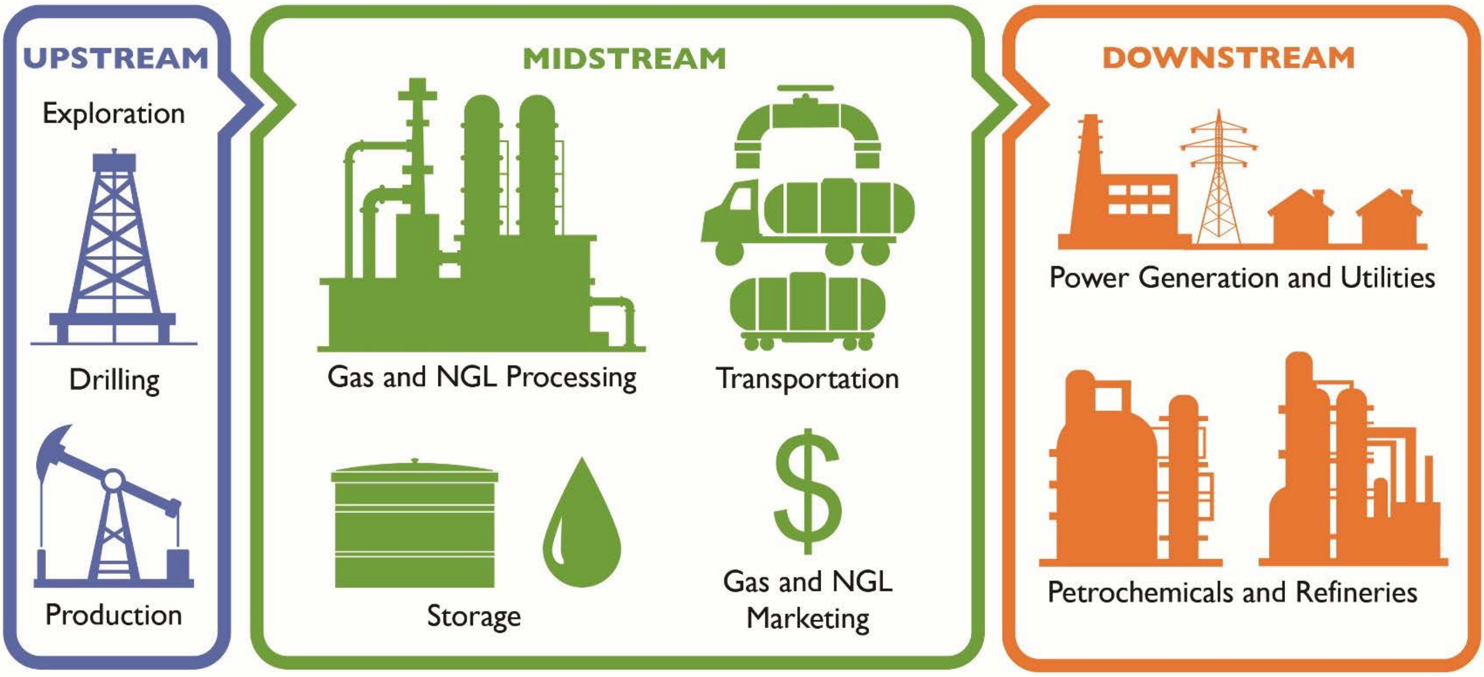
2020

Current Capacity and Potential for Indigenous Involvement in Midstream and Downstream Energy Sector Supply Chains



InnoTech ALBERTA
A SUBSIDIARY OF ALBERTA INNOVATES

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Executive Summary

With increased attention and investment in midstream and downstream oil and gas projects in Alberta, the potential exists for Indigenous companies and communities to become business and equity partners, building on the trend of participation set mostly in the upstream oil and gas industry over the past two decades.

Part I of this report describes the business case for Indigenous involvement in midstream and downstream oil and gas. The United Nations Declaration on the Rights of Indigenous People (UNDRIP) and the Truth and Reconciliation Commission of Canada (TRC) recommendations have changed the competitive requirements of firms in Alberta, and in Canada as a whole. As a result, the energy industry should aim to have 5% Indigenous procurement to maintain a competitive edge in the marketplace, at all points along the value chain - upstream, midstream and downstream. Five percent Indigenous procurement is a recommendation by the Canadian Council for Aboriginal Business and is meant to reflect the percentage of the Canadian population that identifies as Indigenous.

Indigenous business procurement and equity investment play a pivotal role in narrowing the income gap and alleviating poverty amongst Indigenous populations. Current Indigenous participation in procurement and equity investment in midstream and downstream oil and gas sectors varies by Indigenous group in Alberta. Historically, Indigenous groups have partnered with industry proponents for modest royalties and jobs. There is, however, heightened interest in acquiring ownership stakes in developments that can create revenue streams in communities. On the basis of the needs and policy recommendations related to Indigenous communities, in 2019 the Government of Alberta introduced the Alberta Indigenous Opportunities Corporation (AIOC; Bill 145). The intent of the AIOC is to reduce the cost of capital for Indigenous groups, to support their ability to raise capital for resource projects and boost Indigenous community ownership of projects and equity investment. The AIOC is managing a $1 billion fund that provides loans, loan guarantees, equity purchase, joint ventures or partnerships for Indigenous groups to be partners in natural resource development projects and associated infrastructure.

Part II of this report describes three Business Development Training & Engagement sessions that InnoTech Alberta developed for Indigenous companies with a focus on midstream and downstream oil and gas projects. Sessions were held at the Grey Eagle Resort in Calgary on September 23-24, 2019, at the River Cree Resort in Edmonton on November 12-13, 2019, and at the Pomeroy Hotel in Grande Prairie on February 11, 2020. Representatives from 71 Indigenous-owned companies, First Nation and Métis Settlement Economic Development Corporations attended. Fifteen major

purchasers, including owner/operators, engineering, procurement, and construction firms (EPCs) were recruited to train and engage with Indigenous companies. This format opened a direct line of communication between Indigenous suppliers and industry buyers.

We conducted a survey of Indigenous companies and industry buyers who participated in our events. Overall, we received positive feedback on the event size, business to business interaction, 1:1 meetings, the panel of Indigenous companies, and the openness of buyers.

All respondents representing Indigenous companies reported that attending the event resulted in new business contacts. Almost all respondents (97%) reported that the event increased their company's awareness of business opportunities within the midstream and downstream oil and gas sector. Most respondents left the event with a new business lead (86%). The event resulted in most respondents getting on a new pre-qualification list (67%). Attending the event resulted in a follow-up business meeting for most respondents (67%). Most respondents will also make changes to a business process as a result of attending the event (61%).

Our survey revealed that most Indigenous companies reported capabilities in project management, reclamation/remediation, environmental services and engineering services. Future growth areas for companies included safety services, road work, hauling (delivery and pickup) and tree fallers. When asked about barriers to business development, most respondents cited limited access to capital, shortage of skilled labour and marketing and business development opportunities.

We also surveyed representatives from midstream and downstream buyer companies/presenters that participated in the Business Development and Training Sessions. All respondents reported that attending the event helped their company identify new potential Indigenous suppliers. Almost all (88%) respondents reported that the event increased their awareness of Indigenous businesses. Almost all (86%) respondents reported that participating in the event resulted in a follow-up meeting with a potential Indigenous supplier company.

We summarized the presentations made by the 15 midstream and downstream buyer companies noting the most frequently mentioned perspectives and expectations. The most common requirement that buyers/presenters spoke about was having a documented safety program and good track record of safety performance. The second most common issue mentioned was the expectation of fair and transparent pricing. Other top issues were sustainability principles, Certificate of Recognition (COR) and Small Employer Certificate of Recognition (SECOR) requirements, and registration with ISNetworld.

Using the learnings from this project, we recommend consideration of the following: (1) creating a Northeastern Alberta Aboriginal Business Association (NAABA) or Resource One Aboriginal Business Association (ROABA) equivalent in Grande Prairie to support Indigenous participation in natural gas and other midstream and downstream projects, (2) establishing an office in Calgary for those Indigenous companies that have remote operations, (3) enhancing Indigenous involvement in asset retirement, remediation and reclamation, (4) further training for companies in providing estimates, proposal writing and registration with ISNetworld and ComplyWorks (5) Indigenous ownership of facilities such as gas plants or refineries and (6) mentoring 'Indigenous sister' companies.

Part I – Business Case

Chapter 1. The Business Case for Indigenous Engagement in the Midstream and Downstream Energy Sector

Oil and gas development is already (and has been for years), the largest contributor to Alberta's gross domestic product (GDP), capital investment and exports[1]. The downturn in oil and gas prices since 2015 has prompted the province to embark on initiatives to support the oil and gas industry, monetize the natural gas value chain, diversify markets and develop midstream and downstream projects. For example, forty-two new major (≥$5 million/project) midstream and downstream projects valued at $63.5 billion are either proposed or were under construction in Alberta in the 4th quarter of 2019[2] (Appendix 1). This is in addition to existing facilities' maintenance, repair and operations budgets, which are substantial given that Alberta has the most pipelines and petrochemical plants in Canada[3].

Historically, Indigenous communities have commonly been excluded from economic development opportunities afforded to non-Indigenous peoples. Canada has a dark history of colonialism. The rights of Indigenous peoples were limited by the *Indian Act*, which for example, prohibited business ownership. Intergenerational trauma still persists today from the legacy of the residential schooling system[4].

In 2015, the Truth and Reconciliation Commission of Canada (TRC) issued 94 Calls to Action that are intended to support a future of reconciliation with Canada's Indigenous peoples. Call to Action 92 is specifically geared towards Business and Reconciliation.

After oil and natural gas are produced in the ***upstream*** subsector, it is processed, stored, transported and marketed in the ***midstream*** subsector. The third subsector is ***downstream***, where oil and natural gas products are refined, marketed and distributed.

Truth and Reconciliation Commission of Canada Call to Action for Business and Reconciliation[23]:

92. We call upon the corporate sector in Canada to adopt the *United Nations Declaration on the Rights of Indigenous Peoples* (UNDRIP) as a reconciliation framework and to apply its principles, norms, and standards to corporate policy and core operational activities involving Indigenous peoples and their lands and resources. This would include, but not be limited to, the following:

i. Commit to meaningful consultation, building respectful relationships, and obtaining the free, prior, and informed consent of Indigenous peoples before proceeding with economic development projects.

ii. Ensure that Aboriginal peoples have equitable access to jobs, training, and education opportunities in the corporate sector, and that Aboriginal communities gain long-term sustainable benefits from economic development projects.

iii. Provide education for management and staff on the history of Aboriginal peoples, including the history and legacy of residential schools, the United Nations Declaration on the Rights of Indigenous Peoples, Treaties and Aboriginal rights, Indigenous law, and Aboriginal–Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights, and anti-racism.

