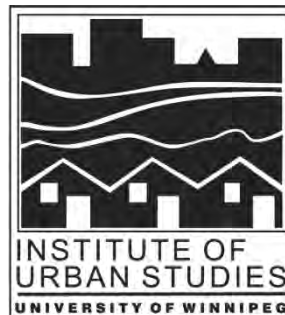


The Winnipeg Workplace: A Review of Existing Information and Literature

1995

The Institute of Urban Studies





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WINNIPEG

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THE WINNIPEG WORKPLACE: A REVIEW OF EXISTING INFORMATION AND LITERATURE

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THE WINNIPEG WORKPLACE
A REVIEW OF EXISTING INFORMATION AND LITERATURE

Submitted to
WINNIPEG 2000

by
The Institute of Urban Studies

December 1995

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EXECUTIVE SUMMARY

The objective of this report is to review the existing literature and data on the Winnipeg workplace, to report on the current knowledge base, and to identify the existing gaps in the literature.

There is considerable information on the broad trends affecting the workplace in Winnipeg, and a reasonably comprehensive understanding of the traditional sectors of the workplace and economy. There is also general information that compares Winnipeg with other cities in the West and the rest of Canada. The literature also includes a wealth of sector specific workplace studies that contain basic characterization data. However, there are significant weaknesses and gaps in our knowledge of the workplace that include, but are not limited to, the following:

- good information on leading-edge sectors;
- information on employer characteristics;
- information on the adaptability of the workplace;
- documentation of the special skills of the workplace;
- workplace attitudes, morale, ability to work as a team, initiative, *etc.*;
- labour-management relations;
- the interdependence of the various sectors of the workplace and the economy;
- benchmarking and comparative studies; and,
- a host of other aspects that deal with competitiveness, skills and change in the workplace.

RECOMMENDATIONS

It is obvious from the review of the literature and the data sources that before any effective workplace planning can be undertaken a great deal more information is required. Our current understanding and knowledge base on the workplace is not comprehensive enough to guarantee the appropriateness of any strategic interventions or initiatives that might be undertaken.

A comprehensive study of the Winnipeg workplace could be undertaken. However, such a study would require a tremendous amount of time, effort and resources. At this point it might be better to develop a work plan identifying some of the more important pieces of work that would allow Winnipeg 2000 to introduce initiatives to develop a more innovative and competitive workplace.

Research initiatives that would assist in this fashion include:

- ***To identify and characterize firms in growth sectors and determine their workplace and infrastructure needs.***
- ***To construct a database that reflects the changing nature of the workplace.***
This database must more adequately reflect the changing nature of the economy and the new characteristics of the workplace that are important in this economy rather than the traditional indicators currently in use. Current data sources do not capture indicators important for today's economic environment.
- ***To identify the strengths and weaknesses of the Winnipeg economy and the Winnipeg workplace. Benchmarking work is required.*** This is important to monitor change, but it is also needed to provide us with a comparison of how the Winnipeg workplace and the economy are doing relative to other cities. This work is necessary to determine our competitiveness; the advantages we have; and the weaknesses we have to address to become more competitive.
- ***An assessment of employee skills, levels of training and education and the transferability of their skills.*** This would be difficult, expensive and time consuming to undertake for the entire workplace. It would be best to select specific industries and use them as case study examples. Case study work could focus on both growth industries (the new economy) as well as the more traditional sectors. It would be important in these case studies to collect and

highlight information required within the context of the changing economy, changing technology and the different ways of doing business.

- ***To undertake a study of employee movement from one industrial sector to another.*** This would build on the work above by identifying more clearly the transferability of skills, the cross sectoral linkages and the potential to attract new industries by building on the strengths of the existing workforce.

- ***To undertake case studies of management practices and labour-management relations.*** It would be particularly important to focus on success stories where labour and management are working effectively as a team to create a more competitive and dynamic operation. The focus of this work should be on documenting and highlighting management practices and successful frameworks for labour/management team work. The work should also examine the transferability of these success stories to other industries in the workplace.

- ***A useful piece of work related to the above would be an analysis of the Winnipeg workplace work ethic and the productivity of the workplace.*** The focus in this case should be on developing new indicators to measure the work ethic, developing benchmark material and then conducting comparative studies with other appropriate centres.

- ***An analysis of the entrepreneurial (management) sector of the workplace.*** Although our data sources and understanding of the workforce is limited, the literature suggests we know even less about the management and owners of business in Winnipeg. Without a more complete knowledge of the strengths and weaknesses of this side of the workplace it is difficult to plan effective initiatives to make the workplace more innovative and competitive.

- ***Within the Winnipeg context it is also important to document in more detail the position of the Aboriginal population in the workplace.*** Their current involvement in the workplace, their skills, their entrepreneurial initiatives, and areas that should be the focus of further education and training have to be much better documented. This is an extensive piece of work but it is certainly required in any effort to more effectively integrate the Aboriginal population into the workplace.

- ***An analysis of highly qualified personnel (HQP) leaving the province.*** Are our highly skilled graduates and workers leaving the province? If so, why and where are they going? What sectors have to be promoted to keep them employed in the province?

- ***Work that recommends policy changes and initiatives concerning the workplace environment that will allow it to operate more effectively and improve competitiveness.*** This aspect is one of the last components of any work plan as it depends on information collected in previous components of the work.

These eleven recommendations certainly do not include all the areas of work that the review of literature and data suggest are required. Work in the above areas, however, would place Winnipeg 2000 in a better position to introduce effective workplace initiatives.

1.0 REPORT OBJECTIVES

The objectives of the study include:

1. To review the existing literature and data sources on the Winnipeg workplace;
2. To highlight what we know and don't know about the workplace, including the workplace environment; and,
3. On the basis of the state of the current knowledge, make general recommendations regarding future work that will place Winnipeg 2000 in a position to suggest strategic initiatives to position the workplace to take advantage of future growth and investment opportunities.

The objectives do not require a detailed profile and characterization of the workplace. Instead they call for an overview of our knowledge of the workplace, and documentation of gaps that have to be addressed to build a better understanding of the workplace environment.

For the purposes of this report, the workplace will be defined as "the employers, employees, and the environment in which they interact," as well as the culture and attitude of the workplace environment.

2.0 WINNIPEG AND THE GLOBAL ECONOMY

Globalization of world markets has created new opportunities for firms by increasing access to expanding world markets. As production has become more fragmented, multinational enterprises have rationalized production around the world. Over the past twenty years, this has led to a larger share of world output being traded rather than produced for domestic markets. In Manitoba for example, approximately 30% of exports as a percentage of GDP are traded to other countries and 27% to other provinces. The proportion of exports traded to other countries doubled between 1981 and 1991 (Figures 1 and 2). The traded goods and services sector is now the major employer in the province generating 39% of all employment.

