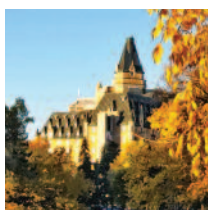
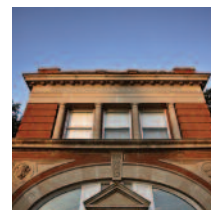




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“There have always been challenges in Saskatchewan, but there have always been more opportunities and as your provincial chamber, we will work with you to make sure we tackle those challenges together.”

**Steve McLellan,
Chief Executive Officer**

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Message from the Chair



I am honoured to serve as the Chair of the Saskatchewan Chamber of Commerce. As a Partner with MNP LLP with a focus on serving Private Enterprise clients, I am very aware of the important role our Chamber plays in making connections and serving as the voice of business in our wonderful province. 2018 was a busy year for the Chamber as our economy was presented with new opportunities and challenges.

In May we attended a "Day on the Hill" in Ottawa to emphasize the importance of constructing the Trans Mountain Pipeline. Trans Mountain served to highlight the need for our country to fix our regulatory system. Saskatchewan and Canada must ensure we are able to capitalize on our economic interests in a timely manner to be able to deliver our products to the world.

The Chamber continues to advocate against a carbon tax, despite the federal government's announcement that a carbon tax will be implemented in April 2019. The determination of whether the federal government has the constitutional authority to impose a carbon tax will be closely monitored. The Chamber's policy continues to be that innovation and investment incentives are the most effective way to reduce greenhouse gas emissions, while protecting our economy.

International trade is very important to the Saskatchewan economy. The removal of NAFTA and heated negotiations over a new trade deal created significant uncertainty for our country and province. In September, the signing of the United States-Mexico-Canada Agreement, (USMCA) provided business with opportunity and direction on how to manage cross border trade.

October 17, 2018 saw the legalization of recreational cannabis in Canada. We have observed the creation of a variety of new business ventures and products. The Chamber partnered with WorkSafe Saskatchewan to provide guidance to employers on the challenges faced with the introduction of Bill C-45.

Our Chamber moved to a new office this summer with an amazing boardroom and a more convenient and accessible location for our members. Our new office has allowed the Chamber to host workshops, meetings and training sessions. If you were unable to attend our open house, please be sure to stop by for a visit.


We are excited with the province's introduction of a new Financial Literacy component for our Saskatchewan school curriculum this year. The Chamber has been an advocate on this issue for a number of years and, as a father of four, I am very pleased with the investment our province is making in our youth by helping to better prepare our high school graduates.

We thoroughly enjoyed connecting with members and government officials over the past year at our events. Saskatchewan is home to an active and engaged business community, and it continues to be a privilege to support that community through the work of the Chamber.

Clayton E. Veresh
Chair

message

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T: 306.649.6542
E: sean.devin@mnp.ca



Message from the Chief Executive Officer



2018 was...an interesting year!

The old blessing 'may you live in interesting times' is intended to offer a positive wish upon a person's life. Clearly, we had some very positive outcomes in the 2018 business year and, as always, even the challenges became opportunities.

After a couple years of weak commodity prices hitting our national economy hard and Saskatchewan's even harder, we continue to survive. Just as business has done for decades, when one area struggles, another finds their opening and provides jobs and investment. The growth generated by the Protein Industries Canada supercluster announcement will mean great things for this province.

The year has been a busy time in this Chamber, and I am pleased to report a very successful year. We were active on the advocacy front on market access, regulatory reform, taxation and of course, carbon taxes. While all decisions we wanted have not been made, we clearly made significant progress.

Our office was 'on the move' in many ways, especially when we moved our physical location to give us more space and opportunity to host important training sessions for our members on Mental Health, Indigenous Awareness, and other business basics.

2018 was also an exceptional year for our events, with most sold out and receiving great sponsor support. ABEX was fabulous and over 750 people attended to support Saskatchewan business.

Our Board of Directors has always had some change over, but the loss of Greg Hanwell to cancer left a big hole in the Saskatchewan business voice of reason.

To the Board, members, and especially the staff, I thank you. Together we truly made Saskatchewan a better place to live, work and invest.

Steve McLellan,
Chief Executive Officer

message



Naturally Innovative

We see innovation in hardship.
We see beauty in the struggle to succeed.

We understand the intrinsic nature of innovation that is required to thrive in business in our province.

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Board of Directors



Clayton Veresh

2018-19 Chair
MNP

“The **diversity** of Saskatchewan business is very exciting. Saskatchewan **entrepreneurs** are resilient, and they must be agile.”



Patricia Warsaba

Immediate Past-Chair
McKercher LLP

“What is exciting about business in **Saskatchewan** is the change in attitude in the last decade or so. **Business** is now about how things can or should be in Saskatchewan with self-imposed barriers or negativity no longer existing.”



Valerie Sluth

1st Vice-Chair
Praxis Consulting Ltd.

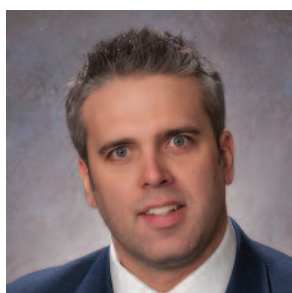
“Doing business in Saskatchewan means being diverse: interacting with **local** entrepreneurs, global corporations, all governments, agencies and non-profits. What can be more exciting and inspiring than the creativity that our **business** environment demands?”



Monica Kreuger

2nd Vice Chair
Global Infobrokers Inc.

“We are a province full of entrepreneurs with **ideas** that have no boundary – diverse, small, **growing**, young, mature, service, manufacturing, tech – we have it all.”



Greg McIntyre

Director
Royal Bank of Canada

“What I find most **inspiring** about Business in Saskatchewan is the **entrepreneurial** optimism that is driven with our strong, prairie work ethic.”



Thomas Benjoe

Director
FHQ Developments

“As we pursue economic **growth** in Saskatchewan it is vitally important that we do it *with, by and for* everyone in our economy. This will ensure **everyone** benefits from the opportunity.”



Bruce Bodine

Senior Vice President
The Mosaic Company

“Saskatchewan business **leaders** show a level of ingenuity I haven’t seen in other jurisdictions. The people are collaborative, are focused on creating new **opportunities** and don’t let challenges stand in their way.”



Mary Weimer

Director
Conexus Credit Union

“Every day, I’m lucky to be able to **connect** with all types and sizes of businesses. I am always learning from and being inspired by **Saskatchewan** business owners.”



Jenna Moore
Director
Central Plains Co-Op

"Business in Saskatchewan continues to be **inspiring** due to its diversity, strength and **perseverance**."



Sara Wheelwright
Director
Trusted Marketing Services

"**Prairie** Entrepreneurs across all sectors are not afraid to collaborate or break industry moulds."

The land of big **skies** AND big opportunity!"



Khurrum Awan
Director
Miller Thompson LLP

"The ability of our local businesses to **innovate** and adapt to the cycles of the national and international **economy** is inspiring."



Evan Doepker
Director
Doepker Industries Ltd.

"People in Saskatchewan have a "**Get it done**" mentality when it comes to satisfying the needs of a customer. Barriers to customer satisfaction are only an **opportunity** to solve a problem and get better in some way."



Natasha Stinka
Director
Canpotex

"The **enthusiasm** and creativity of Saskatchewan's entrepreneurs is **unparalleled**!"



Greg Hanwell
1971 - 2018

Greg Hanwell will be remembered as an advocate for the underdog and his drive to challenge the status quo has made Saskatchewan a better place. The Chamber staff knew him as an eloquent speaker, a strong leader and Board member, and as someone who was always willing to help out in any way he could, from contributing to the policy development process to rolling up his sleeves and stacking chairs after an event.

Staff



Steve McLellan
Chief Operating Officer

Steve is responsible for overseeing operations, strategic planning, reporting to the Board, representing the Chamber with various organizations, and representing the Saskatchewan Chamber in the media.