In 2016, the Minister of Indigenous and Northern Affairs announced that Canada fully supports (without qualification) the *United Nations Declaration on the Rights of Indigenous Peoples* (UNDRIP). Earlier in 2010, Canada had issued a Statement of Support endorsing UNDRIP. A United Nations declaration is an expression of political commitment on matters of global significance.

Following this series of events, national initiatives have been launched to engage Indigenous businesses in supply chains that span various industries[5]. In Alberta, Bill 14: the *Alberta Indigenous Opportunities Corporation Act*, was introduced in 2019 to provide new income streams for Indigenous people, specifically by increasing access to capital and technical support to invest in natural resource projects and infrastructure[6].

In the recent past, the upstream oil and gas sector has provided jobs and royalties to Indigenous communities and has been one of the main economic engines in many communities. There are currently hundreds of Indigenous-owned companies involved in upstream oil and gas supply chains[7]. Canada's Oil and Natural Gas Producers

(CAPP) estimates that $55 million in payments went to Indigenous governments between June 1 to December 31, 2017, $48.6 million was invested in Indigenous communities, and 11.9 thousand jobs in the oil and gas sector were held by Indigenous people in 2016[8].

With increased attention and investment in midstream and downstream energy projects in Alberta, the potential exists for Indigenous peoples to become business and equity partners, building on the trend of participation set in the upstream oil and gas industry. The following sections outline additional elements that support Indigenous involvement in the midstream and downstream energy sector.

Leveraging Indigenous Demographics in Alberta

There are approximately 258,640 Indigenous people in Alberta (6.5 % of Alberta's population[9]). There are 48 First Nations in Alberta and 8 Métis settlements, though more Indigenous people live off reserve than on reserve (Figure 1). The Indigenous population in Alberta resides primarily in rural and large population centres[9]. Edmonton has the second largest population of Indigenous people in an urban setting in Canada (Edmonton is second to Winnipeg).

In Alberta, the Indigenous population (mean age = 29.8 years) is younger than the non-Indigenous population (mean age is 37.8 years)[9]. In Canada, the Indigenous population is growing at a rapid pace, and increased by 19.5 %, compared to an increase of 4.2 % in the non-Indigenous population between 2011 and 2016[10].

The younger, faster growing Indigenous population will be an important offset to Canada's ageing population in the future. By 2030, approximately one in four Canadians will be seniors [11].

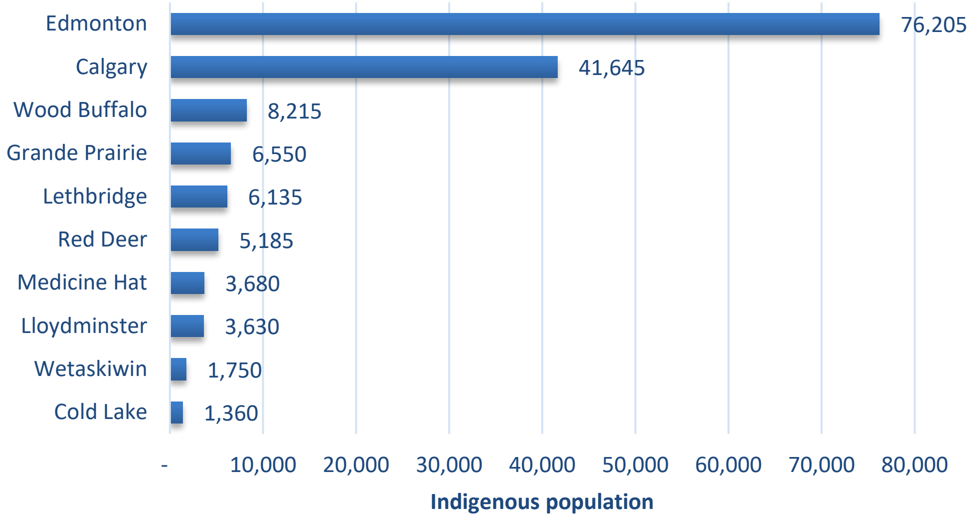

Figure 1. Indigenous population size in Alberta by location[9]

In 2019, Indigenous people in Alberta had a lower employment rate than non-Indigenous people (Figure 2). Indigenous women had the lowest employment rate (69.3 %) compared with Indigenous men (79.3 %) and non-Indigenous people (83.6 %)[12]. Indigenous population growth rates suggest that there is an increasing supply of workers, and greater potential demand for employment, amongst this demographic[12].

Skills training was the most frequently cited factor reported by First Nations in Canada that would better equip them to find a job, while women also reported that childcare and work experience would be useful assistance for them to obtain employment.[12]

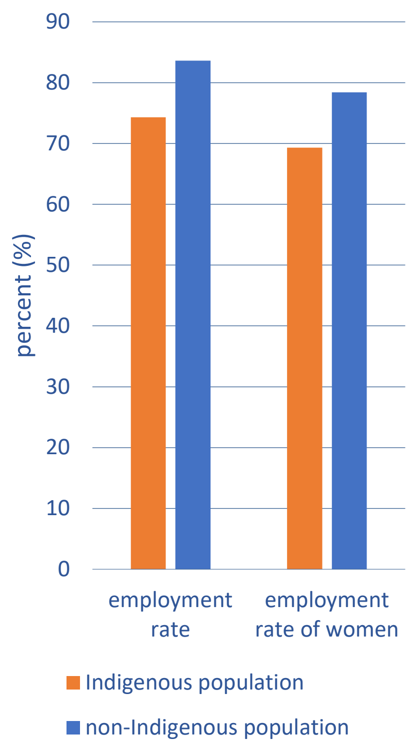

Figure 2. Employment statistics in Alberta in 2019[12].

Indigenous Majority-owned Businesses

Indigenous businesses play a pivotal role in narrowing the income gap and alleviating poverty amongst Indigenous populations[13]. Business capacity varies among communities from large, active firms to a few start-ups[4].

An Indigenous business may be defined as one that consists of at least 51% Aboriginal ownership and control, and with at least one third of the company's employees being Aboriginal[14] (provided the company has six or more full time employees).

If a firm is starting a joint venture or consortium, it must have at least 51% of the joint venture or consortium controlled and owned by an Aboriginal business[14].

Many Indigenous communities across Canada have created Economic Development Corporations which are owned by the community and create and manage businesses on the community's behalf[13]. In a national survey of Economic Development Corporations conducted by the Canadian Council for Aboriginal Business, most were found to be incorporated (84%), owned by a single community (76%) and profitable, with 79% posting a net profit in the previous fiscal year. Approximately half of the Economic Development Corporations surveyed operate 1-5 businesses. They employed on average, 278 staff[13].

Economic Development Corporations also frequently established partnerships (70% have 1-5 corporate partnerships) with non-Indigenous corporations to obtain large projects, build capacity and profit and support employment within the community[13]. Another study reports that, between 2015-2017, 17.6% of majority Indigenous-owned small and medium-sized enterprises (SMEs; 1-499 employees) had introduced at least one organizational innovation[15]. This was greater than any other ownership type. An organizational innovation is a new organizational method in business practice, workplace organization or external relations[15].

The Canadian Council for Aboriginal Business recommends a target of 5% of a company's procurement spend to be supplied by Indigenous businesses[4]. This is based on Indigenous people comprising 5% of the Canadian population (6.5 % in Alberta).

Engaging Indigenous businesses provides opportunities for new partnerships and investments[4]. Failing to engage can result in reputational damage, regulatory intervention, litigation, project delays and financial loss[4].

Business Capacity in the Off-reserve Indigenous Population

About 11% of employed First Nations people living off-reserve were self-employed in Alberta in 2017[16]. In Alberta, approximately 53% of self-employed First Nations people owned an incorporated business. This is higher than any other Canadian province or territory. In Canada, more First Nations men than women who were self-employed had an incorporated business (45% vs 24%), and more men than women had employees (36% vs 21%). Freedom or independence was the main reason cited for choosing to be self-employed (31%). Most (88%) of self-employed First Nations people received no external assistance for their business; examples of external assistance include financial assistance, procurement programs, and information on business opportunities, help in establishing business contracts, and training/development programs from a Government, organization, or financial institution[16].

Alberta Indigenous Opportunities Corporation

The capacity to invest in large natural resource projects varies across Indigenous communities. One of the major hurdles faced by Indigenous firms is the high degree of difficulty associated with attaining adequate security on loans for financial lenders. Section 89(1) of the *Indian Act* protects property on-reserve by prohibiting its use as collateral. This combined with other issues such as limited access to angel investment or venture capital often prevents Indigenous participation in major deals and equity investment.

In 2019, the Government of Alberta introduced the Alberta Indigenous Opportunities Corporation (AIOC; Bill 145). The intent of the fund is to reduce the cost of capital for Indigenous groups, to support their ability to raise capital for resource projects and boost Indigenous community ownership of projects and equity investment. The AIOC is a $1 billion fund which provides loans, loan guarantees, equity purchase, joint ventures or partnerships for Indigenous groups to be partners in natural resource development projects and associated infrastructure. The fund also provides access to legal and technical advisors for resource development projects.

Indigenous groups eligible to access the AIOC are:

- Indigenous groups as defined by the *Indian Act*,
- Métis Settlements identified in the *Métis Settlements Act*,
- Métis groups as defined by regulation,
- entities fully owned by the aforementioned groups, and
- other entities approved by the Minister of Indigenous Relations that fall within the AIOC mandate.

The AIOC will also support partnerships with Indigenous communities from other provinces (provided there is a minimum of 25% Alberta community involvement). The AIOC will focus on investments that are in the later stages, rather than early stage investments.

The AIOC will be governed by a Board of Directors of up to 9 members that will manage the AIOC's business and ensure the AIOC meets its mandate to facilitate investment by Indigenous groups. The Government of Alberta will appoint a deputy minister as a non-voting member to the Board and allow the Minister of Indigenous Relations to issue directives. Alberta Indigenous Relations is the responsible government ministry for the AIOC.

It is hoped that the AIOC will be used to garner greater participation in equity investment and natural resource projects from Indigenous groups. This will lead to re-investment of financial returns into further projects, job creation and economic growth in Indigenous communities.

Eligible natural resource projects that may access the AIOC include oil and natural gas, forestry and renewables. In Northwestern Alberta for example, there are several First Nations that are situated on the Montney Natural Gas Formation (Figure 3). The AIOC represents a potential opportunity for these communities to participate in natural gas projects in the region.