The globalization of world markets has increased the pressure on businesses to locate in least-cost markets, expanded the flow of capital across countries, and consequently generated rapid growth in foreign direct investment. Winnipeg and Manitoba face the challenge of positioning themselves to capitalize on existing investment opportunities by creating a centre for new investments in an increasingly competitive world market.

3.0 WINNIPEG AND THE CHANGING ECONOMY

Over the past ten years, the most rapidly growing sectors in industrialized economies have been the service sectors. Employment creation in Winnipeg has been consistent with that of the rest of the industrialized world. The majority of new jobs created in Winnipeg over this time period have been in the service sectors (Figure 3), although manufacturing and resources remain important. The new emerging service industries tend to be knowledge based, requiring highly skilled labour.

Today's economy is often split into three sectors: the *new economy*, the *old economy*, and *turnaround industries*. The *new economy* consists of the emerging service sectors that are knowledge intensive, and technology- and information-driven, with an increasing share of output being traded. Sectors within this new economy, which incorporate computer technology and information as important ingredients, include: finance, public administration, research and marketing industries, business services, software and computer services, industrial chemicals, etc. Competitive advantage in a knowledge-based economy is much more dependent on ideas, skills, research, development and innovation rather than traditional input costs.

Similarly, *turnaround industries* are characterized by the furniture and garment industries and some transportation activities. These industries have incorporated new technologies, are producing new goods, and finding new markets either domestically or abroad.

Finally the *old, or traditional, economy* continues using traditional production techniques. The old economy includes primary industries, manufacturing, construction and some transportation activities.

The needs of industries in the new or turnaround economy moreover, differ from those in the old economy. A survey of Manitoba industries indicated that a stable and well-trained workforce are more important than the costs of doing business in determining the decisions of firms in the new economy to remain in Manitoba. Conversely, input costs remain the primary concern for traditional sectors.

Identifying the future direction of the Winnipeg economy is therefore critical to determining the nature of the workplace and its needs. Forecasting future trends is,

however, an inexact science. To prepare for an uncertain future, detailed and accurate information about the workplace environment is required. Understanding the nature of the workplace, in light of the changing structure of the local and world economy, will shed light on how well placed Winnipeg is to take advantage of future growth opportunities and identify those sectors in which Winnipeg has a competitive advantage.

Future growth trends in Manitoba point to higher growth in the emerging sectors. The literature and information suggest, however, that although the workplace in Winnipeg is shifting towards the new economy, as indicated by the growth of certain industries and the greater emphasis on trade, much of the labour force is still employed in traditional industries. The Provincial Government has identified six emerging sectors: Health Care Products; Aerospace; Information Technology and Communications; Environmental Industries; Tourism; and Agri-Food Processing, that they believe are well placed to take advantage of future growth opportunities in Manitoba. These industries, together with Manitoba's traditional competitive advantage industries—Agriculture, Hydroelectric Power, Mining and Metal, Forest Products, Transportation and Distribution, and Farm Machinery and Supplies—will most likely form the core of the economy in the coming years. In addition there are a number of important turnaround industries in Winnipeg, including the furniture and garment industries, that have shown positive growth and increased trade.

4.0 BROAD TRENDS AFFECTING THE WORKPLACE

The literature and information suggest there are a number of broad trends affecting the workplace. These include:

1. ***The tendency of industries to move toward greater agglomeration and clustering.*** This will result in greater competition, and force Winnipeg to compete not just with other cities in Western Canada, but also with cities on a national and international basis. First entry into the market is extremely important to take advantage of economies of agglomeration. Cities with a head start in a certain sector will be better placed to take advantage of future growth and investment opportunities.

An example of agglomeration on a small scale is the recent growth of knowledge and technology intensive industries in Saskatoon. The focal point of this growth is a knowledge and technology-intensive industrial park associated with and adjoining the University of Saskatchewan. This partnership between university and industry has become a major competitor in the field. A similar activity, although on a smaller scale, has developed in Winnipeg. Academics from The University of Winnipeg are working on a number of initiatives in space provided by the National Research Council (NRC). The Council, in turn, is using the results of the research in work it is undertaking with its private industrial partners.

2. ***The changing nature of technology.*** The workplace is adapting to new technology. This is likely to become even more important in the future and the workplace will have to continue to acquire skills it does not currently have. Particularly important are skills in the computer and information fields. Keeping abreast of changing technology is a reality every competitive workplace environment faces today.
3. ***A shift from a traditional economy based on primary resources and manufacturing (the old economy) to knowledge based, intensive activities (the new economy).*** The workplace will need training for these new activities, and

competitive strength will depend to a significant extent on a knowledge-based, skilled workforce.

4. ***An emergence of new forms of work.*** Competitive advantage will reflect knowledge-based skills, research and development initiatives. Although Winnipeg and Manitoba are moving in this direction, there is concern that Winnipeg may not be adapting as fast as other areas, and, as a result, is not taking advantage of available agglomeration economies. The literature strongly suggests (although it offers no concrete proof in terms of numbers) that we are losing our skilled labour to other areas, as opposed to creating new economy industries that will keep them employed at home. The migration of Highly Qualified Personnel (HQP) out of the province has been a concern for some time. It appears that Manitoba, and Winnipeg in particular, are training people who get jobs elsewhere. In effect, the province is subsidizing the workforce and industries in other areas.
5. ***The aging of the population.*** This will create a demand for new products and a growing number of elderly consumers. Over the longer term, it will also mean that there will be significant turnover in the workforce, particularly at the management level. An aging workforce may also be less amenable to change which threatens the overall competitive position of the workplace.

These plus other factors will dictate the need for change in the Winnipeg workplace for the next several years. The flexibility and adaptability of the workplace in the face of these trends will be important in maintaining Winnipeg's competitive advantage.

5.0 WINNIPEG AND THE REGION

Compared to other cities in Western Canada, there are some positive aspects about Winnipeg that make it attractive to investors. It appears, however, that Winnipeg is falling behind economically. Consequently, investment is being channelled elsewhere and our highly-educated graduates are leaving for jobs in other areas. Though job creation in Winnipeg has been significant, the literature and data suggest that the jobs created have not provided opportunities for highly skilled individuals in the "new economy."