Dawn Boxall
Director of Finance and Administration

As the Director of Finance and Administration, Dawn is responsible for the accounting functions of the Chamber, as well as managing all reception tasks and providing administrative support to the CEO. She also coordinates and supports the Board of Directors in their meetings, elections and processes.



Michele Geres
Director of Programs

The Director of Programs is responsible for coordinating all in-house training activities, regional business tours and international tours. This position also assists with writing, editing and proofreading Saskatchewan Chamber of Commerce communications.



Joshua Kurkjian
Director of Research & Policy Development

Joshua's primary role is to research and develop policy on issues and opportunities for business in Saskatchewan. He also works to gather direct input from Chamber members and selected experts to ensure the Chamber has the best information on current and emerging issues.



Elissa LaLiberte
Director of Membership Engagement

Elissa is the liaison between the Saskatchewan Chamber of Commerce and its members, ensuring that the Chamber is engaged with its membership in all areas with specific leadership on sponsorships.



Morgana van Niekerk
Director of Marketing & Communications

Morgana is responsible for creating and managing the Chamber's internal and external communication plan, as well as ensuring that the Saskatchewan Chamber continues to be known as the Voice of Saskatchewan Business.



Lorie Willms
Director of Membership Sales

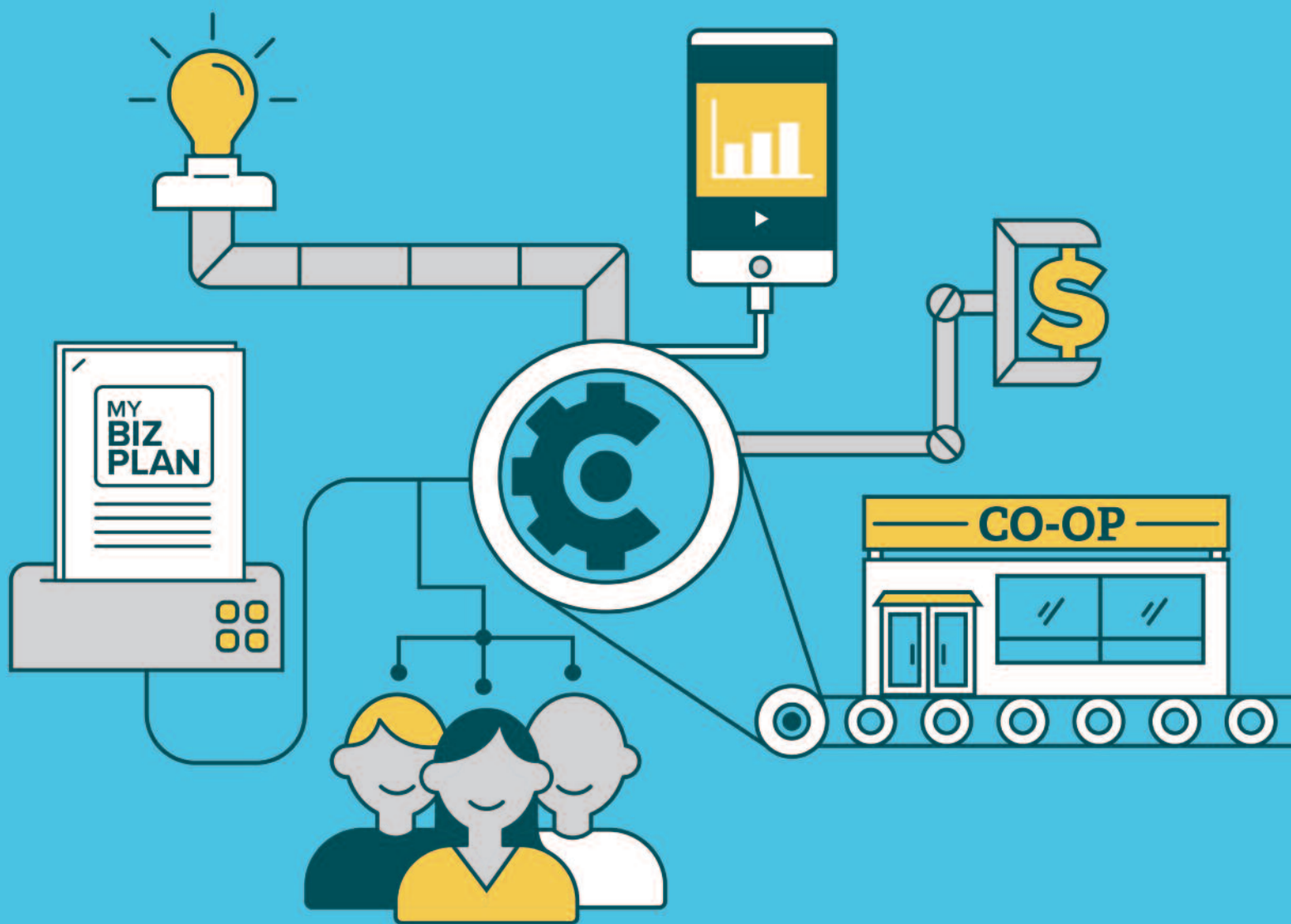
As the Director of Membership Sales, Lorie's primary role is to promote the membership benefits of the Saskatchewan Chamber of Commerce. She maintains a close working relationship with the business community in Saskatchewan.



Rene Wood
Director of Special Events

Rene is responsible for the coordination of all Saskatchewan Chamber events.

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Financial Statements

Statement of Operations

For the year ended December 31,	2018	2017
Revenues		
Business memberships	\$ 539,395	\$ 560,974
ABEX Awards	270,823	249,605
Chamber group insurance	203,424	208,506
Member services	115,478	80,942
Political Forum	30,875	23,875
Local chamber memberships	31,760	35,910
Publications	28,137	7,740
Conference	27,980	25,200
General administration revenue	19,302	13,161
Interest income	16,426	15,912
Summer student grant	4,546	3,284
Loss on disposal of leasehold improvements	(5,365)	-
	1,282,781	1,225,109
Expenditures		
ABEX Awards	146,570	132,926
Amortization of equipment	12,276	5,697
Amortization of intangible assets	1,827	1,827
Committees	57,010	69,696
Communication	17,499	11,269
Conference	12,850	8,760
Member services	98,366	42,814
Office and administration	63,080	57,890
Political Forum	15,557	11,466
Professional fees	51,832	42,939
Rent	99,170	90,025
Research campaign	1,000	-
Salaries and related benefits	687,861	703,122
Telephone and utilities	10,775	12,005
Travel	29,578	23,385
	1,305,251	1,213,821
Excess (deficiency) of revenues over expenditures	\$ (22,470)	\$ 11,288

Financials continued on page 11.

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AIM
FIRE?**

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Financial Statements

Statement of Financial Position

December 31,	2018	2017
--------------	------	------

Assets

Current

Cash	\$ 32,053	\$ 157,128
Short term investments	643,341	671,816
Accounts receivable	97,957	85,441
GST receivable	3,075	2,983
Prepaid expenses	15,251	1,692
Due from related parties	60,415	5,996

852,092	925,056
---------	---------

Equipment

65,350	19,458
--------	--------

Intangible asset

2,740	4,567
-------	-------

\$ 920,182	\$ 949,081
------------	------------

Liabilities

Current

Accounts payable and accrued liabilities	\$ 78,496	\$ 103,483
Deferred revenue	278,778	260,220

357,274	363,703
---------	---------

Net Assets

Internally restricted funds	300,000	300,000
Unrestricted funds	262,908	285,378

562,908	585,378
---------	---------

\$ 920,182	\$ 949,081
------------	------------

Audited financial statements available at www.saskchamber.com

A photograph of four men, identified as 'The Priers', standing together in front of industrial structures. They are all wearing white hard hats with the Mosaic logo and names (Jack, Prier, Eldon, Prier), and high-visibility yellow safety jackets with reflective stripes. The man on the far right has a mustache. They are standing in front of a large, dark metal framework and a tall, white industrial tower with the Mosaic logo on top. The sky is clear blue.