> *The time has come to move beyond symbolic gestures to real, practical measures for Indigenous people to benefit from the resources that lie beneath the lands that they first inhabited.*
>
> Premier of Alberta - Jason Kenny

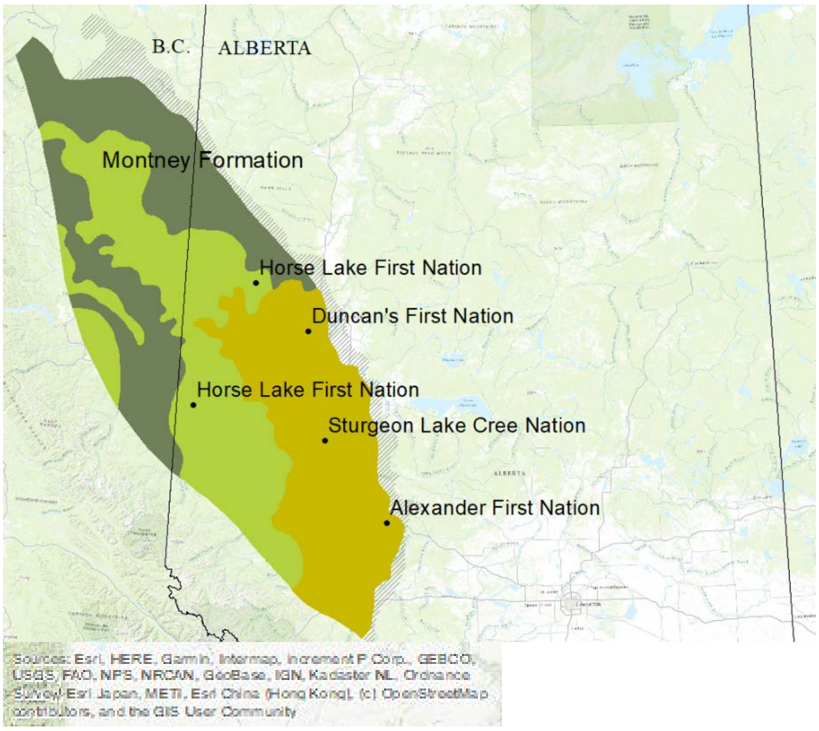

Figure 3. The Montney Natural Gas Formation beneath First Nations lands in Alberta

Supplier Diversity

Supplier diversity is a strategic business practice that aims to provide an equal opportunity for under-represented companies to become suppliers to major corporations[17]. In Canada, a diverse supplier is usually one that is majority owned by a woman, Indigenous person, veteran or LGBTQ. The benefits of diversifying a supplier base include:

- Demonstrating inclusivity in supply chain practices
- Local community benefits such as engagement, economic growth and job creation
- Better reflection of the customer base
- Enhanced corporate image
- Meeting corporate social responsibility objectives

Engagement of suppliers in a supplier diversity program does not however guarantee that under-represented companies will obtain business from corporations. Supplier diversity also does not entail compromises on the quality or cost of the product or services being offered[17].

Supplier development

Without a competent supplier network, a buyer's ability to compete effectively in the market can be significantly affected[18]. Supplier development is 'a long term co-operative effort between the buying firm and its suppliers to upgrade the suppliers' technical, quality, delivery and cost capabilities and to foster ongoing improvements'[19]. Supplier development strategies and potential benefits to buyers include[20]:

1. *Competitive pressure*: This is where a buyer uses market forces to generate competition among the supplier community. By using multiple suppliers to provide a service or product, the buyer can reward a higher volume of business to the best performing supplier. This motivates the other suppliers to improve their offering, and also incentivises the best supplier to maintain high standards to keep market share. A supplier who demonstrates improved performance may be rewarded with increased market share over time.

2. *Evaluation and certification*: Routine supplier evaluation and feedback ensures that suppliers are aware of their performance and the buyers' standards and expectations. These processes can also serve to motivate suppliers to improve their performance over time.

3. *Incentives*: To motivate suppliers, a buyer may offer incentives such as sharing of cost savings, considering increased volumes and future business and recognising suppliers through awards.

4. *Direct involvement*: Buyers can become directly involved in suppliers' operations through making capital and equipment investments, taking an equity position in a supplier company, or investing human resources to develop suppliers.

To help meet the TRC Calls to Action, to support UNDRIP, enhance supplier diversity and supplier development in the midstream and downstream oil and gas sector, InnoTech Alberta with the support of Alberta Economic Development Trade and Tourism, developed three Business Development Training and Engagement sessions for Indigenous companies. Representatives from 71 Indigenous-owned companies, First Nation and Métis Settlement Economic Development Corporations attended. Fifteen major purchasers, including owner/operators, engineering, procurement, and construction firms (EPCs) were recruited to train and engage with Indigenous companies. This format opened a direct line of communication between Indigenous suppliers and industry buyers. Part II of this report describes these sessions and their outcomes in detail.

Part II – Report on Midstream and Downstream Oil & Gas Indigenous Training & Engagement Sessions, including supplier and buyer firm surveys

Chapter 2. Report on Business Development Training & Engagement Sessions for Indigenous Companies

We developed and delivered three Business Development Training & Engagement sessions for Indigenous companies in midstream and downstream oil and gas. Sessions were held in Calgary on September 23-24, 2019 at the Grey Eagle Resort, Edmonton on November 12-13, 2019 at the River Cree Resort, and Grande Prairie on February 11, 2020. Representatives from 71 Indigenous-owned companies, First Nation and Métis Settlement Economic Development Corporations attended.

Fifteen major purchasers, including owner/operators, engineering, procurement, and construction firms (EPCs) were recruited to train and engage with Indigenous companies. This format opened a direct line of communication between Indigenous suppliers and industry buyers (Figure 4).

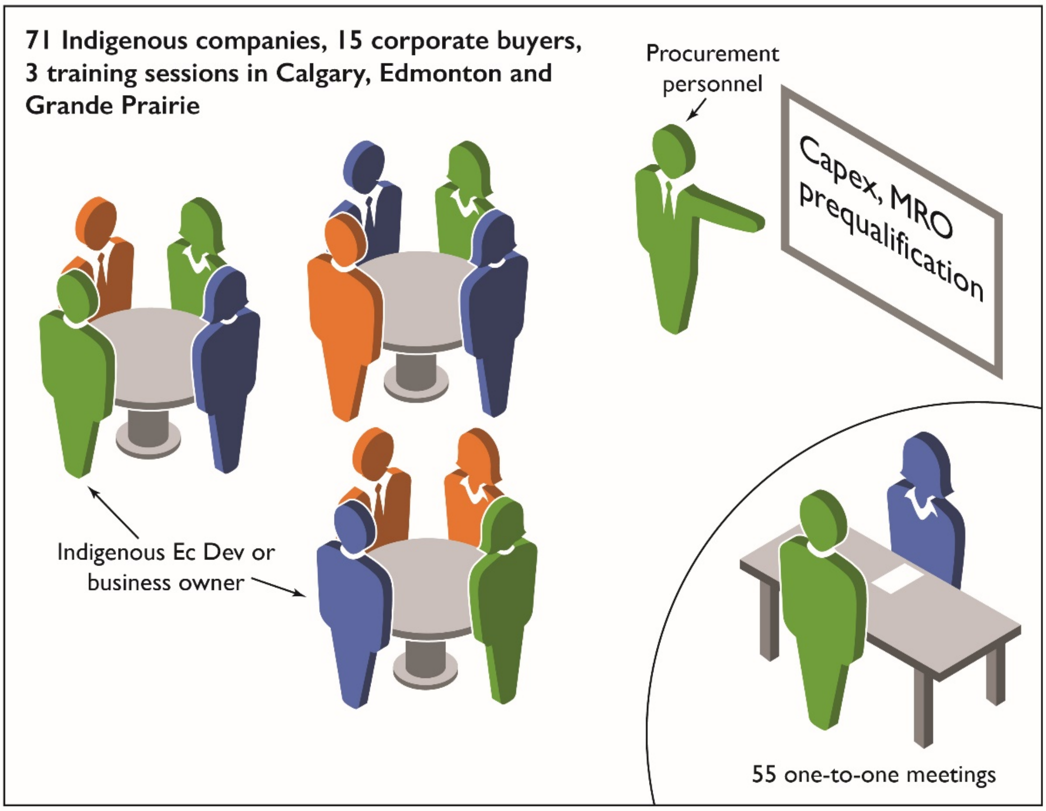

Figure 4. Business Development Training & Engagement Sessions for Indigenous Companies

Presenters and Presentation topics

Procurement representatives from 15 midstream and downstream companies gave presentations (Table 1). Representatives from the Canadian Council for Aboriginal Business (CCAB), Alberta Indigenous Opportunities Corporation (AIOC) and the Canadian Energy Research Institute (CERI) also delivered presentations on becoming a certified Aboriginal business, the AIOC and Canadian natural gas opportunities, respectively. Peace Hills Trust (Canada's largest and oldest First Nations owned federally regulated financial institution) also presented on financing options for Indigenous companies.

Table 1. Midstream and downstream (buyer) companies that participated in training and engagement sessions

Company
A & B Pipeliners
ATCO
CN Rail
Dow
Keyera
LCOS
Nauticol
NTL
PCL
Pembina
Peridae Energy
Plains Midstream Canada
Stantec
Steel River
TC Energy

Presentation topics and content included:

- Major capital expenditure plans - proposed projects, approved projects
- Maintenance, repair and operations activities
- Procurement process and procedures (e.g. how to respond to bids/RFPs)
- Safety and prequalification requirements
- Pitfalls in getting business
- What types of opportunities are available for local small/medium sized Indigenous businesses?
- Where do I register my interest in providing goods, services and supplies?

- The long game in developing your business (advice to companies)

We also arranged 55 private, one-to-one meetings between industry procurement representatives and the Indigenous companies in attendance. Anecdotally, we learned that deals were signed at some of these meetings.

We advertised the Business Development Training sessions by sending an invitation to register to all First Nations, Métis settlements, relevant Indigenous organisations and Indigenous oil and gas companies. We followed-up with phone calls and in-person meetings. We also advertised the sessions on social media. Representatives from 71 Indigenous-owned companies, First Nations and Métis Settlement Economic Development Corporations attended (Table 2; Figure 5).

Table 2. Indigenous companies, First Nations and Settlements that participated in the Business Development and Training Sessions. (These companies self-identified as majority Indigenous-owned; we did not verify ownership.)