A comparison with other cities in Western Canada shows that Winnipeg has:

1. ***Slower rates of population growth.*** The Winnipeg Metropolitan population has increased approximately 4% since 1986. Growth rates in Calgary, Edmonton, Vancouver and Victoria have been much higher, ranging from just over 8% in Edmonton, to 16% in Vancouver (Figure 4). Even Regina and Saskatoon have been growing more rapidly than Winnipeg over the period 1971 to 1991.
2. ***An older population.*** Approximately 12% of Winnipeg's population is 65 years of age or older. Only Victoria, a retirement community for seniors, has an older population profile (Figure 5).
3. ***A population with a lower level of education.*** Approximately 11% of the Winnipeg population 15 years of age or older has less than a grade nine education. This is the highest level of any Western City. This figure falls to just over 9% in Regina and Saskatoon and to less than 6% in Calgary and Victoria (Figure 6). Winnipeg also has one of the lowest percentages of the population with a University Degree.
4. ***Lower median incomes.*** The median household income in Winnipeg is just over \$35,000. This compares with almost \$45,000 in Calgary and over \$40,000 in Edmonton and Vancouver. Only Saskatoon has a lower median household income than Winnipeg (Figure 7).
5. ***A higher percentage of people below the poverty line.*** In Winnipeg, 20% of households fall below Statistics Canada's poverty line. The proportion of

households below the poverty line in Vancouver and Calgary is approximately 17% (Figure 8).

6. ***Lower rates of labour force growth than some other Western Canadian cities;*** During the 1987 to 1994 period, the percentage increase in the labour force in Winnipeg was 4.5%, compared to just under 4% in Regina and Saskatoon, 9% in Edmonton, 11% in Calgary, over 17% in Victoria, and close to 20% in Vancouver (Figure 9). During this period the labour force increased by approximately 16,000 in Winnipeg. The growth in the labour force in Vancouver during the same period was over 150,000.

Employment in Winnipeg, after reaching 336,400 in 1990 fell to 321,000 in 1992, but since then has climbed again to over 330,000. Winnipeg is definitely driving the economy in Manitoba, as most of the growth that exists within the province is occurring in Winnipeg (Table 1).

7. ***Unemployment.*** The number of unemployed people in Winnipeg increased from approximately 29,000 in 1989 to just over 40,000 at the end of 1994. Winnipeg's unemployment rate in 1994 was the highest of the seven Western cities, with Regina the lowest at just over 7% (Table 1). As the literature points out, however, this does not mean that more jobs are being created in Regina. It could be a function of more people leaving Regina to seek employment elsewhere. The 19% unemployment rate for the age groups 15-24 is particularly high in Winnipeg at the end of 1994. Edmonton has the next highest rate at just over 15% (Figure 10).
8. ***A lower wage scale.*** Wage rates are lower in Manitoba for many industrial sectors than they are in other provinces. They are also generally lower than the Canadian average. Other things being equal, this may provide the province and the City with a competitive edge (Figure 11).
9. ***One of the most affordable housing supplies in Canada and in North America.*** The average value of the stock in 1991 was just under \$100,000, compared to just over \$80,000 in Regina and Saskatoon and over \$240,000 in Vancouver (Figure 12).

WORKFORCE DATA - WINNIPEG CMA 1989-1994									
Year	Labour Force	Employment	Full-time	Part-time	Unemployment	Not in Labour Force	Part-time Rate	Unemployment Rate	Employment/Pop. Rate
1989	364.3	335.5	279.6	55.9	28.8	164.4	68.9	7.9	63.5
1990	365.3	336.4	277.1	59.3	28.9	167.1	68.6	7.9	63.2
1991	364.3	327.7	265.0	62.6	36.6	172.5	67.9	10.1	61.0
1992	362.0	321.0	257.9	63.1	41.0	179.4	66.9	11.3	59.3
1993	368.7	328.6	265.7	63.0	40.1	178.2	67.4	10.9	60.1
1994	370.6	330.3	269.5	60.7	40.4	181.4	67.1	10.9	59.8

Source: Statistics Canada - Labour Force Annual Averages

The information comparing Winnipeg with other cities in Western Canada provides both a positive and negative picture. However, these indicators do not necessarily reflect what is important in today's economy. This reflects one of the difficulties with existing data sets. New indicators may have to be identified and collected.

In addition, it has to be acknowledged that Winnipeg contains one of the highest proportions of Aboriginal people of any city in North America. Lower levels of education, higher levels of poverty and unemployment and lower workforce participation levels characteristic of the Aboriginal population certainly impact overall averages in Winnipeg. The plight of the Aboriginal population presents both challenges and opportunities for Winnipeg. In the future they will constitute a growing proportion of the population entering the workforce. They represent a future source of strength for the workplace but significant efforts will have to be directed at skills training and development.

6.0 THE WORKPLACE ENVIRONMENT

Few studies have been undertaken to examine workplace values and the general workplace environment in Winnipeg. Although Statistics Canada has some data on the workplace environment, i.e., strike days, productivity and labour shortages, they do not provide any comprehensive database on the workplace environment. Moreover, major studies relating to the workplace environment in Winnipeg are sector-specific, a workplace environment study at the University of Manitoba, and a study commissioned by Manitoba Nurses Union for example. Excluding the Statistics Canada data, the studies are often intended for internal working purposes, but the observations are generally known.

The findings suggest (particularly in work undertaken by G. Nutall of Cultural Research) that there is a significant degree of alienation and discord in the workplace. There are numerous examples of labour and management not working "as a team," and where changes required to meet the challenges of a changing economy have not been achieved by labour and management working as a partnership. On a positive note, the studies do suggest that the Winnipeg/Manitoba workplace environment is better than it is in most other jurisdictions.

Workplace-related studies also focus heavily on the characteristics and attitudes of the labour force and on the relationship between labour and management. Very few studies, however, either characterize or analyse the management/entrepreneurial group. The characteristics, strengths, and weaknesses of the entrepreneurial sector are consequently not widely known or understood. This represents a major problem when trying to take advantage of future opportunities, or when adjustment to change is important. Without a good knowledge and understanding of the entrepreneurial sector, strategic initiatives are difficult to target and implement effectively.

According to the literature and informed opinion in the workplace, the competitive advantage of an area increasingly rests with the ability of its workplace to be innovative, productive and accept change. Location and resources can no longer provide centres with a comparative advantage and competitiveness in the future. The workplace environment in Winnipeg, despite a certain level of discord,

appears to provide us with a strength on which we can build, and any improvements in the workplace environment are certainly an important source for future competitiveness. However, while the available studies are informative, there is little comprehensive analysis of the Winnipeg workplace environment. Many questions relating to the workplace environment, remain unanswered, and clearly more research is needed in this area.

7.0 SECTORAL STUDIES

In contrast to the number of studies on workplace environment, there is an abundance of sectoral studies of different sectors of the Winnipeg economy.¹ While sectoral studies are certainly necessary and useful, they do not fully capture the interdependence of the economy. Sectoral studies cannot provide a comprehensive picture of the economy as a whole, since they do not capture the nature of a general workplace environment across many sectors. For example, sectoral studies provide little information on related needs, in terms of infrastructure, energy, labour skills, *etc.*, of different industries, or whether workplace stability in a sector necessarily implies that other sectors will follow the same pattern.