Together, we're creating a legacy we can all share.

The Priers

At Mosaic, we believe our success is rooted in our people. Generation after generation, we've built a company and community where they can grow. Through innovation, sustainability and strength – our commitment reflects their efforts to create a legacy we can all share. Together, we can see tomorrow from here.

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The SCC boardroom

New Office Space and Boardroom



In July 2018, the Saskatchewan Chamber of Commerce relocated its offices after almost 30 years in the Chateau Towers at 1920 Broad Street in Regina.

Now located at the Executive Terrace Building at #200-2221 Cornwall Street, the SCC offices feature a large reception area, spacious offices, studio and small meeting room, and a large modernized boardroom. With the move, the SCC has increased its overall capacity by almost 1,500 square feet.

The SCC boardroom is newly equipped with a state-of-the-art interactive display system that provides both presentation and video conferencing capabilities. New boardroom tables and chairs allow for easy conversion to any format, from classroom style to boardroom style, and can comfortably accommodate up to 24 people.

The SCC is proud to feature office and boardroom furniture made by CWI Manufacturing based in Osler, Saskatchewan.

A special thanks goes to Linely Schaeffer with ICR Commercial Real Estate Regina for helping the SCC find its new home; John Ziegler from Business Furnishings for his help in securing the SCC's new office furnishings; and Colliers International for their support while the SCC transitioned to its new home.

SCC
Office



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WORKING WITH INDUSTRY TO DEVELOP THE NEXT GENERATION OF ENTREPRENEURS



Val Sluth has been appointed the **RBC Woman Executive in Residence** and **Bradyn Parisian** has been appointed the **Rawlinson Executive in Residence in Indigenous Entrepreneurship**. Their programs will promote entrepreneurship among women and Indigenous students. Their presence in our business schools will have a lasting impact on our students' experience and the future of our business community.

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wastewater for the purpose
of steam production.**

Association of Chamber of Commerce Executives (ACCE)



acce

In 2018, the Saskatchewan Chamber of Commerce was nominated as a finalist for the 2018 Chamber of the Year Award by the Association of Chamber of Commerce Executives (ACCE) in the State/Province category.

“This is a great achievement for us and we are proud to represent Saskatchewan and Canada.”

Steve McLellan
CEO, Saskatchewan Chamber of Commerce

Along with detailed analysis on #TransformSK and the Renewable Energy Report, the SCC's Chamber of the Year submission also

highlighted strategies for supporting the business community through future challenges and discussed the importance of a diverse group of engaged Board members. The Chamber's marketing activities, member services and government relations activities were also an important aspect of the judging process.

Steve McLellan, Curtis Hemming and Morgana van Niekerk attended the ACCE Annual Conference in Des Moines, Iowa from July 14 - 17, 2018 where the final judging and interviews were held to determine the Chamber of the Year recipient. Nominations were reviewed and evaluated by a committee of veteran chamber executives and former Chamber of the Year recipients.

The Saskatchewan Chamber of Commerce was proud to be

selected among the top two State and Provincial Chambers in North America, with the Hawaii Chamber of Commerce ultimately winning the Chamber of the Year Award in 2018.

During the four-day conference the Saskatchewan Chamber team also attended seminars on membership development, event planning, and online marketing.





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Canadian Chamber of Commerce



The Saskatchewan Chamber of Commerce (SCC) collaborated with the Canadian Chamber of Commerce on several key advocacy activities in 2018.

On May 23, 2018 the Canadian Chamber lead a day of support for Trans Mountain Pipeline in Ottawa which Chair, Clayton Veresh and CEO, Steve McLellan attended on Parliament Hill. The day of support included meetings with Minister of Finance Bill Morneau, then Minister of Natural Resources Jim Carr, Leader of the Opposition Andrew Scheer, the Independent Senators Group, and the Steel Caucus. In October the Canadian Chamber organized *Ottawa Hill Day: Building a Canada that Wins* and was attended by delegates from the SCC. The meetings focused on several key areas which are critical in helping Canadian businesses remain competitive.

In 2018 Patricia Warsaba, Partner, McKercher LLP and Past-Chair of

the Saskatchewan Chamber of Commerce served on the Board of the Canadian Chamber of Commerce. Leanne Bellegard, Inclusion Specialist, Nutrien also served on the Board in 2018. John Lagimodiere, President, ACS Aboriginal Consulting Services is also working with the Canadian Chamber of Commerce; he is the Chair of the CCC Indigenous Affairs Policy Committee.

The Canadian Chamber of Commerce held its AGM and Convention in Thunder Bay in September. The SCC was in attendance and participated in the annual policy session and a variety of other sessions, including a Saskatchewan/Manitoba Policy Caucus.




THE CANADIAN
CHAMBER
OF COMMERCE

Top left: Steve McLellan attended a briefing in Ottawa with Finance Minister Bill Morneau

Top right: Hon. Ralph Goodale and Steve McLellan

chamber



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Chair's Invitationa

The 2018 Charis Invitational Dinner was held at the Conexus Art Center on November 27th, 2018, with over 200 guests.

The Saskatchewan Chamber of Commerce had the opportunity to host delegates from provincial government, as well as business leaders and members from throughout Saskatchewan and beyond. This event is specifically for members to engage with, and provide feedback directly to the elected officials, in order to contribute to the economic landscape in our province.

The evening was filled with insightful conversations, including discussions regarding the impacts of the legalization of cannabis, mental health services, and infrastructure in the province.

Thank you to the sponsors: Enbridge, Leadership Source Inc, LifeLabs, Lyft Inc, and RBC Financial.

Right: Wes Jickling, CEO of Innovation Saskatchewan and Deputy Minister of Intergovernmental Affairs



al Dinner

Top left: Kirk Westgard, Assistant Deputy Minister Economic Development, Ministry of Trade and Export Development

Top right: Clayton Veresh, SCC Chair, with Cam Swan, Deputy Minister to the Premier

Bottom: Saskatchewan Government representatives at the Chair's Invitational Dinner





Over 1,000 scientists from around the world use Canadian Light Source every year, working to solve humanity's biggest problems in health, energy, agriculture, and the environment.

Events

Left: 2018 Deputy Minister Breakfast

Right: Premier Scott Moe and Steve McLellan at 2019 Political Forum



Deputy Ministers Breakfast

The Deputy Ministers Breakfast was held on April 24th 2018, at the Double Tree in Regina. Over 200 guests including Deputy Ministers, Crown Corporation Presidents, and Chiefs of Staff attended this important event.

The event gave the members a platform to ask questions and gain insight on topics that may potentially impact their businesses.

Thank you to the sponsors: Chartered Professional Accountants of Saskatchewan (CPA) and the Mosaic Company.



Political Forum 2019

Political Forum took place on January 23, 2019 at the Delta Hotel. This annual event, which has been taking place since 1977, hosted close to 200 attendees and continues to be a great way for members to discuss issues, concerns or barriers to success with Saskatchewan's elected officials.

There were 13 ministers in attendance and 7 Opposition Critics. The Panel session was engaging and insightful. A broad representation of the membership was present, and many key topics were addressed.

Thank you to the sponsors: McKercher LLP, Deloitte, Federated Co-operatives, Scotiabank and The Mosaic Company.



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ABEX



The Saskatchewan Chamber of Commerce is immensely proud to support these businesses year after year, and to recognize their excellence at Saskatchewan's most prestigious business event of the year, the ABEX Awards, presented by Conexus Credit Union. The recipients and nominees are brave entrepreneurs who took a chance on a dream and through perseverance achieved success!