1	Acden (Athabasca Chipewyan First Nation)	39	Normatec Workforce Solutions
2	All Peace Protection	40	Northern Pike Energy Services
3	Aniwye Environmental	41	Nosim's Construction
4	Apeiron Resources Ltd	42	Ogakie Industries Ltd
5	Aseniwuche Development Corporation (Aseniwuche Winewak Nation)	43	On Target Oilfield
6	Aseniwuche Winewak Nation	44	Onion Lake Energy (Onion Lake Cree Nation)
7	Atikameg Construction & Oilfield Maintenance Corp (Whitefish Lake First Nation)	45	Papachase First Nation
8	Ava Energy	46	Peerless Trout Enterprise Inc (Peerless Trout First Nation)
9	Bigston Cree Nation	47	Phoenix Energy Services
10	Buffalo Lake Development Corp	48	Pimee Well Servicing (Beaver Lake First Nation, Frog Lake First Nation, Heart Lake First Nation, Kehewin Cree Nation, Saddle Lake First Nation and Whitefish (Goodfish) Lake Band #128)
11	Buffalo Lake Métis Settlement (Buffalo Lake Métis Settlement)		
12	Carvel Electric	49	Pinnacle Consulting
13	Cascade projects	50	Precision Gradall
14	Chiniki Nation	51	Primco Dene Group of Companies (Cold Lake First Nation)
15	Country boyz Oilfield Services Ltd	52	Pro Paint
16	CP Services	53	Royal Signet Alberta Contracting Limited
17	Dukes Building Supplies	54	Schroder Oilfield Services
18	Duncan's First Nation	55	Scout Engineering
19	Ermineskin Resources Development Ltd (Ermineskin Cree Nation)	56	Spirit Land and Resources
20	Fast Labour Solutions Ltd	57	Steel River Group
21	Fort McKay First Nation	58	Stoney Nation
22	Goodfish Lake Business Corporation (Goodfish Lake First Nation)	59	Sturgeon Lake Resources Ltd (Sturgeon Lake Cree Nation)
23	Heart Lake First Nation	60	Subterra Engineering
24	Horse Lake First Nation	61	Sucker Creek First Nation Services LP (Sucker Creek First Nation)
25	Horse Lake First Nations Oilfield Construction Corporation (Horse Lake First Nation)	62	Thomas Kanata Inc.

26	Horse Lake Industry Relations Corporation (Horse Lake First Nation)	63	Total Trenchless Ltd
27	HSB Pipelines and Safety	64	True North Modifications Inc.
28	Impact Safety Solutions	65	TruShot NDT
29	Indigenous Consulting and Environmental	66	Tsuutina Contracting General Partners Inc. (Tsuut'ina Nation)
30	Indigenous Innovative Solutions Inc	67	Value Compressor Parts
31	Jewel Contracting	68	Virtus Services Ltd
32	Lauren Services	69	West Environmental Ltd
33	Larr Management Corporation	70	West Industrial Ltd
34	Little Red River Group of Companies (Little Red River Cree Nation)	71	West Geomatics Ltd
35	Louis Bull Tribe		
36	Lubicon Lake Band Ventures (Lubicon Lake Band)		
37	Maskwacis Cree Tribal Council		
38	Montana First Nation		

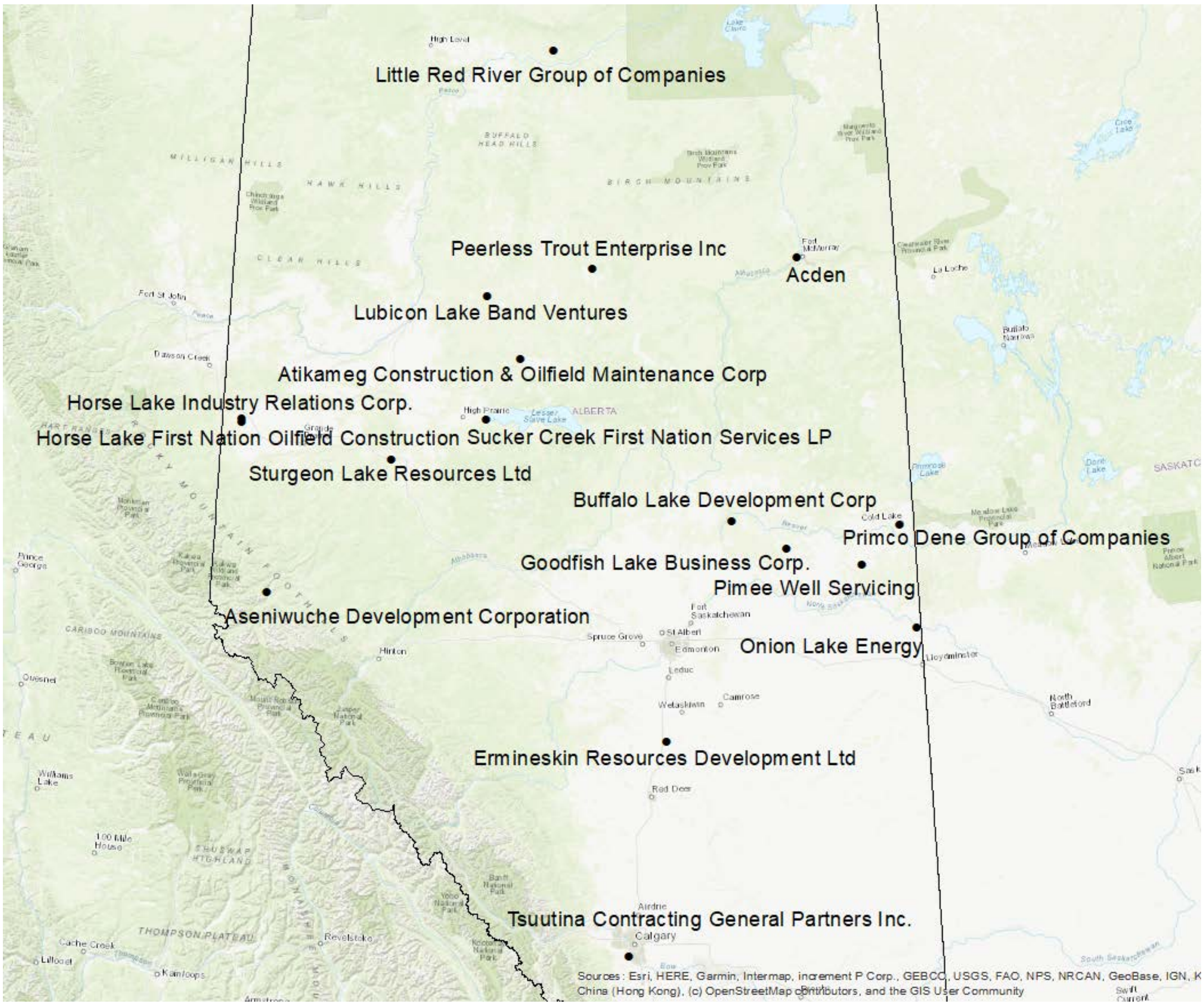

Figure 5. Location of Indigenous companies (with community ownership) that participated in the Business Development and Training Sessions.

Training session outcomes and evaluation

We conducted an online survey of Indigenous supplier companies and industry buyers who participated in each of our events, one-week post-event. Overall, we received positive feedback on the event size, business to business interaction, private 1:1 meetings, panel of Indigenous companies, and openness of buyers.

Indigenous company reaction and learning

Thirty-six representatives from Indigenous-owned companies/First Nations/Settlements that participated in the Business Development and Training Sessions responded to the online post-event survey (response rate = 50%). All respondents reported that attending the event resulted in new business contacts (Figure 6). Almost all respondents (97%) reported that the event increased their company's awareness of business opportunities within the midstream and downstream oil and gas sector. Most respondents left the event with a new business lead (86%). The event resulted in most respondents getting on a new pre-qualification list (67%). Attending the event resulted in a follow-up business meeting for most respondents (67%). Most respondents will also make changes to a business process as a result of attending the event (61%).

A list of comments received from Indigenous companies is provided (Appendix 2).

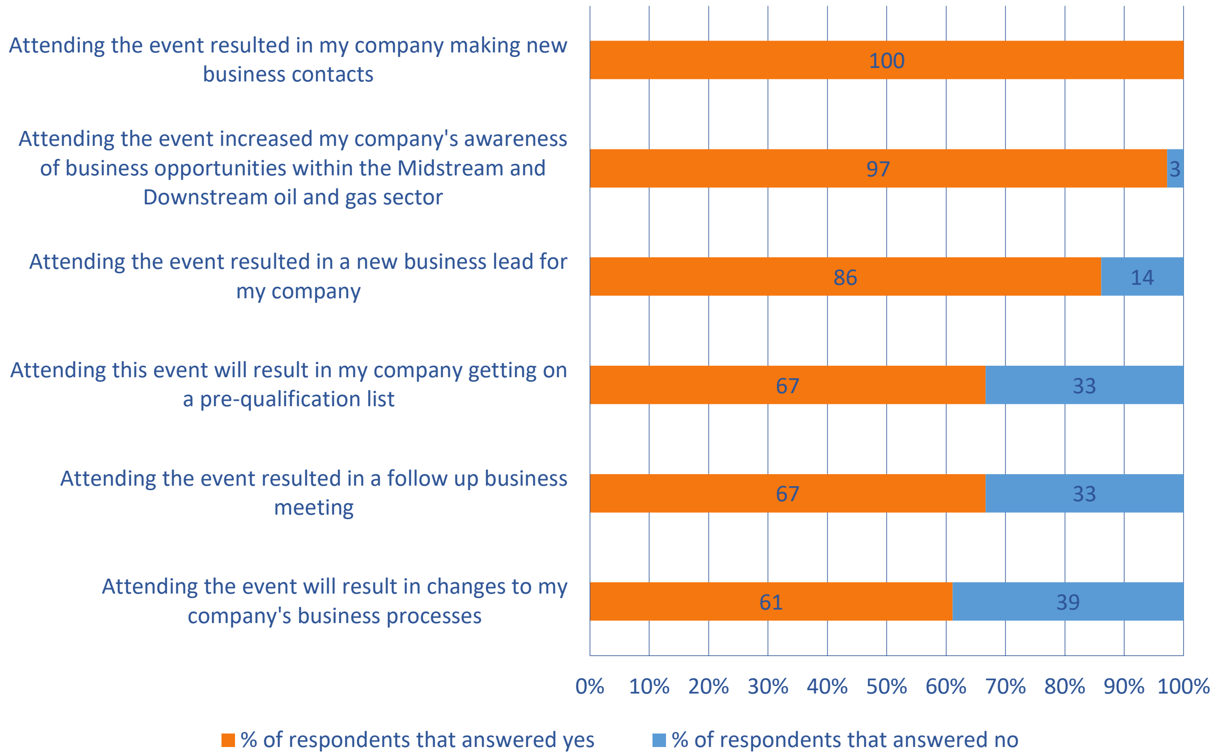

Figure 6. Indigenous company response to online survey about the training & engagement sessions (n=36)

Industry representative reaction and learning

Eight representatives from midstream and downstream buyer companies/presenters that participated in the Business Development and Training Sessions responded to the online post-event survey (response rate = 53%). All respondents reported that attending the event helped their company identify new potential Indigenous suppliers (Figure 7). Almost all (88%) respondents reported that the event increased their awareness of Indigenous businesses. Almost all (86%) respondents reported that participating in the event resulted in a follow-up meeting with a potential Indigenous supplier company.

A list of comments received from midstream and downstream buyer companies/presenters is provided (Appendix 3).

Figure 7. Midstream and downstream buyer companies/presenters response to online survey about the training & engagement sessions (n=8)

Buyer expectation and perspectives in procurement

We summarized the presentations made by the 15 midstream and downstream buyer companies noting the most frequently mentioned perspectives and expectations (Figure 8). The most common requirement that buyers/presenters spoke about was that of suppliers having a documented safety program and good track record of safety performance. The second most common issue mentioned was the expectation of fair and transparent pricing. Other top issues were sustainability principles, COR and SECOR requirements, and registration with ISNetworld.