The vast majority of sectoral studies are prepared by government departments (federal, provincial and municipal). Each study examines a specific sector in the economy (civil engineers, hairdressers, computer programmers, *etc.*) and outlines the state of the sector, highlights specific problems faced by the sector, describes the nature of the workforce, examines the problems faced by a sector in adopting new technologies, and makes recommendations about changes required in the sector or the potential for future employment opportunities in the sector.

The standard information contained in sectoral studies includes occupational analysis such as employment profiles, demographics and skill development, growth, employment and labour skills forecasting, and technological needs for the sector. Sectoral studies also often analyse the opportunities or barriers to economic development in a specific sector of the economy. The Arthur Anderson Report (1994), for example, surveyed a number of major industries, divided into traditional and emerging sectors, in Manitoba. The study reported on the needs and prospects for the different sectors. Recommendations suggested within the sectoral studies are based on the identification of gaps within the sector. These recommendations outline

¹There are over seventy sectoral studies commissioned by various government departments which are not listed in the bibliography.

strategies aimed at solving the technological and labour training needs, and determine resource planning strategies for specific sectors.

8.0 STATISTICS CANADA

A second source of sectoral-specific information is Statistics Canada. Statistics Canada provides the most detailed and comprehensive database available at the industry level for both Manitoba and Winnipeg. These data cover output, employment, exports, imports, capital stock, *etc.* More detailed data on employment and wage rates by occupation, disaggregated by sex, are also published. A reasonably comprehensive demographic report for Winnipeg is also contained in the 1991 Census. Census data are available by age and sex, and provide detailed statistics on population, population mobility, education, labour force activity, employment income, *etc.*

Statistics Canada is also the primary source of information that allows comparison on a regional or national level. There are very few other sources in this area. One exception is the 1994 Geographic reference report prepared by the Economic Research Institute, which compares cost of living indices across major North American cities including Winnipeg. Interestingly, Winnipeg is found to have a comparatively low cost of living.

Although the most detailed information on the labour force is contained in the census that is carried out every five years in Canada, Statistics Canada also provides labour force information on a monthly and annual basis through a series of special labour force surveys. Information provided monthly and annually includes: changes in the labour force, the number of employed people (full and part time), the number of unemployed and unemployment rates (by sex and broad age categories), the number of people not in the labour force, and the participation rate and employment to population ratio. In addition, a more limited data set is available by the type of industry.

9.0 WHAT THE LITERATURE DOES NOT TELL US

Although one can identify broad trends affecting the Winnipeg economy and the future prospects for the economy, the lack of a comprehensive study of the Winnipeg workplace environment leaves a serious gap in our understanding. There are many questions about the workplace environment and its ability to adapt to future changes that, consequently, remain unanswered. For example, is Winnipeg prepared to meet the needs of a changing and more technologically sophisticated global economy? How easily has the workplace adjusted to, and accepted, innovation and change? How does the Winnipeg workplace environment compare to that of other cities? While businesses in the emerging sectors identify a stable workplace as their most important criterion, there is little knowledge of the workplace environment in Winnipeg.

If Winnipeg 2000 wishes to implement strategic initiatives to affect change and position the Winnipeg workplace to take advantage of economic change and opportunities over the next decade, there are a number of aspects about the workplace that have to be better understood and therefore, the focus of future work.

The work to date is weak in a number of areas as outlined below:

1. ***It does not provide good information on leading-edge sectors.*** The focus has been on the traditional sectors that are covered in Statistics Canada. This leaves workplace planners, economists, the business community and government without good information on the very industries of the economy that are most likely to be the focus of growth in the future. This makes it difficult to take action to assist these industries, or provide the necessary infrastructure and support that might give these industries a competitive edge in Winnipeg.
2. ***Information on employer characteristics, strengths, weaknesses, etc. is lacking.*** Again, without a good basic knowledge of the management and entrepreneurial group, it is difficult to plan initiatives or provide support that will strengthen economic growth.

3. ***There is little information on linkages between industries.*** For example, are skills in one industry easily transferable to another industry—software and computer services to communications? This is crucial information for new emerging industries or expanding industries.
4. ***Little information exists on the adaptability of the workplace to change.*** This lack of information on adaptability of the entire workplace extends to both employers and employees. Adaptability is important in strategy-building and improving competitiveness.
5. ***There is little documentation of the specialized skills in the workplace,*** particularly with respect to new knowledge intensive industries. Are the skills of the Winnipeg workforce sufficient to take advantage of the opportunities in growth and emerging sectors? Will employers locating here be able to hire the type of employee they need? Will we lose industrial investment because our workforce does not have the necessary skills?
6. ***Only general information on workplace attitudes, morale, ability to work as a team, initiative, etc.*** is available in the work undertaken to date. As has already been pointed out, however, future competitiveness will likely depend more on the skills, initiative, teamwork and strengths of the workplace than location and input costs.
7. ***The issue of labour/management relations is only sparsely explored.*** This issue has just not received any detailed coverage. What is provided is restricted to a few specific sectors. Again however, it cannot be stressed enough how important this aspect is in determining future competitiveness and innovation strength.
8. ***There is no study that provides a comprehensive picture of the workplace as a whole.*** There is nothing that fully captures the interdependence of the various sectors of the workplace and the economy. It is not clear how changes in one area will positively or negatively affect other areas. There is a need to classify industries by infrastructure requirements, skill requirements, *etc.*, and

to classify the workplace in the same way. No one has tried to put all the pieces together.

9. ***The current information does not allow us to answer in any detail, or with any degree of confidence, a number of very important questions about our workplace.*** These include, but are certainly not limited to, the following:

- Does our workplace have characteristics that provide us with a competitive advantage? If so what are these characteristics?
- What is the capacity of the workplace to be innovative?
- Can we place the Winnipeg Workplace within the context of the new economy? Can we identify and characterize growth or leading-edge sectors of the economy?
- Can we identify our new customers, consumers and competitors?
- What are the new skills that are required, and are they widespread in the workplace?
- How is change monitored? What indicators can be used to identify and monitor change?
- Are our highly skilled graduates leaving the province? If so, why and where are they going?

There is a great deal of anecdotal evidence associated with these questions, but very little in the way of hard facts. Opinions are often based on perceptions that may not be founded in reality.

10. ***There is a lack of benchmarking and comparative studies.*** How do we compare to our competitors, with other cities for example?

Until many of these gaps in our knowledge base are addressed it will be difficult to plan strategic initiatives that will assist the workplace in becoming more innovative and competitive.