The 35th ABEX Awards took place in Saskatoon, on October 20th, 2018 at TCU place with more than 700 attendees. The silver and purple color scheme lit up the room, and the orchid accents on the tables made for the perfect atmosphere to celebrate so many great achievements.

Meridian Surveys was inducted into the Saskatchewan Business Hall of Fame, for its over 50 years of business excellence in the Canadian surveying industry. Grant J. Kook took home the

Business Leader of the Year Award, as he embodies what this award represents – an individual who exemplifies the qualities of a business visionary. Grant has shown outstanding dedication and continues to make significant contributions to the local business community.

Donald E. Kramer was posthumously named the Community Leader of the Year, with his family accepting this award on his behalf. This award is given to an individual who has made a positive contribution to the community through volunteerism and philanthropy, and who has taken a lead role in developing solutions to social challenges.

Linda Machniak from the Battleford's Chamber was this year's winner of the Roger Phillips Chamber Builder Award. This award is specifically for individuals who have a long-standing history of committing time, thought leadership, and guidance to the chamber network in Saskatchewan, and with Linda's 17 years at the Battlefords Chamber, she is certainly deserving.

This year, 77 ABEX nominations were received and 50 finalists were selected. The dedicated team of independent judges spent hours pouring over every application. Congratulations to

every nominee, recipient and all entrepreneurs throughout Saskatchewan – you are the reason we celebrate business excellence!

We would like to extend our sincerest gratitude to our sponsors: Conexus Credit Union, Saskatchewan Polytechnic, World Trade Center Saskatoon at Prairieland Park, Saskatchewan Trade and Export Partnership, Cogent Chartered Professional Accountants LLP, Saskatchewan Indian Gaming Authority, University of Regina, SaskEnergy, Cameco, PFM Capital Inc., Handy Special Events, Saskatchewan Ministry of Trade and Export Development, David Aplin Group, WorkSafe Saskatchewan, Chartered Professional Accountants Saskatchewan, ISC, EVRAZ N.A., Nutrien, Miller Thomson LLP, Saskatchewan Construction Safety Association, Crowe MacKay, Doepker Industries Ltd., Innovation Saskatchewan, SaskTel, Regina Leader Post, Saskatoon Star Phoenix, ICR, Minard's Leisure World, Island Web Design + Creative, directwest, Great West Life, London Life and Canada Life.

Top left: Grant J Kook received the Business Leader of the Year Award.

Top right: Tim Kramer accepted the Community Leader of the Year Award on behalf of his father Donald E. Kramer.

awards

ABEX 2018 Award Winners



Grant J. Kook
Business Leader of the Year
Sponsored by University of Regina



Donald E. Kramer
Community Leader of the Year
Sponsored by SaskEnergy



Haylie Lashta
Warman Physiotherapy & Wellness
Young Entrepreneur
Sponsored by Cameco



Historic Reesor Ranch
Service
Sponsored by World Trade Center Saskatoon Prairieland Park



Industrial Machine & Mfg. Inc.
Business of the Year
Sponsored by David Aplin Group



InfraReady Products (1998) Ltd.
Innovation
Sponsored by Saskatchewan Polytechnic



Ironsides Energy Services Ltd.
New Venture
Sponsored by Saskatchewan Ministry of Trade and Export Development



Luxury Granite
Marketing
Sponsored by Handy Special Events



Meridian Surveys
Saskatchewan Business Hall of Fame
Presented by Connexus Credit Union



Linda Machniak
Roger Phillips Chamber Builder Award



Orano Canada Inc.
Priority Focus – Mental Health
Sponsored by Saskatchewan Indian Gaming Authority



Industrial Machine & Mfg. Inc.
Export
Sponsored by Saskatchewan Trade and Export Partnership (STEP)

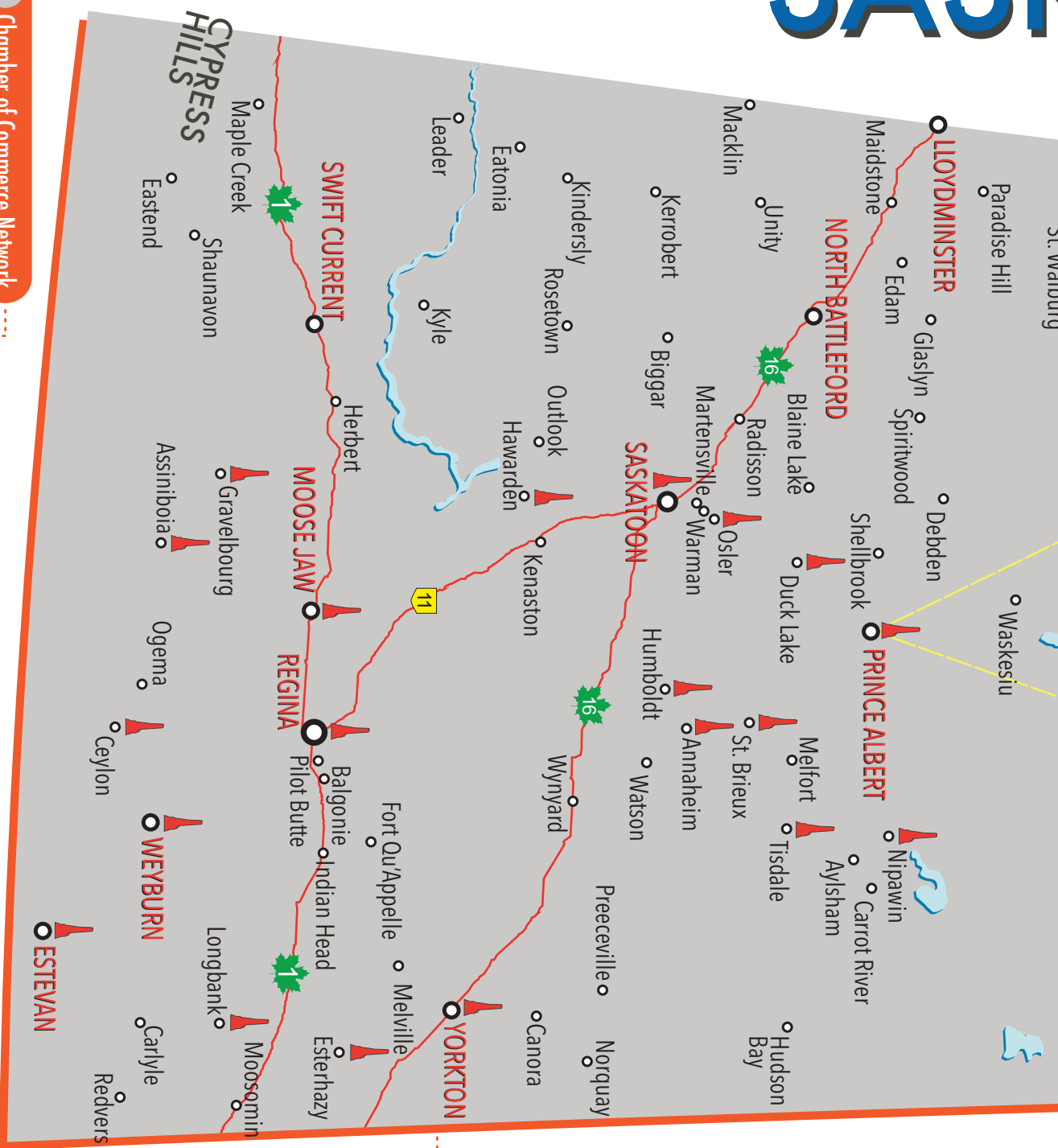


Affinity Credit Union
Community Involvement
Sponsored by Cogent Chartered Professional Accountants LLP



Canadian Organic Herb & Spice Co
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SASK