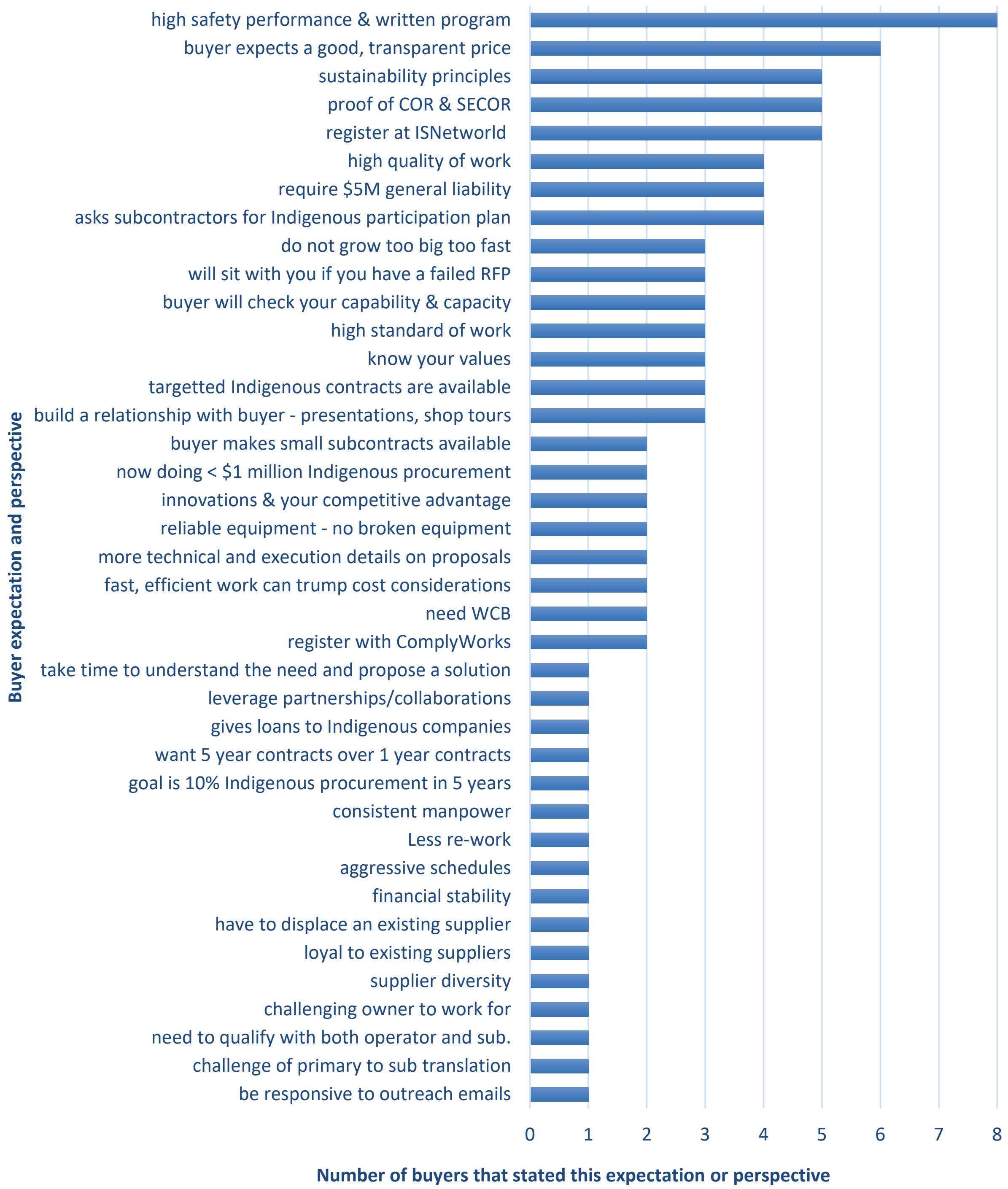

Figure 8. Expectations and perspectives of midstream and downstream buyer companies in relation to procurement of supplies and services

Indigenous company perspectives on procurement

Two panels representing six Indigenous companies at the Calgary and Edmonton events were asked for their feedback on procurement policies, and on their perspectives on Indigenous procurement. The following are key points that arose from the panel discussions:

1. Indigenous companies hire a high percentage of Indigenous employees (e.g. Pimee Well Servicing has 97% Indigenous employees). Supporting Indigenous companies thus supports Indigenous peoples. Providing one job to an individual often supports entire families including children and grandparents.

2. Indigenous companies are there for the long-term. For example, after the Fort McMurray fires, Indigenous procurement increased, as other companies left the area.

3. Obtaining capital is difficult. Business loan guarantees are high for First Nations.

4. Economic Development Corporations that have an independent Board of Directors are able to separate politics from business and are good for business.

5. Levels of Indigenous engagement can differ between an owner/operator or prime and its various subcontractors. Sometimes sufficient Indigenous engagement and procurement does not occur at the subcontractor level, despite the intentions of the owner/operator.

6. Indigenous companies would like to offer more technical services that extend beyond the construction phase of a project. Involvement in maintenance, repair and operations, can provide more long-term contracts and jobs.

7. The investment environment is changing; millennial shareholders, investors and consumers want to see women, Indigenous people and diversity in boardrooms.

8. Some Indigenous companies who primarily serve upstream would like to diversify their customer base to include midstream and downstream services.

Chapter 3. Current Capacity in Indigenous Companies

Current Indigenous participation in procurement and equity investment in midstream and downstream oil and gas varies by Indigenous group in Alberta. Historically, Indigenous groups have partnered with industry proponents for modest royalties and jobs[21]. There is however heightened interest in acquiring ownership stakes in developments that can create revenue streams in communities. Perhaps the most well-known example in the midstream/downstream sector is the Suncor East Tank Farm deal, where Fort McKay First Nation and Mikisew Cree First Nation put up 49% of equity, amounting to $503 million.

New, proposed equity investments in midstream and downstream energy have also been conceived over the past few years in an effort to get Alberta's oil to market and make use of abundant feedstock for oil and natural gas products. These include the Eagle Spirit Pipeline, TransMountain pipeline, and the Nauticol methanol plant.

In the downstream sector of the oil and gas value chain, Indigenous companies own approximately 75 fuel stations across Alberta[22], demonstrating capacity as distributors, as well as demand for fuel (Appendix 4). Fuel stations are one of the commonest businesses on reservations across Alberta and can offer a sense of pride and self-sufficiency.

In the Enbridge Line 3 replacement project from Hardisty, Alberta to Gretna, Manitoba, Indigenous workers comprised 20% of the pipeline workforce[24]

Indigenous company capacity survey

To create a profile of Indigenous companies with capacity to work in the midstream and downstream oil and gas sector, we surveyed 40 Indigenous companies (35 companies, 4 First Nations and 1 Métis Settlement) with capacity to supply into midstream and downstream oil and gas projects (paper survey). Survey participants were attendees at our business development training events.

Most Indigenous companies reported employing between 1-10 core employees (median number of employees = 11; Figure 9). Most companies have been in operation for 0-3 years, or >10 years (Figure 10). Most of the companies in our survey are owned by an individual, rather than a community (Figure 11). Most companies reported earning less than $1 million in gross sales revenue 2018 (Figure 12). Most respondents worked across upstream, midstream and other categories (Figure 13). Most respondents work in Western Canada (Figure 14). When asked about barriers to business development, most respondents cited limited access to capital, shortage of skilled labour and marketing and business development opportunities (Figure 15).

When asked about current technical capacity and service offerings, most Indigenous companies reported capabilities in project management, reclamation/remediation, environmental services and engineering services. Future growth areas for companies included safety services, road work, hauling (delivery and pickup) and tree fallers (Figure 16).

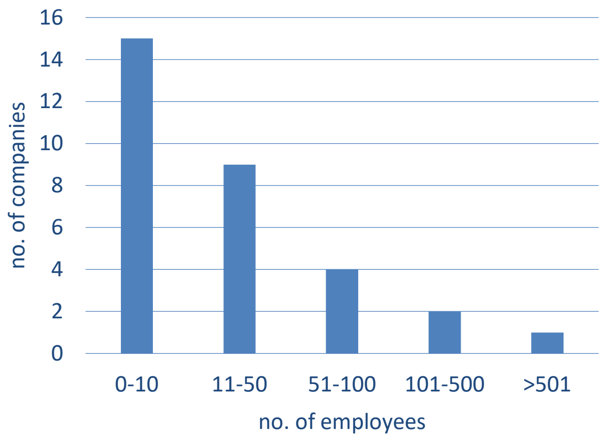

Figure 9. Number of employees in Indigenous companies that work in midstream and downstream oil and gas (n=30)

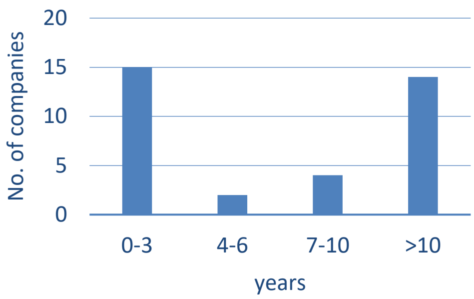

Figure 10. Time in operation of Indigenous companies that work in midstream and downstream oil and gas (n=35)

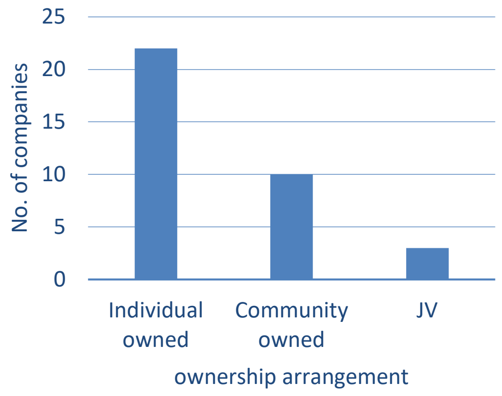

Figure 11. Ownership type of Indigenous companies that work in midstream and downstream oil and gas (JV=joint venture; n = 35).