10.0 RECOMMENDATIONS

It is obvious from the review of the literature and the data sources that before any effective workplace planning can be undertaken a great deal more information is required. Our current understanding and knowledge base on the workplace is not comprehensive enough to guarantee the appropriateness of any strategic interventions or initiatives that might be undertaken.

A comprehensive study of the Winnipeg workplace could be undertaken. However, such a study would require a tremendous amount of time, effort and resources. At this point it might be better to develop a work plan identifying some of the more important pieces of work that would allow Winnipeg 2000 to introduce initiatives to develop a more innovative and competitive workplace.

Research initiatives that would assist in this fashion include:

- ***To identify and characterize firms in growth sectors and determine their workplace and infrastructure needs.***

- ***To construct a database that reflects the changing nature of the workplace.***
This database must more adequately reflect the changing nature of the economy and the new characteristics of the workplace that are important in this economy rather than the traditional indicators currently in use. Current data sources do not capture indicators important for today's economic environment.

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- ***An assessment of employee skills, levels of training and education and the transferability of their skills.*** This would be difficult, expensive and time consuming to undertake for the entire workplace. It would be best to select specific industries and use them as case study examples. Case study work could focus on both growth industries (the new economy) as well as the more traditional sectors. It would be important in these case studies to collect and highlight information required within the context of the changing economy, changing technology and the different ways of doing business.
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- ***To undertake case studies of management practices and labour-management relations.*** It would be particularly important to focus on success stories where labour and management are working effectively as a team to create a more competitive and dynamic operation. The focus of this work should be on documenting and highlighting management practices and successful frameworks for labour/management team work. The work should also examine the transferability of these success stories to other industries in the workplace.
- ***A useful piece of work related to the above would be an analysis of the Winnipeg workplace work ethic and the productivity of the workplace.*** The focus in this case should be on developing new indicators to measure the work ethic, developing benchmark material and then conducting comparative studies with other appropriate centres.
- ***An analysis of the entrepreneurial (management) sector of the workplace.*** Although our data sources and understanding of the workforce is limited, the

literature suggests we know even less about the management and owners of business in Winnipeg. Without a more complete knowledge of the strengths and weaknesses of this side of the workplace it is difficult to plan effective initiatives to make the workplace more innovative and competitive.

- ***Within the Winnipeg context it is also important to document in more detail the position of the Aboriginal population in the workplace.*** Their current involvement in the workplace, their skills, their entrepreneurial initiatives, and areas that should be the focus of further education and training have to be much better documented. This is an extensive piece of work but it is certainly required in any effort to more effectively integrate the Aboriginal population into the workplace.
- ***An analysis of highly qualified personnel (HQP) leaving the province.*** Are our highly skilled graduates and workers leaving the province? If so, why and where are they going? What sectors have to be promoted to keep them employed in the province?
- ***Work that recommends policy changes and initiatives concerning the workplace environment that will allow it to operate more effectively and improve competitiveness.*** This aspect is one of the last components of any work plan as it depends on information collected in previous components of the work.

These eleven recommendations certainly do not include all the areas of work that the review of literature and data suggest are required. Work in the above areas, however, would place Winnipeg 2000 in a better position to introduce effective workplace initiatives.

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NOTE: Besides the references listed above, there are 22 examples of sectoral studies from Workforce 2000. Only the title pages and table of contents or introductions have been provided.

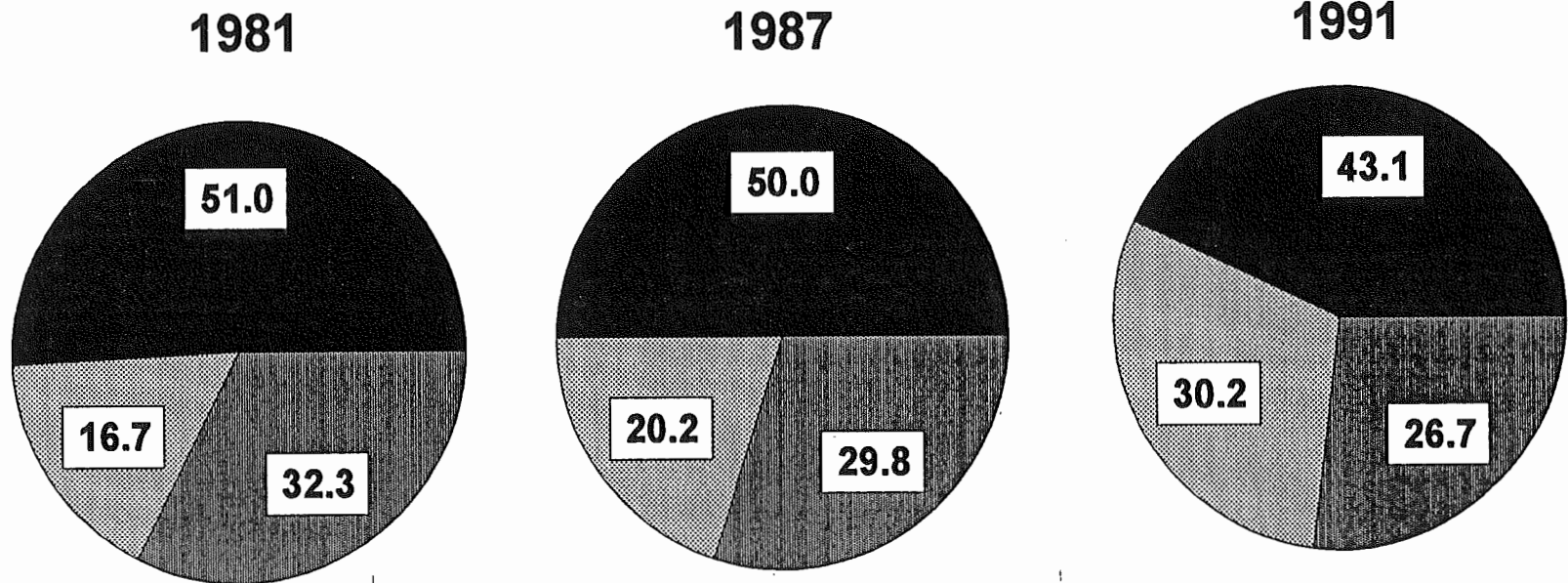
APPENDIX A
Graphs and Charts

All data in the following graphs have been taken from Statistics Canada publications.