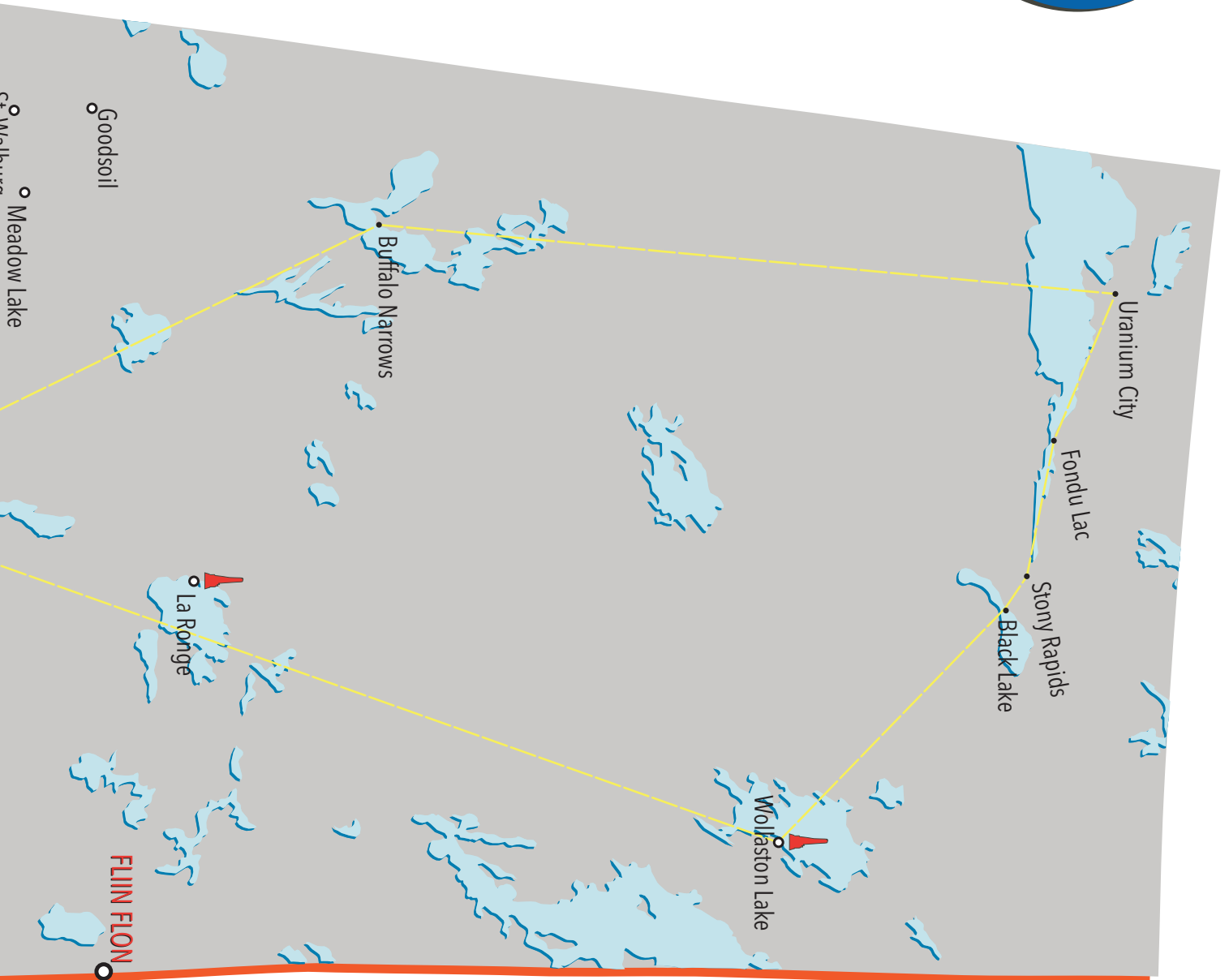


Chamber of Commerce Network

ABEX Winners since 2000

Northern Business Task Force

KATCHEWAN





**Since the EVRAZ N.A.
Regina steel mill's
inception in 1960, the
facility has melted over 40
million tonnes, or 40
Mega-tonnes (Mt) of scrap
– imagine a pile 10 metres
high, 1 Kilometre wide and
about 5 Kilometres long.**



The SCC Continues to Advocate for Resource Development Projects



The spirited public debate around energy development projects in Canada reached a crescendo pitch in the second half of 2018. The SCC, along with other business and industry associations across Canada, continue to be vocal in supporting a number of high-profile pipeline projects, notably Kinder Morgan's Trans Mountain Expansion Project, Enbridge's Line 3 Replacement Program, and Energy East. The common thread plaguing the approval process for all three projects is a problematic regulatory process that does not instill confidence for investors – both at home and abroad. Saskatchewan's continued prosperity hinges on our producers' ability to get their resources to market in a timely and predictable manner.

The SCC, through its Environment Committee, continued its research and advocacy efforts that began in 2017 when the federal government announced it was

conducting a panel review of the *Canadian Environmental Assessment Act*. In April 2018 the SCC provided comment to the House of Commons Standing Committee on the Environment, then reviewing the draft legislation known as Bill C-69. Bill C-69 seeks to overhaul Canada's regulatory process for major development projects by replacing the existing Canadian Environmental Assessment Agency with a broader scope Impact Assessment Agency of Canada. In addition, Bill C-69 seeks to replace the lifecycle regulator National Energy Board with the newly-proposed Canadian Energy Regulator. The SCC's response letter identified major deficiencies with the Bill as it was written at the time. The SCC letter made a number of counter-recommendations to remedy the Bill's many shortcomings.

In May 2018, the SCC in partnership with the Canadian Chamber of Commerce, select local chambers, steel pipe manufacturer EVRAZ North America, and others attended a *Day on the Hill* in Ottawa to bring greater awareness around the importance of Kinder Morgan's Trans Mountain Pipeline Expansion Project. It was in Ottawa where members of the Chamber Network met with government officials to advocate for getting this pipeline built. The

SCC also complimented its *Day on the Hill* advocacy work by circulating a fact sheet on the Trans Mountain pipeline project to members.

Fast forward to September 2018; the SCC published *The Trans Mountain Pipeline Expansion Project* backgrounder that provided an overview of the project and an analysis of then-recent developments, including the Government of Canada's acquisition of the pipeline assets from Kinder Morgan and the Federal Court of Appeals Decision to overturn Cabinet-level approval of the project. In January 2019, the SCC provided additional comment on Bill C-69 to the Senate Standing Committee on Energy, the Environment, and Natural Resources. The recent letter acknowledged positive amendments made to the draft legislation, but made it clear the Bill in its current form is not an improvement on CEAA 2012.

Discussion with the Federal Government around Bill C-69 and other major energy development projects are still ongoing, so stay tuned!

pipelines

Provincial and National Activities



The Saskatchewan Chamber has made a point of regularly connecting with provincial government as well as regularly visiting Ottawa to deliver our member's positions on key national issues. This past year there have certainly been challenges with various federal policies on issues of great importance to Saskatchewan businesses.

In May 2018, Board Chair Clayton Veresh and CEO Steve McLellan went to Parliament Hill to speak to Government Ministers, Opposition Party members and also officials within key Departments. The focus of the trip was to push for the completion of the Trans Mountain Pipeline. Steve McLellan and Clayton Veresh hosted a dinner with Hon. Ralph Goodale, other provincial chamber colleagues, Conrad Winkler, President /CEO of EVRAZ NA and Bob Schutzman, Director of Environmental Affairs - Canada at EVRAZ NA. During this dinner, Minister Goodale indicated that the federal government was looking at "creative options" and indeed it turned out they bought the pipeline and the expansion project from Kinder Morgan. During the days in Ottawa Steve and Clayton were part of several meetings all where they voiced support for the pipeline and desire to go to a regulatory environment where projects like this could be built with greater certainty. Productive meetings with the Saskatchewan

Conservative caucus of MPs and Senators were also had.

