advantage as we move forward.

Think for a moment about the Chinese labourers who, more than anyone else, built the railroads linking the rest of Canada to the west coast, and the west coast to the rest of Canada. Today, their ancestors are the market that we are trying to reach, and the market upon which so much of our future prosperity will rest.

This focus on the global economy does *not* mean that we have turned our back on Canada; far from it. Here my thinking has been shaped by the argument that Peter Lougheed made back in the days when he was under attack for being an Albertan first, and not a "true" Canadian. Premier Lougheed argued that by being a strong Albertan he was being a strong Canadian, just as we all might argue today that being a strong western Canadian is being a strong Canadian.

Regional and national identities can be, should be, complementary, not competitive.

The old tension between regional and national identities seems so "yesterday." We are now playing on a larger stage where regional and national identities are both challenged by global realities and aspirations. If we take the world's population of 7 billion, then only 1 person in 700 lives in western Canada. Finding our niche in this crowded world will not be easy.

These changes and challenges in western Canada should be of more than idle curiosity for Canadians living elsewhere in the country. I believe that the story about the evolution of western Canada is, at its very core, the story about the evolution of Canada. What might appear at first blush to be a regional story is, in fact, a national story, maybe the national story of our times.

The "new West" is really the new Canada, ours to fashion if we are prepared to take up the challenge. Now of course our predecessors had this chance before, in the early decades of the 20th century, when wave after wave of immigrants were quite literally building the new Canada. But then that opportunity was blown away by the Great Depression, and the West was left as a declining region in Canada. The new post-war Canada was being built on the shores of Lake Ontario.

Today, we have a second chance and whether Canada will prosper in the years ahead depends very much on what happens here.

However, if today's opportunities are great, so too are the challenges. We will not simply fall into success, or inherit success. If we cash in the chips of our resource wealth like a wealthy dowager clipping coupons from a family inheritance, we will surely earn the lasting antipathy of generations to come.

& Prosperous West

We are so fortunate to have settled here, in this very special corner of Canada, and of the world. However, the risk of good fortune is complacency. We must be stewards of our good fortune, and stewardship can never mean sitting back and taking it easy.

Too often we assert that because we have what the world needs—the energy, food, natural resources and expertise—the world will beat a path to our door. However, if anyone has to do the beating, it is us.

Our basic challenge is both simple and incredibly complex:

How do we build a sustainable resource-based economy that will succeed in a 21st century global economy that values knowledge, creativity and innovation above all else? How can we use today's natural bounty to build something new and sustainable for tomorrow? How can we be modern hewers of wood and drawers of water while at the same ensuring that our children and grandchildren will have access to the best and most exciting jobs in the future economy?

How do we attract and retain increasingly scarce human capital? How do we ensure that potential immigrants, when faced with the choice of Barcelona in the spring or Saskatoon in January, choose Saskatoon? (I said the challenge was incredibly complex!)

How, moreover, do we preserve our natural environment. Here I often think of the motto the “Alberta Advantage,” and my frustration that it was too often defined as simply a low tax environment. When I get up in the morning, I can look out and see the Rocky Mountains and feel inspired. Rarely do I wake up and say, “thank God that Alberta does not have a provincial sales tax!” More generally, it is the miles and miles of the prairie landscape, the huge clouds pushing across the fields, the lakes and vineyards of BC, the seawall around Stanley Park—all of this is my West.

So where does all of this leave an organization like the Canada West Foundation? We are not wealth creators in the traditional sense, but we can help western Canadians see the world in new ways. We have the capacity, and the responsibility, to bring people together to help design their future rather than fall into it. To steal a phrase from Premier Redford's recent election campaign, we want a future by design. We don't want to stumble forward to an uncertain destination; we want to run with a clear destination in mind.

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FILL 'ER UP?

Natural Gas in the Transportation Sector



Transportation is an essential activity. People and goods need to move from point A to point B. Doing so requires energy. Given our reliance on transportation and its energy-intensive nature, it should come as no surprise that transportation accounts for approximately a quarter of the energy end-use in the United States and Canada (according to the Energy Information Administration and the National Energy Board).

Most major contemporary means of transportation use crude oil-based fuels because they offer high energy density. High energy density is ideal for transportation because it means smaller fuel tanks are required than would be the case for lower energy density fuels.