Figure 1

EXPORTS AS A PERCENTAGE OF GDP

Manitoba - 1981, 1987 and 1991



LEGEND

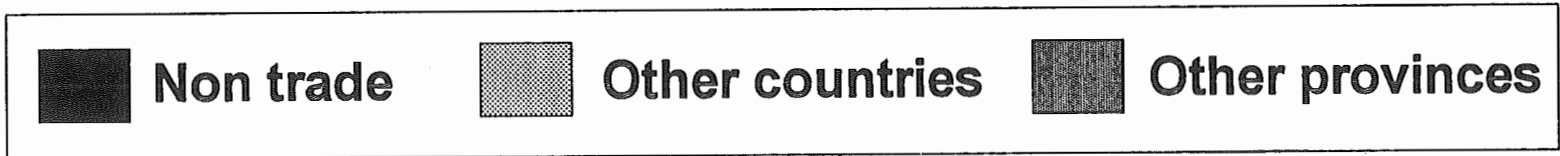
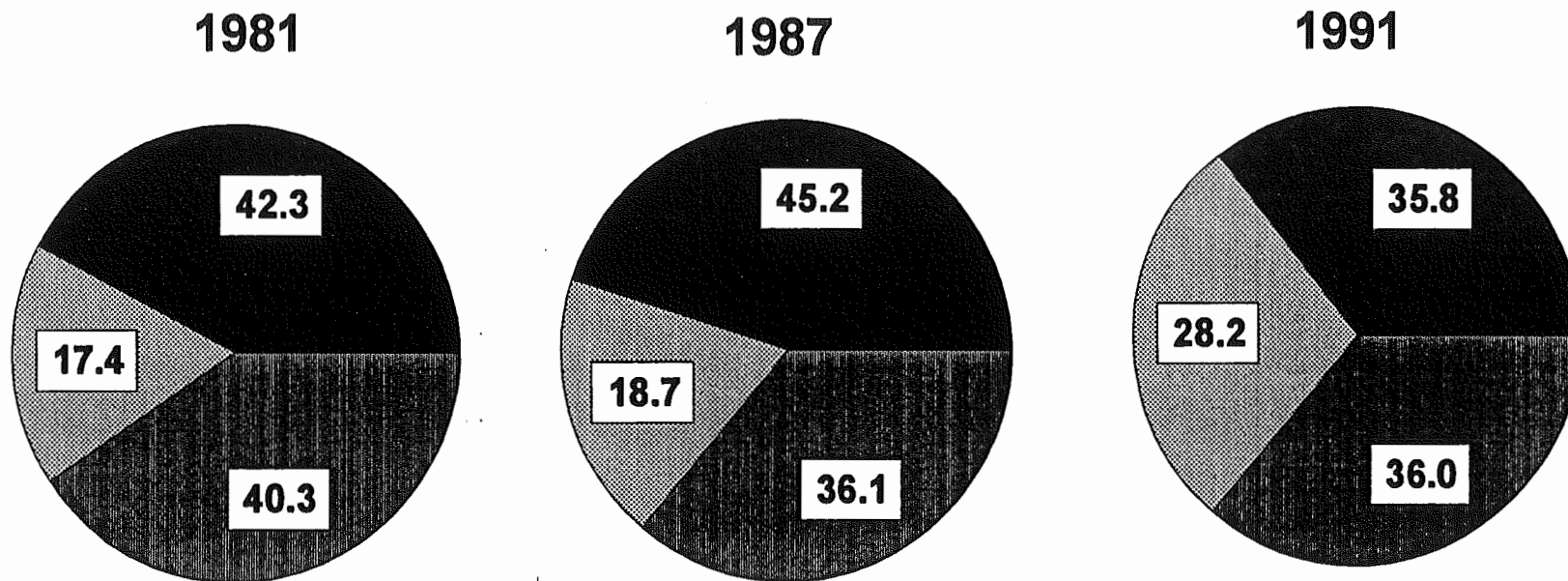


Figure 2

IMPORTS AS A PERCENTAGE OF GDP

MANITOBA - 1981, 1987 and 1991



LEGEND

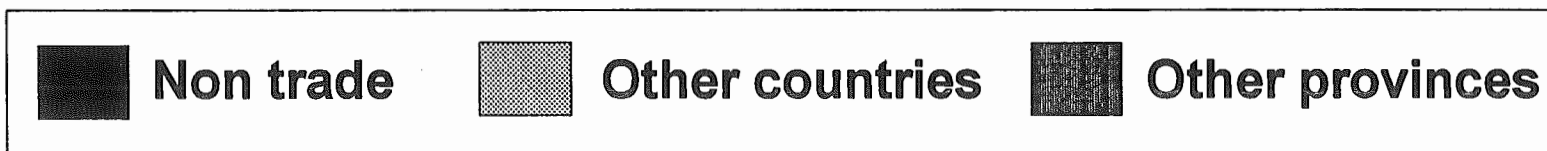
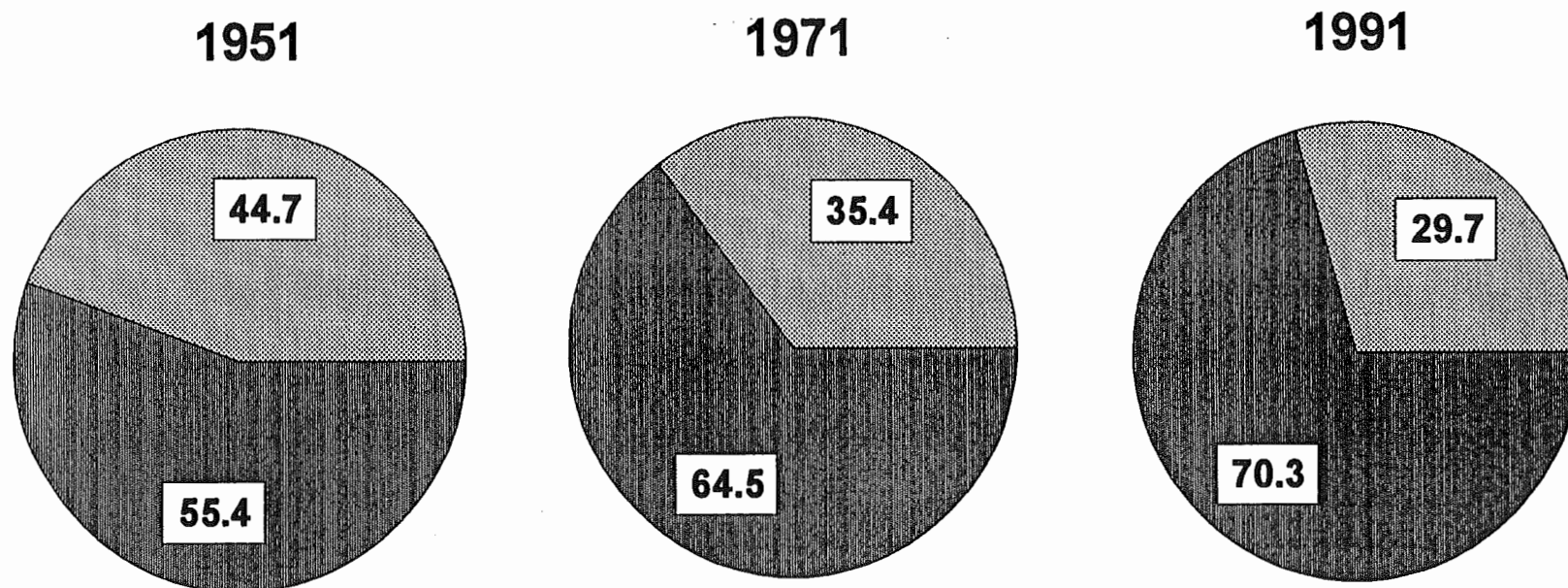