In October 2018, the Saskatchewan Chamber visited Ottawa again as part of the Canadian Chambers *Day on the Hill*. The SCC attended sessions with Ministers including Finance Minister Morneau and other key Department Ministers, and also attended sessions focused on Indigenous Engagement, Transportation, and Infrastructure. Hon. Andrew Sheer also presented to the larger group. The SCC will travel to Ottawa again in 2019 to present select issues and as part of the Canadian Chamber *Day on the Hill* project.

While we send many letters and hold meetings in Saskatchewan with our federal leadership, it adds value to our membership to go to the Hill and drive home the issues facing our members face-to-face.

In 2018, Premier Scott Moe met with SCC Chair Clayton Veresh and SCC Immediate Past-Chair Patricia Warsaba to discuss issues of concern to Saskatchewan's business community. As always, valuable conversations were had.



Top: Canadian Chamber President Perrin Beatty with Andrew Scheer and SCC Chair Clayton Veresh

Bottom: Clayton Veresh, Premier Scott Moe, and Patricia Warsaba

Renewables and Green Energy



The latter half of 2018 saw the SCC take a deep dive into research efforts around the exciting and ever-evolving world of renewables and green energy. The catalyst for the SCC's research efforts surrounding opportunities in green energy came as a result of member feedback from a carbon pricing survey back in November 2016. In the survey, SCC members articulated in no uncertain terms that they wanted to see Saskatchewan reduce its greenhouse gas emissions as a goal, but they did not accept carbon pricing as a means of achieving that goal. When members were later asked on what Saskatchewan's plan should be to reduce emissions should carbon pricing be deemed unacceptable, many respondents suggested investment in renewable energy sources and clean technology as a practical alternative approach.

From April to June 2018, the SCC met with several industry stakeholders operating in the province's clean energy sector (wind power, solar power, energy efficiency and conservation, etc.) to gain a better understanding of the current state of the industry. The insights gathered from these stakeholder consultations were eventually documented in a comprehensive internal report, *Issue in Focus: The Renewable*

Energy Sector in Saskatchewan. The report offered a 360 degree overview of the renewable energy sector in the province, with a specific focus on SaskPower's own renewable procurement strategy target of 50% renewable generating capacity by the year 2030.

In addition to providing an overview of the industry, the report also identified some of the barriers currently holding the industry back from realizing its full potential, as well as the business opportunities that are present. The creation of this report is an acknowledgement of the fact that the SCC has an important role in shaping the public policy dialogue around renewable energy and aims to position the province's business community as a leader in the transition to a low-carbon economy. The findings contained in the report assisted the SCC in its subsequent advocacy efforts with government stakeholders and will be incorporated in future public policy recommendations.

Moving into 2019, the SCC will build upon these efforts by hosting an energy series. Join the SCC throughout 2019 for these thought-provoking events.

renewables



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Muskeg Lake Cree Nation
Treaty 6, Saskatchewan



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The Straight Dope: Legalization of Recreational Cannabis and the Workplace



Starting in January 2018, the SCC was actively engaged in the public discussion around legal cannabis. Bill C-45, *The Cannabis Act* received Royal Assent on June 1, 2018 and after some delay, the Act came into full force and effect on October 17, 2018. Recreational cannabis is now legal nationwide. While cannabis legalization is expected to create exciting new business opportunities for the private sector, some employers are worried that it would bring a new set of workplace challenges.

The SCC's research and advocacy efforts centered on two important aspects related to cannabis. The first aspect concerned questions around the wholesale-retail market structure. The second was employer concerns around workplace

health and safety, particularly by those operating in safety-sensitive environments.

Not all SCC members believed legalization was the right course of action. However, the SCC viewed legalization as inevitable and as such, wanted to ensure that sound public policies were recommended and put into place. The SCC's research and advocacy work around cannabis legalization included the following actions:

- Submitting a joint letter with industry stakeholders to Minister Ralph Goodale recommending the Federal Government implement necessary adjustments to workplace safety legislation and regulations prior to legalization.

- Publishing a media release in January 2018 endorsing the Government of Saskatchewan's direction on recreational cannabis sales - a private wholesale and retail distribution model with robust regulatory oversight provided by the SLGA.

- Releasing a Backgrounder, *Legalization of Cannabis*, along with a helpful document, *Legal Cannabis and the Workplace: What Saskatchewan Employers Should Know* that outlined the rights and responsibilities of employers.

- Organizing a series of information sessions across the province in partnership with WorkSafe Saskatchewan, Miller Thomson LLP, MNP LLP, and select local Chambers aimed at employers from March – April 2018.

- Participating in stakeholder consultations around the issue of impairment in the workplace led by the Ministry of Labour Relations and Workplace Safety (LRWS) in September 2018.

Post-legalization, the SCC will continue to monitor the situation as it unfolds and will be prepared to make additional policy recommendations based on member feedback as required.

Legalization



Are you paying someone who's not on your payroll?

Did you know that you are required to report anyone you pay to perform labour, or have contracted to provide service for you in Saskatchewan.

All hired contractors, whether registered with the WCB or not, must be reported. If the contractor is registered and in good standing, they will be removed from your WCB assessment. Contractors are present in all industries. An invoice is considered to be a contract.

Examples of contractors



Restaurants: Individuals or businesses that clean the range hood, dishwasher, refrigeration systems, install/maintain/repair the fire suppression system, or perform any other repairs or maintenance of the equipment, building or property.



Offices: Individuals or businesses that provide garbage or recyclable removal services, lawn maintenance or snow removal services, plumbing or electrical services, or any other repair or maintenance to the equipment, building or property.



Health care providers or clinics: Therapists and other health care professionals, janitors, lawn maintenance or snow removal services, plumbers, electricians, cleaners/ janitors, etc.

Supply only contracts are not considered contractors - If a contractor only supplies materials and does not provide any installation, this is considered a supply only contract. **Example:** Windows are delivered as part of a purchase, but no installation is done by the supplier.



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Indigenous Engagement: a Saskatchewan Chamber Priority



**Top: Indigenous Engagement Charter
100-day Task Force meeting.**

**Bottom: John Lagimodiere hosted
Aboriginal Awareness Training for the SCC
staff in January 2019.**

Saskatchewan has many positive attributes that make it a great place to live, work and invest; the innovation and energy of its people, its four seasons, and its natural bounty afforded from the land, make Saskatchewan an incredible place. However, the province also has opportunities that must be championed to reach its full potential.

Perhaps most importantly, this includes the opportunity to fully engage the Indigenous Peoples in the economy. In his 2011 report, University of Saskatchewan Professor Eric Howe reported that the value, beyond any social or moral purpose, of bridging the Indigenous education gap and bringing the Saskatchewan Indigenous population to the same economic level as the broader population is a \$90 billion opportunity. There is little doubt that this is the most important economic opportunity on Saskatchewan's horizon. To that end, the Saskatchewan Chamber of Commerce (SCC) has formed a Task Force which will result in an Indigenous Engagement Charter that is specifically designed for Saskatchewan business. The Charter will be developed with expertise and cultural sensitivity and will be enhanced over time. The aim of the Charter is to serve as a roadmap to provide businesses with tools to achieve engagement and assist the

business community in demonstrating the role it can play in working towards reconciliation.

The Task Force is being led by co-chairs Thomas Benjoe, President and CEO, FHQ Developments and Karen Birss, District Vice President, Scotiabank. The Task Force is expected to conclude in April 2019 and the Indigenous Engagement Charter will be launched in 2019.

To find out more or to get involved, contact Elissa LaLiberte: elaliberte@saskchamber.com

engagement



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Environment Committee



The Chamber's Environment Committee is a long-standing part of the organization, originating from the early 1990s. It is comprised of members that have a strong interest in Environmental matters, and is supported with Chamber staff, meeting monthly except in December and during the summer. It also has an ex officio member from the Saskatchewan Ministry of Environment. The Committee has frequent presentations from various environmental regulators.