However, the dominance of crude oil in transportation is being challenged for both environmental and economic reasons. Crude-based fuels produce a lot of carbon dioxide, enough to account for more than 40% of energy-related carbon dioxide emissions in the US. Natural gas, on the other hand, emits less carbon dioxide when burned and also has lower particulate, nitrogen and sulfur oxide emissions than crude-based fuels. In an increasingly environmentally conscious world, natural gas may be a feasible option for reducing our emissions footprint.

Moreover, crude oil prices appear stuck at around \$100 a barrel, suggesting high pump prices are here to stay for the foreseeable future. At the same time, increased supply is driving natural gas prices down. The wellhead price of natural gas in December 2011 in the United States was \$3.14/mcf (thousand cubic feet, according to the Energy Information Administration) and futures recently dipped below \$2.00/mcf.

A glut of shale natural gas has drastically increased supply. Technological innovation has unlocked natural gas once trapped in impermeable and inaccessible shale rocks. The Energy Information Administration recently estimated technically recoverable Canadian and American shale gas resources at well over one trillion cubic feet (and there's even more expected to exist in Mexico). As a result, production of natural gas has risen recently and the price of natural gas has fallen.

These twin imperatives present us with an opportunity to reconsider oil's central role in transportation. Consumers are looking into alternatives, including hybrids, fully electric vehicles and biofuels. Natural gas is another potential replacement that should get more

attention, especially given the potential benefits to America's north and to western and northern Canada. As of 2009, Alaska is estimated to have about 290 trillion cubic feet (TCF) of technically recoverable shale gas. Similarly, Canada is estimated to have more than 740 TCF, mostly in western Canada. Exploration is ongoing in Canada's north, particularly in the shale formations of the Mackenzie Valley.

However, there are two major obstacles facing natural gas's adoption as a transportation fuel. First, the incremental costs of a natural gas-powered vehicle are significant. While the investment will more than pay for itself over time, the steep initial extra cost of going with natural gas is a deterrent for some. Moreover, the business case is best for a limited subsection of the transportation industry (namely, medium and heavy duty "return to base" and regional corridor fleets). Second, there is inadequate refueling infrastructure, which is primarily a chicken-and-egg problem: there is inadequate infrastructure because too few natural gas vehicles are operated; too few natural gas vehicles are operated because there is inadequate infrastructure.

One option to mitigate the incremental cost is for government to provide an incentive. It is a reasonable suggestion, but only if the environmental credentials of natural gas are well-established. That is, government should only be involved if there are demonstrable environmental benefits that are not being captured in the market price.

Unfortunately, the environmental credentials are not as well-established as they could be. While we know that at end use (i.e., combustion) natural gas releases fewer greenhouse gas emissions than coal or oil, there are questions about its environmental impact at other stages of the lifecycle. A recent study measured the natural gas released during hydraulic fracturing, a key process needed to access shale gas. It found that enough methane—a potent greenhouse gas—is released during hydraulic fracturing to eradicate the greenhouse gas savings at combustion.

If this finding can be substantiated, and if there is little that can be done to mitigate the release of methane at this stage, then the environmental benefits of the switch to natural gas are much reduced. Without the greenhouse gas benefits, it is reasonable for governments to take a hands off approach to the use of natural gas as a transportation fuel.

Order now

Catching a Rising Tide



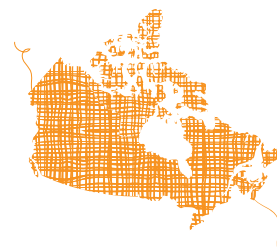
The Canada West Foundation published an inspirational new publication about Canada's energy future on October 12, 2011.

Catching a Rising Tide: A Western Energy Vision for Canada is a unique book by Sheila O'Brien and Shawna Ritchie.

Drawn from one-on-one conversations with 50 leading western Canadian experts in energy and the environment who shared their vision for energy, this book illustrates Canada's current energy reality and highlights the opportunities for a bright energy future.