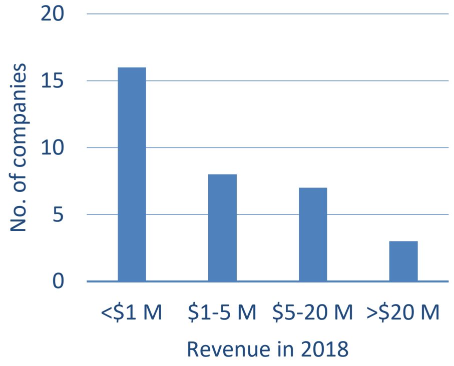

Figure 12. Revenue of Indigenous companies that work in midstream and downstream oil and gas (n = 34)

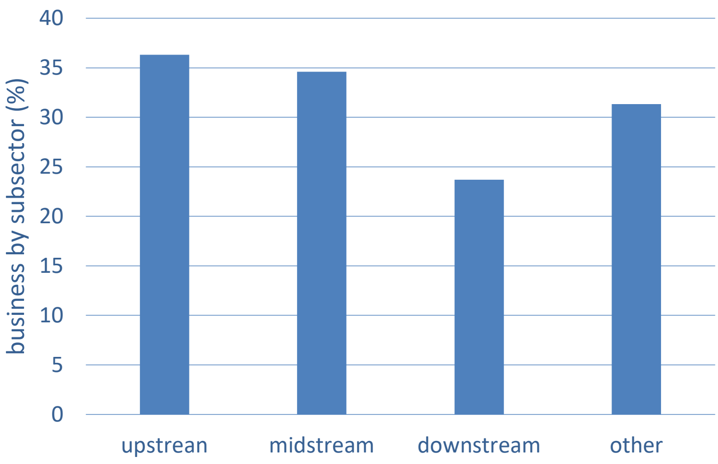

Figure 13. Subsector supported by Indigenous companies that work in midstream and downstream oil and gas (n = 34)

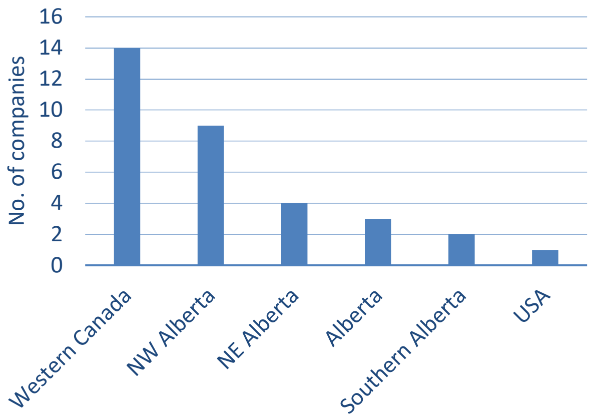

Figure 14. Region of operation by Indigenous companies that work in midstream and downstream oil and gas (n = 33; some companies work in multiple regions)

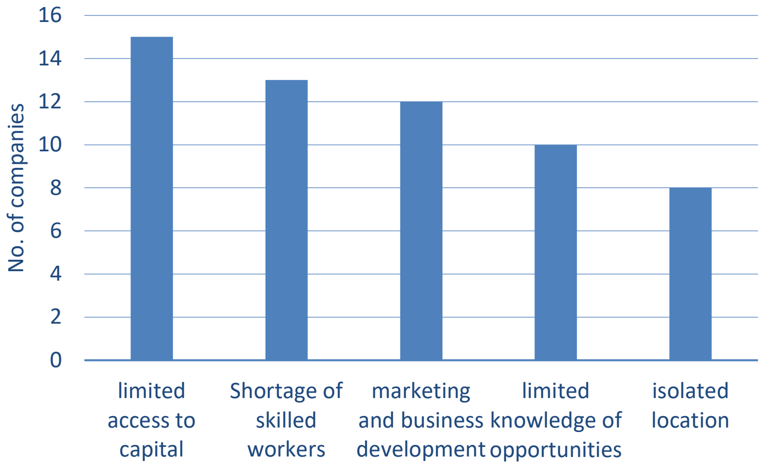

Figure 15. Impediments to business success reported by Indigenous companies that work in midstream and downstream oil and gas (n = 31)

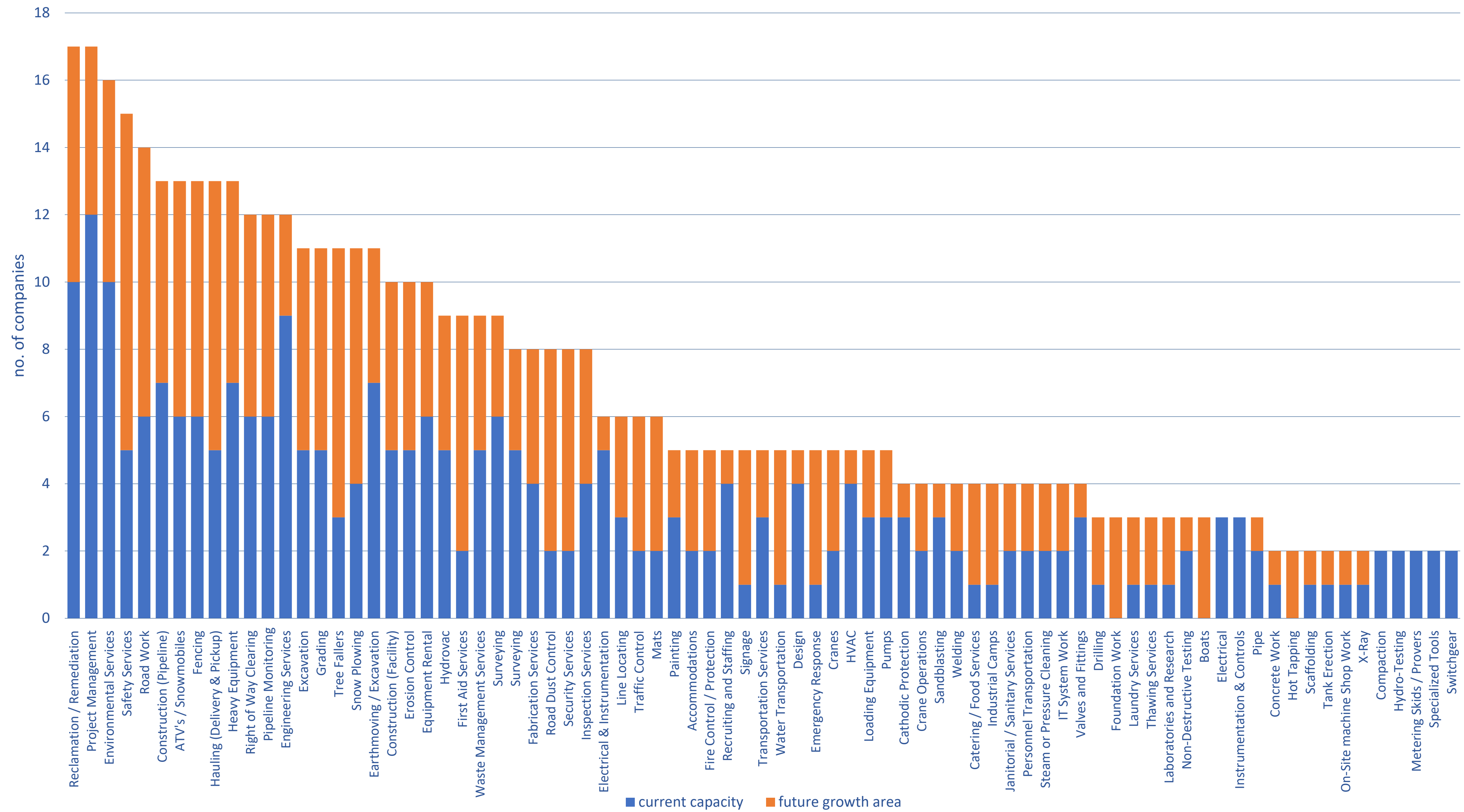

Figure 16. Current capacity and future growth areas reported by Indigenous companies

Strengths, Weaknesses, Opportunities and Threats for Indigenous Engagement in Midstream and Downstream Supply Chains

UNDRIP and the TRC recommendations have changed the competitive requirements of firms in Alberta, and Canada as a whole. As a result, the energy industry should aim to have 5% Indigenous procurement to maintain a competitive edge in the marketplace, at all points along the value chain - upstream, midstream and downstream. Five percent Indigenous procurement is a recommendation by the Canadian Council for Aboriginal Business, and is meant to reflect the percentage of the Canadian population that identifies as Indigenous[4].

A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis for Indigenous business engagement in midstream and downstream oil and gas supply chains was developed based on conversations with Indigenous companies and corporate firms, and results of the surveys discussed in this report (Figure 17). Internal factors to Indigenous firms that can be characterised as strengths include business acumen, their longstanding existence as a people, traditional knowledge and diverse perspectives. Weaknesses include limited access to capital for business investment (Figure 15), shortage of skilled workers (Figure 15), limited knowledge of opportunities (Figure 15), and the relatively small size of most companies (Figure 9).

External factors that can be characterised as opportunities include the UNDRIP, TRC Recommendations and the AIOC, provincial support of the oil and gas industry, and the unbundling of large contracts to facilitate participation by smaller firms. Threats include the relatively low commodity price of Canadian oil and gas and limited access to markets, as well as climate change, aggressive project schedules, large size of many projects, and the stereotyping of Indigenous companies.

Traditional knowledge is a factor that can add to a firm's competitive edge. Traditional knowledge refers to the knowledge, know-how, skills and practices that are developed and passed on intergenerationally by Indigenous groups[25].

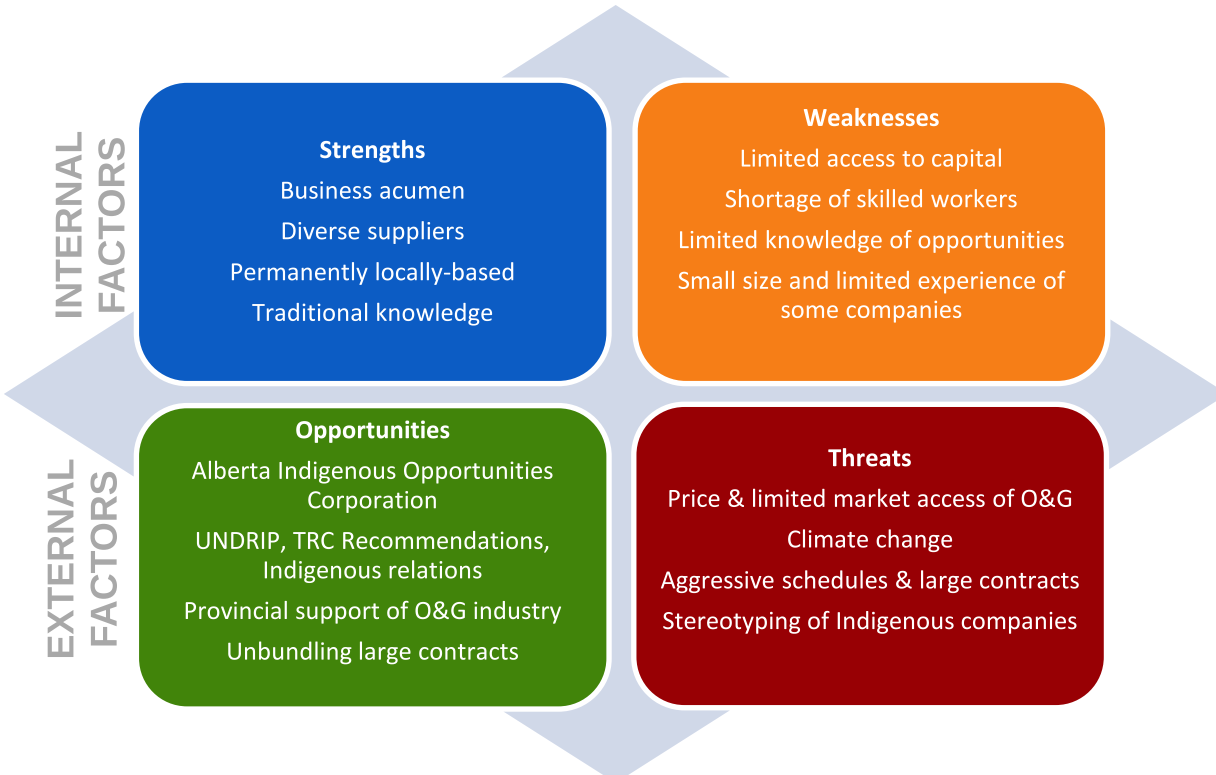

Figure 17. Simple SWOT analysis for Indigenous business engagement in midstream and downstream oil and gas supply chains (developed based on conversations with Indigenous companies and corporate firms, and results of the surveys discussed in this report)

Chapter 4. Recommendations for Increasing Indigenous participation in Midstream and Downstream Supply Chains

The following recommendations for consideration were developed from discussions with Indigenous companies and corporate firms who operate in the midstream and downstream oil and gas sector.