This dedicated group has been stalwart in the pursuit of environmental issues affecting business in Saskatchewan. Over the years, they have been at the forefront in such areas as an appropriate environmental management model and the development of the Saskatchewan Environmental Code, water-related

issues and the development of a Water Advisory Council, and the climate change file. The climate change file includes federal & provincial legislation, Environmental and Canada Revenue Agency Registrations, verification & ISO 14064 standards, Clean Fuel Standards, ongoing carbon tax levels, pass-through carbon tax costs, court cases, and electricity and natural gas sector controls.

In 2018 – 2019, the Committee has focused on the carbon tax and the environmental assessment issues with the related federal Bill C-69, while continuing to support the effort on the Water Advisory Council. Members with wider experience shared their national advocacy information on these efforts. Support also continued for the Energy Efficiency Task Force

Report. Multiple presentations were received, letters sent, and meetings attended on these subjects over the year, including meetings with the Saskatchewan Minister of Environment, and the Deputy Minister for Environment and Climate Change Canada.

For decades, the SCC Environment Committee has been Chaired by Bob Schutzman, Director of Environmental Affairs at EVRAZ N.A. The SCC greatly appreciates his time and expertise.

environment

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Water Council for Saskatchewan Committee Members

Water Council for Saskatchewan

Throughout 2018, the Water Council for Saskatchewan (WCS) continued its research and advocacy work around improving the governance and management of our water resources. Business and communities have a significant reliance on water for use in a variety of day-to-day activities, most notably for drinking, health, and hygiene, agriculture, manufacturing, mining, and recreational enjoyment. In order for the province to remain competitive, businesses and communities require access to reliable, sustainable, and quantifiable supplies of water with appropriate quality.

Currently water governance and management in Saskatchewan is fragmented, with considerable duplication and overlap amongst various public agencies operating at all levels of government. The WCS was established in 2017 in response to the Saskatchewan Water Security Agency's (SWSA) decision to abandon the creation of a water advisory council and instead opt for bi-annual or annual, one-on-one consultations with stakeholders. The WCS believes that there is still great merit in having a dedicated water advisory council.

The goal of the WCS is a water governance and management

structure that is integrated, multi-disciplinary, strategic, and collaborative. To achieve this end, the SCC established the stand-alone Water Council of Saskatchewan as a single-table advisory body comprised of diverse stakeholder representation from private businesses, water stewardship and conservation agencies, academia, as well as municipal associations. The goal of the WCS is to encourage and support, but not duplicate, SWSA's *25 Year Water Security Plan*.

Some notable accomplishments of the WCS to date include:

- Creating the document, *An Overview and Mandate of the Water Council for Saskatchewan* that provides an outline of the organization's key objectives.
- Convening a WCS stakeholder meeting in March 2018 that outlined the current state of water management, facilitated roundtable discussions, and identified key priorities.
- Establishing a Steering Committee comprised of members of the larger WCS membership to offer greater direction and allow for more immediate and focused action.

- Partnering with ISM Canada on a *Water Data Hub* concept that seeks to create a single easily-accessible repository for water data coupled with advanced analytics.
- Meeting with Dustin Duncan, the Saskatchewan Minister of Environment, and Ralph Goodale, the Federal Minister of Public Safety and Emergency Preparedness throughout 2018.

Next steps for the WCS in 2019 include seeking out federal and provincial funding to carry out flood plain mapping across the province using LiDAR technology and engaging with established water councils in other provinces.



water council

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The Gig Economy Comes to Saskatchewan: Regulating Ride Sharing and Transportation Network Companies



Beginning in spring 2018, the SCC participated in stakeholder consultations with the Government of Saskatchewan to help shape the regulatory environment that would govern new and disruptive services like ridesharing transportation network companies (TNCs) such as Uber and Lyft. In November 2017, Joe Hargrave, the Minister responsible for SGI, introduced The *Vehicles-for-Hire Act* in the legislature. The purpose of the Bill was to overhaul the existing framework governing the

vehicle-for-hire industry, in light of new technologies and new entrants into the marketplace. An amended version of the Bill was given Royal Assent on May 30, 2018 and came into full force and effect on December 14, 2018.

The SCC saw this policy window as an opportunity to re-think how we regulate innovative new processes and utilize existing transportation assets more effectively. A guiding principle during the SCC's policy formulation process was ensuring a competitive and open marketplace that sought to foster business growth, all the while offering consumers greater choice. Given SCC membership consists of firms representing different forms of vehicle-for-hire, it was important that any new regulatory framework strive to create an even and fair playing field, while also recognizing the differences in competing business models.

The SCC consulted extensively with members operating in the vehicle-for-hire space, as well as with external stakeholders like the Government of Saskatchewan. In a letter to David Marit, the Minister of Highways and Infrastructure in April 2018, the SCC outlined its policy recommendations. Some key SCC policy recommendations included:

- A framework that creates an even playing field for all competitors; the government should remain neutral, set sensible safety standards, and refrain from picking winners and losers
- New regulations should focus on both passenger and driver safety (i.e. annual vehicle inspections, criminal background checks for drivers, minimum liability insurance, etc.)
- Eliminating artificial barriers to exit and entry in the market; gradually phasing out entry and price controls; allow ride fares to be more responsive to changes in supply and demand
- A marginal cost-based, fee-per-trip cost recovery regulatory model for municipalities so as not to discourage part-time, casual drivers
- Recognizing digital dispatch infrastructure and embracing new, innovative technologies like real-time driver/passenger feedback

A number of the policy recommendations made by the SCC have found their way into the finalized version of the Bill. Moving into 2019, the SCC will refocus its advocacy efforts on those municipalities currently developing supplementary by-laws.

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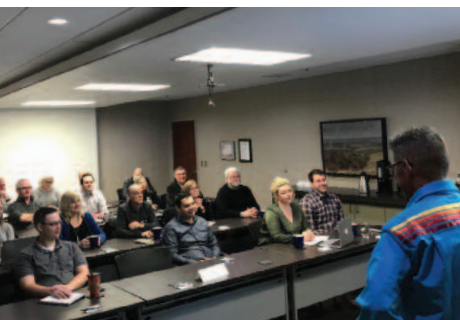


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Programs and Training



**Indigenous Awareness Training
for the SCC staff**

The Saskatchewan Chamber of Commerce is pleased to offer several new programs and training opportunities to its members. Commencing in 2019, the SCC will regularly offer Indigenous Awareness Training as well as the Make It Our Business program, in partnership with the Provincial Association of Transitional Houses and Services Saskatchewan (PATHS) to both members and the public.

In December 2018, the SCC staff and Board participated in the Make It Our Business program presented by the Provincial Association for Transition Houses and Services (PATHS). The Make It our Business program provides information to engage employers and other workplace stakeholders to prevent workplace domestic violence, support employees at risk of or currently experiencing domestic violence, and to improve workplace health and safety. This program outlines how employers, supervisors, managers, human resources professionals, security personnel, union representatives, and co-workers can recognize abusive relationships, respond appropriately to interpersonal violence, and refer victims and abusers to support services.

The SCC staff and Board also participated in Indigenous Awareness Training presented by ACS Aboriginal Consulting in

January 2019. As part of the SCC's current Strategic Plan, and in line with the Truth Reconciliation Commissions (TRC) Call to Action 92, an Indigenous Engagement Plan is a major focus of the Chamber's efforts, including Indigenous Awareness training for staff and Board Directors. This training focused on the areas of the Indigenous culture and history in Saskatchewan, hiring practices, procurement policies, actions to take, and developing and nurturing partnerships.