Catching a Rising Tide: A Western Energy Vision for Canada is available for purchase at www.cwf.ca

ECONOMIC WATCH



The Warp & Woof of Canadian Federalism

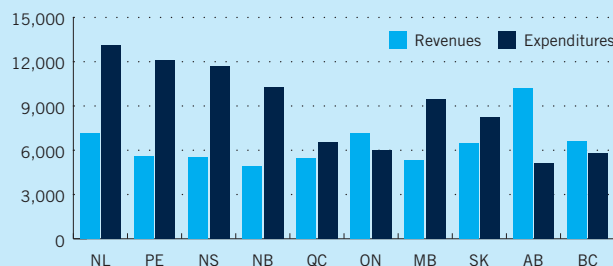
In recent years, Alberta has been far and away the largest net contributor to the country. Over the 2005 to 2009 period, total federal revenues collected in the province exceeded total expenditures by a sum total of \$88.5 billion. Only two other provinces were net contributors over those years – Ontario and BC. Ontario residents paid about \$75.6 billion more in taxes than they received in federal spending from 2005 to 2009, while those in BC made a net contribution of \$17.6 billion. All other provinces were net beneficiaries of federal wealth redistribution, led by Quebec at \$42.6 billion over that five-year period.

Taking into account differences in population, Alberta's net contribution becomes even larger. From 2005 to 2009, taxes paid by each Albertan exceeded per capita federal spending by an average of \$5,043 each year – more than four times as much as Ontarians (\$1,190 per person). For their part, British Columbians' average per capita contribution was \$819 annually in those years. Atlantic Canadians are the largest beneficiaries on a per capita basis, led by PEI, where the net inflow of federal funds averaged \$6,504 per year over that period.

While Alberta and BC residents were net contributors to the federation in recent years, Saskatchewan and Manitoba have been net beneficiaries. In Manitoba, the total net inflow of federal money from 2005 to 2009 was \$24.9 billion, equivalent to an average of about \$4,154 per capita each year. In Saskatchewan, the total net inflow was smaller, at \$8.6 billion (\$1,746 per person). However, the two provinces are moving in opposite directions. Saskatchewan's net balance has shrunk considerably in recent years, while Manitoba's has been growing.

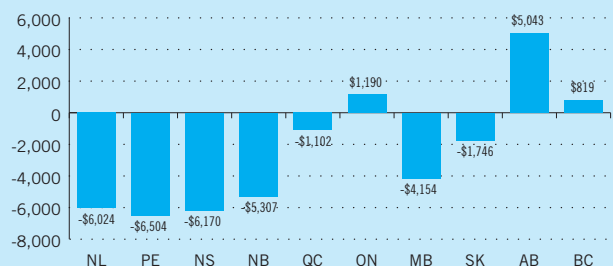
The fact that, over a five-year period, Albertans paid \$88.5 billion more in federal taxes than they received in federal spending sounds like a tremendous sum of money. Indeed, there should be no doubt that this represents a significant contribution to Canada. However, issues of interprovincial equity and fairness are more complicated than they appear at first blush and bottom line numbers can sometimes obscure the bigger picture or lead to misleading conclusions about the impact of such transfers. These are issues that the Canada West Foundation will be examining in more detail in the coming months.

Average Federal Revenues and Expenditures, 2005-2009
(\$ per capita)



Source: Statistics Canada Provincial Economic Accounts, Canada West Foundation.

Net Federal Fiscal Transfers by Province, 2005-2009
\$ per capita (annual average)



Source: Statistics Canada Provincial Economic Accounts, Canada West Foundation.

ROGER GIBBINS

Policy Innovation Fund



As President & CEO of the Canada West Foundation from 1998 to 2012, Dr. Roger Gibbins inspired people across the West and Canada to think differently about policy issues. Under his direction, the Canada West Foundation has been a leading voice on the key policy issues facing western Canadians.

As a testament to his legacy and ongoing relationship with the Foundation, the Policy Innovation Fund was created to allow us to initiate innovative and informed debate in his honour. Focusing on emerging challenges facing western Canada and the region's natural resource economy, the Fund will support cutting edge policy research and a citizen engagement program designed to bring contemporary policy challenges to the attention of the next wave of leaders and engaged citizens.

PLEASE SUPPORT THE LEGACY OF ROGER GIBBINS

To find out more about this unique opportunity & how you can support the Policy Innovation Fund, please contact:
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Our sincerest thanks are also extended to our Founding Members;

G. Maxwell Bell, Arthur J.E. Child, Frederick C. Mannix and the Honourable James A. Richardson.

CANADA WEST FOUNDATION
900-105 12th Avenue SE
Calgary AB T2G 1A1
p: 403.264.9535
e: cwf@cwf.ca

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