1. *Creating a NAABA or ROABA equivalent in Grande Prairie*

   The Northeastern Alberta Aboriginal Business Association (NAABA) and the Resource One Aboriginal Business Association (ROABA) are two nonprofits in northeastern Alberta that promote Indigenous business, industry communication and business development. We could not find an equivalent organization that would be responsible for promoting Indigenous businesses in northwestern Alberta. Such an organization could facilitate Indigenous business involvement in natural gas and other midstream and downstream opportunities, in a similar fashion to NAABA and ROABA's work facilitating Indigenous involvement in upstream activities in Northeastern Alberta.

2. *Indigenous involvement in Liquified Natural Gas (LNG) developments and supply chain*

   LNG is natural gas that is chilled to a temperature of about -160°C at atmospheric pressure, where it becomes a clear, colourless, odourless liquid. LNG occupies much less volume than natural gas (1/600th), making it easier to transport to Asian markets for example. There are 13 proposed West Coast Export Terminals in British Columbia (e.g. LNG Canada), as well as support from Indigenous groups such as First Nations LNG Alliance.

3. *Indigenous involvement in asset retirement, remediation and reclamation*

   Asset retirement will be a generation's worth of work (Edmonton Mayor, Don Iveson, February 2020). Though this is primarily an upstream oil and gas issue, midstream and downstream facilities such as pipelines, oil and gas processing plants, storage facilities and upgraders also require retirement and reclamation. Indigenous companies could conduct some of this work, especially as the provision of environmental services aligns with their world view and ties to the land.

4. *Establishing an office in Calgary*

   Some of the larger Indigenous firms that are owned by communities in rural, northern Alberta have a company representative or office in Calgary. Calgary is home to the head offices of most oil and gas companies that operate in Canada. Having an office in Calgary can facilitate easier business development and relationship building with corporate firms. This is a strategy that could be examined by Indigenous companies that do not yet have a presence in Calgary. Consideration of shareable office space occupied by a number of Indigenous companies could make costs affordable.

5. *Training and business capacity building*

   Commonly cited buyer companies' expectations and perspectives in procurement include the provision of fair and transparent estimates, well-written bids and proposals and registration with ISNetworld and ComplyWorks (Figure 8). To help level the field for Indigenous companies, the following training could be provided:

   - Estimator training
   - Proposal and bid writing
   - How to register with ISNetworld and ComplyWorks

   Inclusion of Indigenous companies and communities that offer services within the Western Canadian Sedimentary Basin (Figure 18; or broader) should be considered to foster a regional approach and collaboration. Having an annual event like the ones we developed would help to keep Indigenous companies informed of new developments.

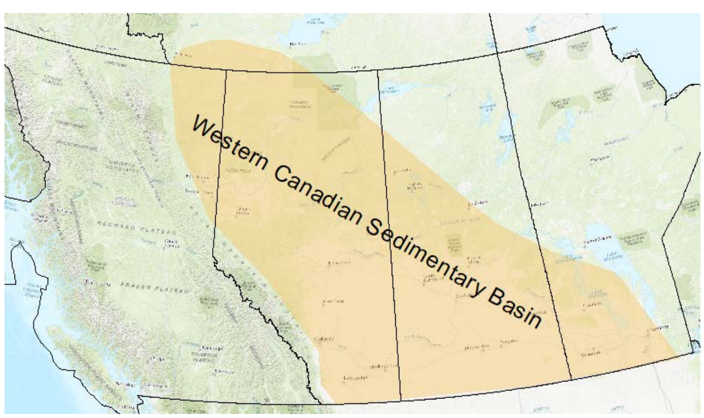

Figure 18. The Western Canadian Sedimentary Basin

6. *Equity investment and ownership of facilities*

   Equity investment and ownership of facilities is one way to bring a steady flow of income into Indigenous communities. Indigenous companies could invest in construction of a gas plant or small refinery on Indigenous land. This could provide a steady income stream to the community. Another strategy would be the purchase of a small pipeline company and gradually bringing Indigenous community workers into the company's workforce.

7. *Indigenous sister company*

   One supplier development strategy that corporate companies could employ is the creation of an Indigenous sister company mentoring program. The Indigenous company could benefit from the experience and know-how of the larger more established firm. This could result in enhanced relationship building between both parties.

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Appendix 1. Major midstream and downstream projects in Alberta that are proposed or under construction as of Q4 2019 (https://majorprojects.alberta.ca)

Name	Cost $ (in millions)	Municipality	Schedule	Sector	Type	Stage	Developer
Greenview Sour Gas Plant	50	Greenview No. 16		Oil and Gas	Gas	Proposed	Inception Exploration Ltd.
Hi-Q Pilot Plant	125	Bruderheim	2019 - 2020	Oil and Gas	Upgrader	Proposed	MEG Energy Corp.
Inter Pipeline Integrated Propane	3500	Strathcona County	2018 - 2021	Industrial	Chemical	Under Construction	Inter Pipeline Ltd.
Trans Mountain Pipeline Expansion	7400	Wabamun and others		Pipelines		Proposed	Government of Canada/Trans Mountain Corporation
Heartland Pipeline and TC Terminal	900	Wainwright No. 61 and others		Pipelines		Proposed	TransCanada Corporation
Alberta Carbon Trunk Line	1200	Strathcona County and others	2018 - 2019	Pipelines		Under Construction	Enhance Energy & Wolf Midstream
Calgary Urban Pipeline Replacement Project	450	Calgary	2017 - 2022	Pipelines		Under Construction	ATCO Pipelines
Sundance 7 Gas-Fired Power Plant	1600	Kapasiwin	2020 - 2022	Power	Natural Gas	Proposed	TransAlta / MidAmerican Energy Holdings
Genesee Generating Station Units 4 and 5 Project	1400	Kapasiwin	Commencing 2019	Power	Natural Gas	Proposed	ENMAX Energy Corp. / Capital Power Corp.
Milner 2 (M2) Power Generation Project	204	Greenview No. 16	Commencing 2019	Power	Natural Gas	Under Construction	MAXIM Power Corp.
Harvest Operations Gas Fired Power Plant	10	Flagstaff County		Power	Natural Gas	Proposed	Harvest Operations Corp.
Turner Valley Gas Plant Renovations	24	Okotoks		Oil and Gas	Gas	Proposed	Alberta Environment and Sustainable Resource Development
ATCO Heartland Generating Station	800	Strathcona County	2019 - 2022	Power	Natural Gas	Proposed	ATCO Electric Ltd.
Line 3 Pipeline Replacement	7500	Provost No. 52 and others	2017 - 2019	Pipelines		Under Construction	Enbridge Pipelines Inc.
Integrated Propane Dehydrogenation	4500	Sturgeon County	2019 - 2023	Industrial	Chemical	Under Construction	Canada Kuwait Petrochemical Corporation
North Wapiti Pipeline System	120	Saddle Hills County	Completion by 2019	Pipelines		Proposed	Keyera Corp.
Tidewater TransAlta Natural Gas Pipeline	150	Brazeau County and others	2018 - 2019	Pipelines		Under Construction	Tidewater Midstream
Keystone XL	10000	Cypress County and others	Commencing 2019	Pipelines		Under Construction	TransCanada Energy Ltd.
Bowden Re-refinery	90	Red Deer County	2019 - 2020	Oil and Gas	Upgrader	Proposed	Gen III Oil Corp.
CleanSEAS Demonstration Plant	100	Fort Saskatchewan	Commencing 2019	Oil and Gas	Upgrader	Proposed	Field Upgrading
NOVA NGTL Expansion	2400	Brazeau County|Saddle Hills County	2019 - 2020	Pipelines		Under Construction	TransCanada Corporation

Name	Cost $ (in millions)	Municipality	Schedule	Sector	Type	Stage	Developer
Duvernay Infrastructure Development	290	Greenview No. 16	Completion by 2019	Oil and Gas	Gas	Proposed	Pembina Pipeline Corporation
Empress Extraction Plant Fractionation	120	Cypress County	Completion by 2020	Oil and Gas	Gas	Proposed	Pembina Pipeline Corporation
Peace Pipeline Expansion Phase 6	280	Grande Prairie & Greenview No. 16	Completion by 2020	Pipelines		Proposed	Pembina Pipeline Corporation
Keyera Wapiti Gas Plant Phase 2	150	Greenview No. 16	2018 - 2020	Oil and Gas	Gas	Under Construction	Keyera Corp.
Cascade Power Project	1500	Yellowhead County	2020 - 2022	Power	Natural Gas	Proposed	Cascade Power
SinoCan Global Upgrader and Petrochemical Facility	8500	Lamont County	Commencing 2021	Oil and Gas	Upgrader	Proposed	SinoCan Global
Peace Pipeline Terminals and Infrastructure	120	Greenview No. 16	2018 - 2019	Pipelines		Under Construction	Pembina Pipeline Corporation
Nauticol Grande Prairie Methanol Plant	2000	Grande Prairie County No. 1	2019 - 2021	Industrial	Chemical	Proposed	Nauticol Energy Ltd
Three Creeks Power Plant	100	Peace No. 135		Power	Natural Gas	Proposed	Kineticor Resource Corp.
Chapel Rock to Pincher Creek Area Transmission	500	Cowley|Pincher Creek No. 9	2020 - 2023	Power	Transmission Line	Proposed	AltaLink
2021 NGTL System Expansion Project	1500	Greenview No. 16	2021 - 2022	Oil and Gas	Gas	Proposed	Nova Gas Transmission
Peace Pipeline Expansion Phase 7	950	Greenview No. 16|Saddle Hills County	2018 - 2021	Pipelines		Under Construction	Pembina Pipelines
Peace Pipeline Expansion Phase 8	500	Greenview No. 16	Completion by 2022	Pipelines		Proposed	Pembina Pipelines
Value Creation Heartland Upgrader	2000	Strathcona County	Completion by 2022	Oil and Gas	Upgrader	Proposed	Value Creation Inc.
Inter Pipeline Acrylic Acid Plant	600	Strathcona County	Commencing 2021	Industrial	Chemical	Proposed	Inter Pipeline Ltd.
Storage Cavern Development Program	125	Fort Saskatchewan	2015 - 2021	Oil and Gas	Distribution/Storage	Under Construction	Keyera Corp.
Key Access Pipeline System (KAPS)	1300	Alexander 134 and others	2019 - 2022	Pipelines		Proposed	Keyera Corp.
Viking Connector Pipeline	100	Castor and others	2019 - 2020	Pipelines		Under Construction	Inter Pipeline Ltd.
Hardisty Oil Terminal Storage Expansion	250	Provost No. 52	2018 - 2020	Oil and Gas	Distribution/Storage	Under Construction	Gibson Energy Inc.
Hardisty Oil Terminal Storage Expansion	40	Provost No. 52	2019 - 2020	Oil and Gas	Distribution/Storage	Under Construction	Gibson Energy Inc.
Kaybob South #3 Cogeneration Plant	105	Greenview No. 16	2019 - 2021	Power	Natural Gas	Proposed	SemCams and TransAlta

Appendix 2. Comments received from Indigenous companies who attended the Training and Business Development event.