Please check our website for upcoming dates for these two very important programs – and watch for more programs coming your way soon!

training

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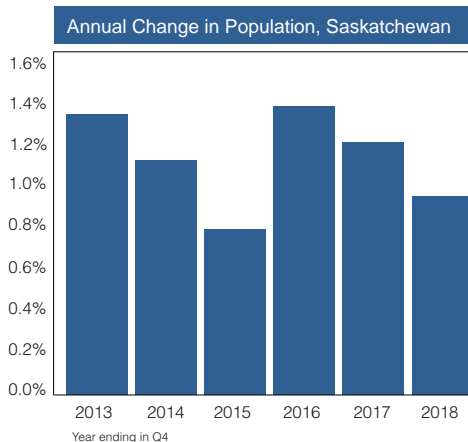
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Environmental Scan: Ten Demographic and Economic Indicators

The Saskatchewan economy showed a varied assortment of results in 2018. On a positive note, population and employment grew and the provincial economy expanded for a second consecutive year. Less positively, retail and mineral sales posted declines. In this summary, ten demographic and economic indicators are used to describe 2018 in Saskatchewan.

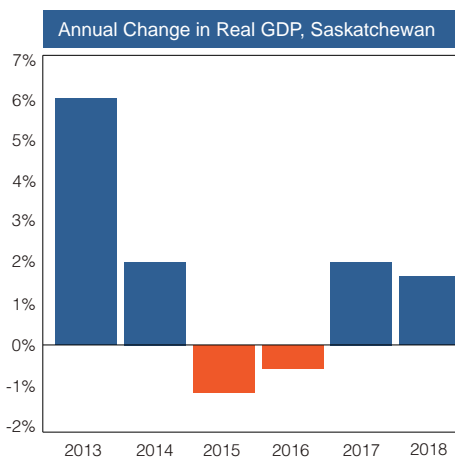
Demographic Trends

The Saskatchewan population is growing at a healthy pace. In the fourth quarter of 2018, the population grew at an annual rate of 0.9% largely driven by International immigration.



Economic Trends

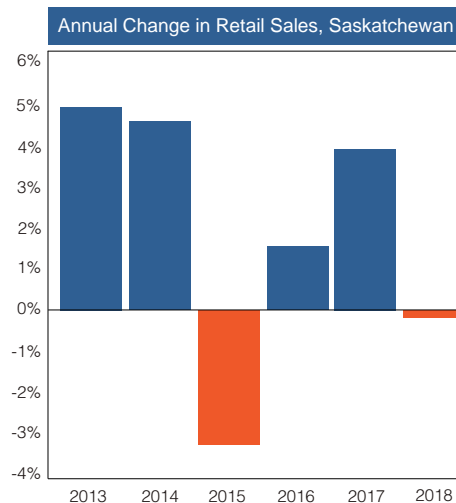
Economists typically use the gross domestic product after adjusting for inflation (real GDP) to measure the size of an economy. By that measure, Saskatchewan went through recession in 2015 and 2016. Growth in 2017 and 2018 is estimated at 2.2% and 1.7%, respectively.

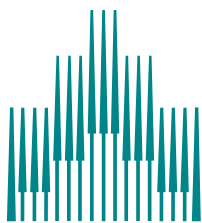


Four Economic Engines

One way to analyze the state of the economy is to look at the four engines that make up GDP. The four engines are consumers, investment, governments, and out-of-province buyers of the province's goods and services.

- Consumer spending in 2016 and 2017 recovered from the slowdown in 2015. Retail sales, one of the best indicators of consumer spending, grew by 1.5% in 2016 and 4.1% in 2017 but slowed in 2018 with a sharp drop in vehicle sales.
- Investment, the second engine, declined for three consecutive years in 2015 to 2017 from the peak in 2014. The most recent survey of businesses suggests that capital investment will grow by 0.5% in 2018.
- Government spending slowed in 2018 as the provincial government, the largest spender of the three levels of government, curtailed spending as a result of lower resource revenues.
- Complete data on international and interprovincial trade including services, the fourth engine, are not available at the time of publication but the value of international merchandise trade can be used as a proxy. The value of international merchandise exports (net of imports) fell for three consecutive years because of a decline in commodity prices. 2018 saw a modest resurgence in energy and mining exports.





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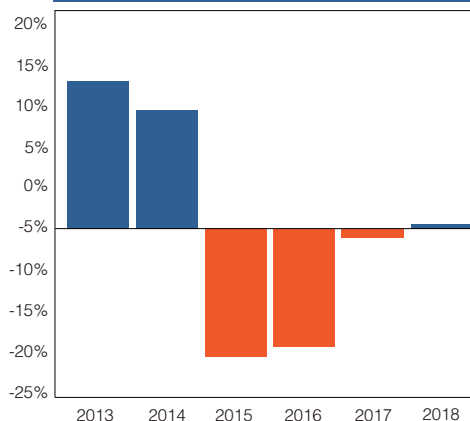
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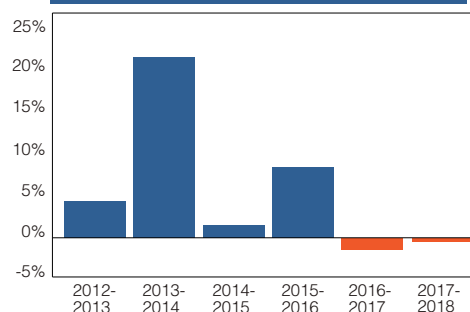
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Environmental Scan: Ten Demographic and Economic Indicators continued

Annual Change in Capital Investment,
Saskatchewan



Annual Change in Provincial Government
Spending (general revenue fund),
Saskatchewan



Employment

The total number of people employed is a useful and timely summary measure that reflects economic activity across all sectors. Employment declined by 0.9% in 2016 and 0.2% in 2017. 2018 saw renewed employment growth of 0.4%

Household Income

After dropping in 2016 with slowing employment income, household disposable income advanced in the 3 to 4 percent range in 2017 and 2018.

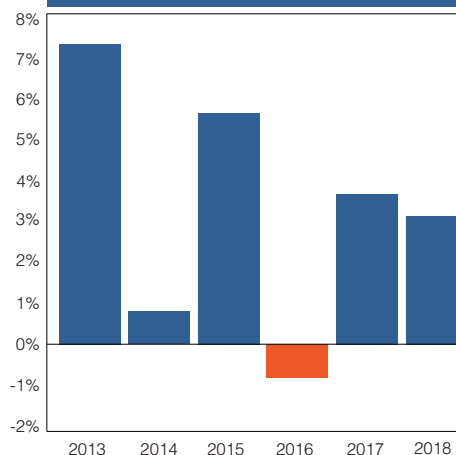
Net Farm Income

Agriculture is one of the most important sectors in the economy and net farm income is a useful summary measure of the health of the sector. After declining in 2016, net farm income bounced back with double-digit rates of growth in 2017 and 2018.

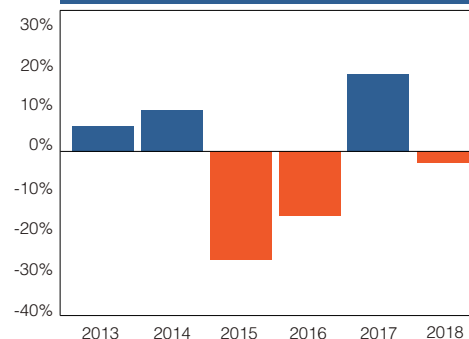
Value of Mineral Sales

The resource sector is another important sector in the provincial economy. The value of mineral sales fell sharply in 2015 and 2016 from the peak of \$23 billion in 2014. Preliminary data suggests sales in 2018 will be near the 2017 level.

Annual Change in Household Disposable
Income, Saskatchewan



Annual Change in Value of Mineral Sales,
Saskatchewan



Source: Saskatchewan Bureau of Statistics, Statistics Canada, Saskatchewan Finance, Royal Bank of Canada, Praxis Consulting Trendline, SJ Research Services.

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The SFLN will be the champion for Financial Literacy across Saskatchewan, in an attempt to increase financial responsibility to build economic strength and independence in our province.

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