A great event and definitely and wish he best, would love to present one day about Duncans FN and some of the successes we have. But some good presenters and appreciate the invite. Need more of this awareness in Grande Prairie for indigenous opportunities
I was amazed at how much information was shared there will do it again
I just want to say that all of the presenters did an amazing job. I especially liked the one from Jared with NTL.
My biggest take away from the event is having key people under one roof, it not only opened the doors for communication it provided direct access to key personal for further engagement.
Very informative and good potential business relations
Well put together with excellent business opportunities. Would like to attend future events of this nature.
it would be beneficial if the companies attending also had a 5 minute elevator pitch ready and presentable.
It was a great event and I can tell it will only get better and grow over time so nice work on bringing in some good quality speakers and the One on One meetings were a very high value for a company like Pro Paint.
Obviously Day 1 was more critical than Day 2. I like to see something on key items in terms what it takes to be a good supplier. Many companies have a pre-qualification process where they will evaluate the supplier on set of criteria such as safety, quality, technical capabilities, etc.
Great event for networking. It a good idea to do the introductions on Tuesday morning to get an idea of who all the participants were. Also, I agree that this forum should be kept small and intimate; too many would make it a challenge to network with everybody.
Excellent event, hopefully not the last
What a great opportunity for smaller companies
This was very interesting event and i have learn many new things in the processes. i hope that i will be able to attend more in the future.
Great Event
The first day had excellent presenters and the content was very insightful.
It was a good event and the networking was very beneficial to my company.
The event was great! lots of information shared and the intimate size of the event made it easy to make connections.
The meeting facilitated market planning information for First Nation governments, that was not previously available.
There has been little outreach or follow up by companies looking to diversify their supply chains. I appreciate that the companies attending said all the right things but most of the companies at these events don't do the hard work of engaging smaller businesses on an intake process to diversify their supplier base. Most companies have also consolidated their suppliers so there is an opposing trend of reducing the number of vendors that companies utilize. I did not see any meaningful movement by companies that had opportunities to engage a unique company like mine.
We are awaiting our COR then we will be following up with the pre-qualification list.
Was a great seminar, looking forward to the next one!
Its great to see the Gov of Alberta Taking a lead on making these connections.

Great event, we enjoyed the ability to request/host meetings throughout the conference and for the more intimate smaller sized attendance. Capacity for a bit more to attend while still keeping it small to mid sized. We had a great experience overall and made some new business contacts.
The sessions were constructive from an information point of view. I have reached out to many of the companies and contacts in attendance and received limited response. We remain hopeful that it will translate into future opportunities.
Great networking opportunities
networking event resulted in new opportunities. they have resulted in meetings post event.
I was pleasantly surprised by the atmosphere and real business opportunities available at the event.
This was a very informative meeting for my company. Understanding about some of the insurances we have been asked to get for certain clients, why this insurance. I was very surprised to hear some of the speakers did not hire alot of Indigenous or their percentage was low and they are looking at changing this. We have been hiring Indigenous and other ethics groups for years. This event really helped us to continue to stay up to date with Reconcilation events. Already been booked for the next Forward Summit which we attended this past year the last one. Being Metis I do attend the monthly Region 3 Metis Meetings and other events they post. Very informative information is presented.

Appendix 3. Comments received from midstream and downstream buyer companies/presenters at the Indigenous Business Development and Training events

Good forum and good to see representatives from Indigenous groups, Industry, and Government come together to share ideas and thoughts. Would have benefitted from a tradeshow style showcasing for what we would be looking for. Good feedback from Organizers (Mario) on what information can be leveraged to better inform the audience of why large proponents like TC Energy operate and do business like we do. Always glad to engage and participate with local Indigenous groups where we engage and operate and we look forward to continued participation moving forward.
Thank you for the invitation to Nauticol Energy to participate and present. Well run, good room, great speakers. Thanks for coming up to Grande Prairie
I thought this was a well organized event, had a diverse range of companies speaking and was well attended. We were very pleased to be part of it and hope to be included in the future.
We don't have followup meetings scheduled yet, but we likely will meet with a few of the companies in the near future. It was a very well-organized event that provided a lot of opportunity for one-on-one conversations.
I would like to congratulate InnoTech on the first session. I found it to be the right size of audience and the right diversity in speakers (owners & contractors). For me, I would like to hear more from the other presenters of what potential projects are available. Plains Midstream did an excellent job of showcasing their potential work forecast. I think some others could of done a better job of outlines opportunities. I really enjoyed the breakout sessions where my organization was able to meet in one-on-one with other companies. I have asked Peter for the Edmonton session if he could accommodate us having more one-on-ones and it appears we can. Which is great to hear. If InnoTech was considering a third session, our organization would welcome the opportunity to be a presenter.

Appendix 4. Fuel stations with Indigenous ownership or located on reservations in Alberta (according to the RezGas website[22])

Fuel Station	Location
Arrowwood Co-Op Association Ltd	Arrowwood, Alberta
Ter-Pek Gas & Confectionery Ltd.	Atikameg, Alberta
Lone Wolf Gas & Grub Ltd.	Brocket, Alberta
Cadotte Store	Cadotte Lake, Alberta
Jc Gas Bar	Cadotte Lake, Alberta
Calais Corner Store Ltd.	Calais, Alberta
Timber Wolf Convienence Store	Calais, Alberta
Driftpile Gas And Convenience Store	Calgary, Alberta
Tsuu Tina Nation Gas Stop	Calgary, Alberta
Belly River Ltd.	Cardston, Alberta
White Quills Gas Bar	Cardston, Alberta
Jayzgas Bar	Chard, Alberta
Cj Pizza	Chateh, Alberta
R & S Enterprises - Gas Bar	Chateh, Alberta
Petro Canada Gas Bar & Convenience Store*	Cold Lake, Alberta
Paul Band Service	Duffield, Alberta
Kehewin General Store	Edmonton, Alberta
Ote Nikan Gas Station (Petro Canada)*	Edmonton, Alberta
Enoch Cree Nation Oskya Gas Bar*	Edmonton, Alberta
Ray's Gas Bar	Enilda, Alberta
North On 60 Gas Bar & Convenience Store Ltd.	Enoch, Alberta
Fort Petroleum Corporation	Fort Chipewyan, Alberta
Mikisew Trappers Limited Partnership	Fort Chipewyan, Alberta
Alberts Gas Bar & Confectionary	Fort Macleod, Alberta
Tall Cree Service Centre	Fort Vermillion, Alberta
Frog Lake Stop And Go Ltd.	Frog Lake, Alberta
Alexis Service Centre Inc	Glenevis, Alberta
Willow Gate	Glenevis, Alberta
Cardinal's Cash 'N Carry	Goodfish Lake, Alberta
Carl Bull's Gas & Mini Mart	Goodfish Lake, Alberta
Raven's Nest	Gregoire Reserve, Alberta
Coyote Gas & Things	Grouard, Alberta
Bushie Store	High Level, Alberta
Cha Services Inc.	High Level, Alberta
Garden River Store	High Level, Alberta
John D'or Prairie	High Level, Alberta
Bow-N-Arrow Convenience Store	Hobbema, Alberta
Daystone Convenience Store	Hobbema, Alberta
Louis Bull Service Center	Hobbema, Alberta
Montana Willow	Hobbema, Alberta
Willow Gas Bar	Hobbema, Alberta
Dee's Grocery and Gas Bar	Hythe, Alberta
Ruby's Gas Bar	Joussard, Alberta
Ty's Gas Station	Kehewin, Alberta
Heart Lake Truck Stop	Lac La Biche, Alberta
Tina's Smoke Shop	Lac La Biche, Alberta
Thunder Chief Service Station	Lethbridge, Alberta
Loon River Gas & Confectionary	Loon River Via Red Earth,
Okeymowkisik Gas Bar	Maskwacis, Alberta
Chiniki Gas Bar	Morely, Alberta
Wesley Band	Morely, Alberta
Black Bear Service & Foods	Morinville, Alberta

Fuel Station	Location
Eden Valley Gas Bar	Morley, Alberta
Stoney Trading Post	Morley, Alberta
Bighorn Service	Nordegg, Alberta
Shell - Stony Plain	Parkland County, Alberta
Simon Lake Gas Bar	Peace River, Alberta
Pincher Creek Co-Op	Pincher Creek, Alberta
Big Moose Store	Rocky Mountain House,
Sunchild Store Ltd	Rocky Mountain House,
Bison Auto Stop Ltd.	Saddle Lake, Alberta
Eugene's Gas Bar	Saddle Lake, Alberta
Four Bros	Saddle Lake, Alberta
Northside Gas Bar	Saddle Lake, Alberta
Saddle Lake Store	Saddle Lake, Alberta
Arrowhead Gas Bar	Siksika, Alberta
M And R Gas Station	Siksika, Alberta
Siksika Service Station Ltd.	Siksika, Alberta
Max Fuel Distributors Ltd.	Slave Lake, Alberta
Sawridge Truck Stop	Slave Lake, Alberta
Swan River Gas Bar	Swan River, Alberta
O'chiese Gas Bar Ltd.	Sylvan Lake, Alberta
Bigstone Grocery Store	Wabasca, Alberta
Bigstone Truckstop	Wabasca, Alberta
Eagle River Husky	Whitecourt, Alberta

*newly opened and not yet included on the RezGas website as of this writing