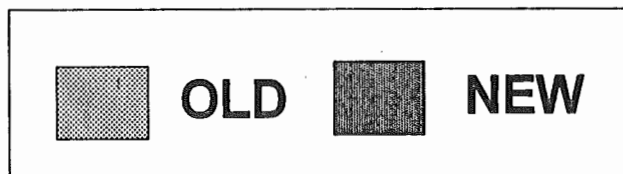
Figure 3

WINNIPEG: CHANGE IN THE POST WAR PERIOD

Old and New Economy, 1951, 1971 and 1991



LEGEND



**OLD ECONOMY - Primary, Manufacturing, Construction, Transportation
Communications and Utilities**

**NEW ECONOMY - Trade, Finance, Insurance and Real Estate, Public
Administration and Services**

Figure 4

INCREASE IN POPULATION

Western Canadian Cities 1986 - 1991

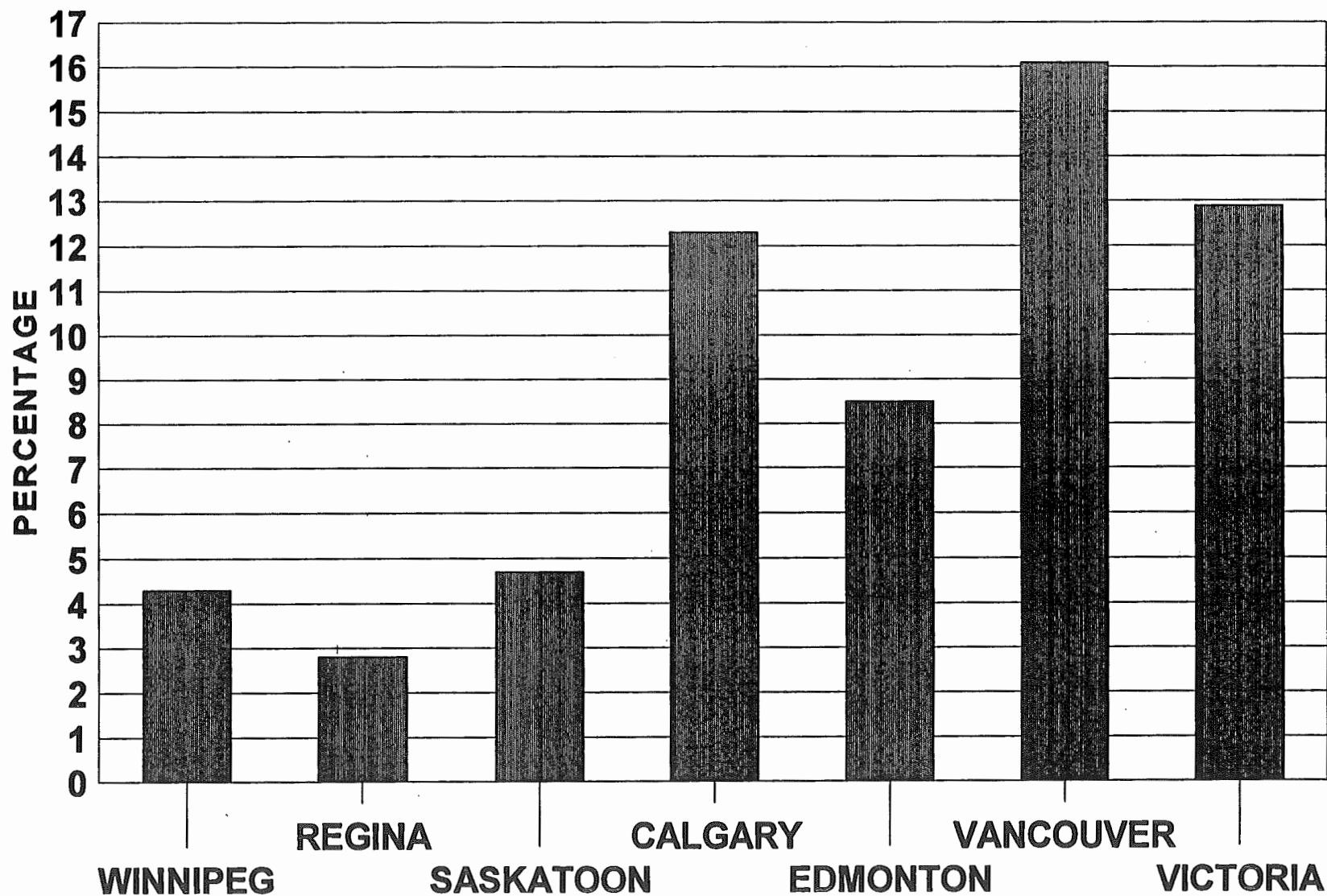


Figure 5

POPULATION OVER 65 YEARS OF AGE WESTERN CANADIAN CITIES 1991

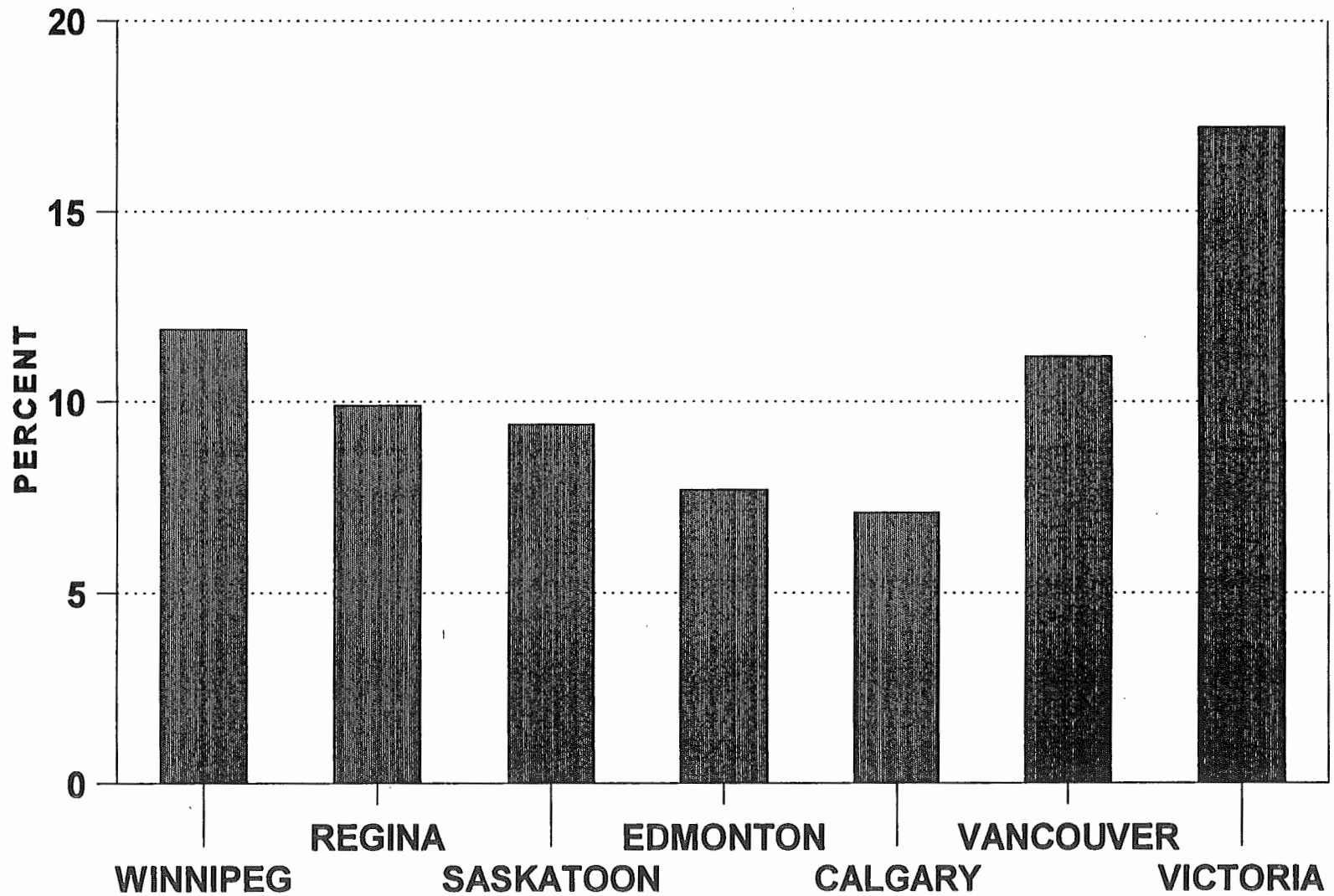


Figure 6

POP. > 15 YEARS WITH LESS THAN GRADE 9

Western Canadian Cities 1991

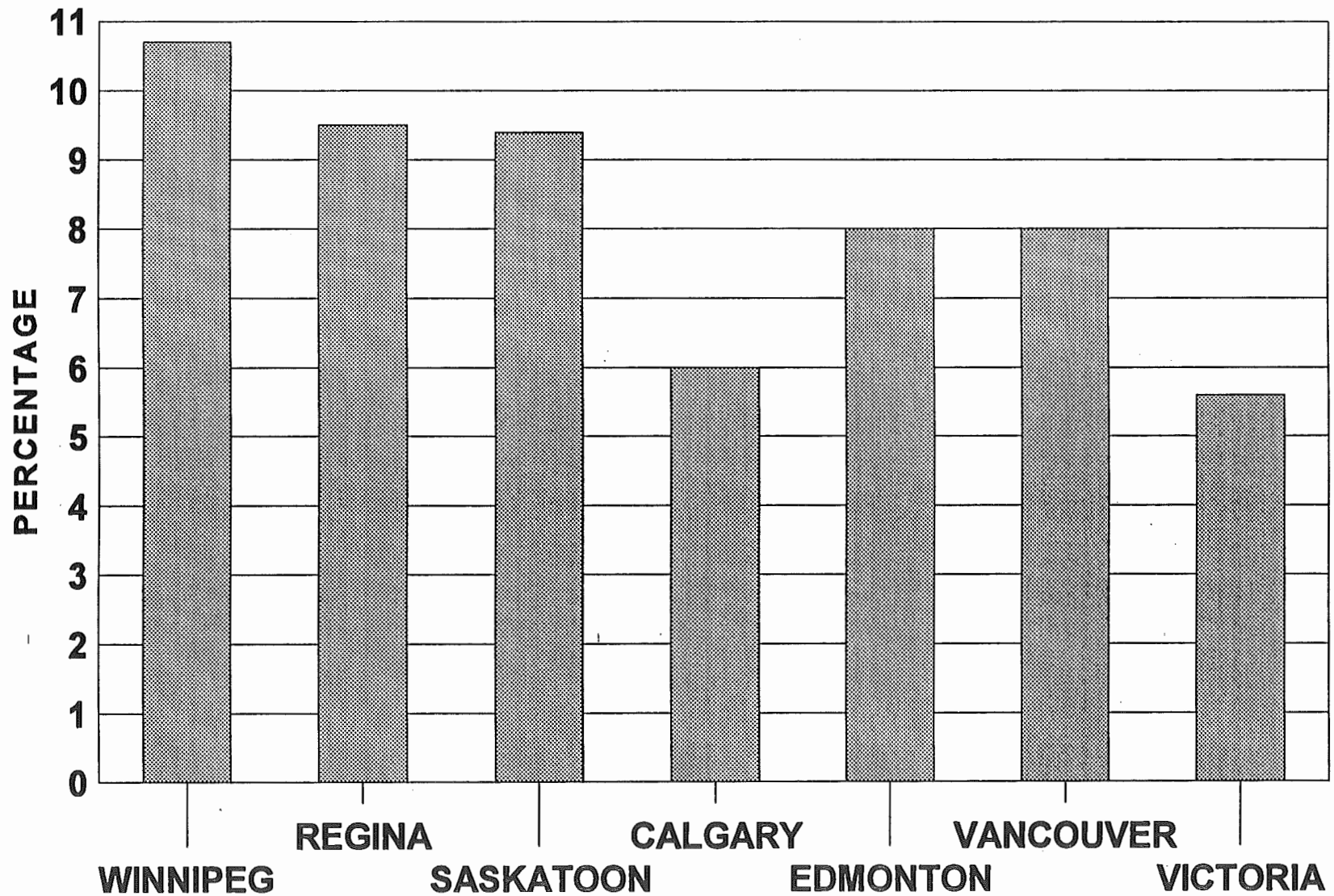


Figure 7

HOUSEHOLD MEDIAN INCOME

Western Canadian Cities 1991

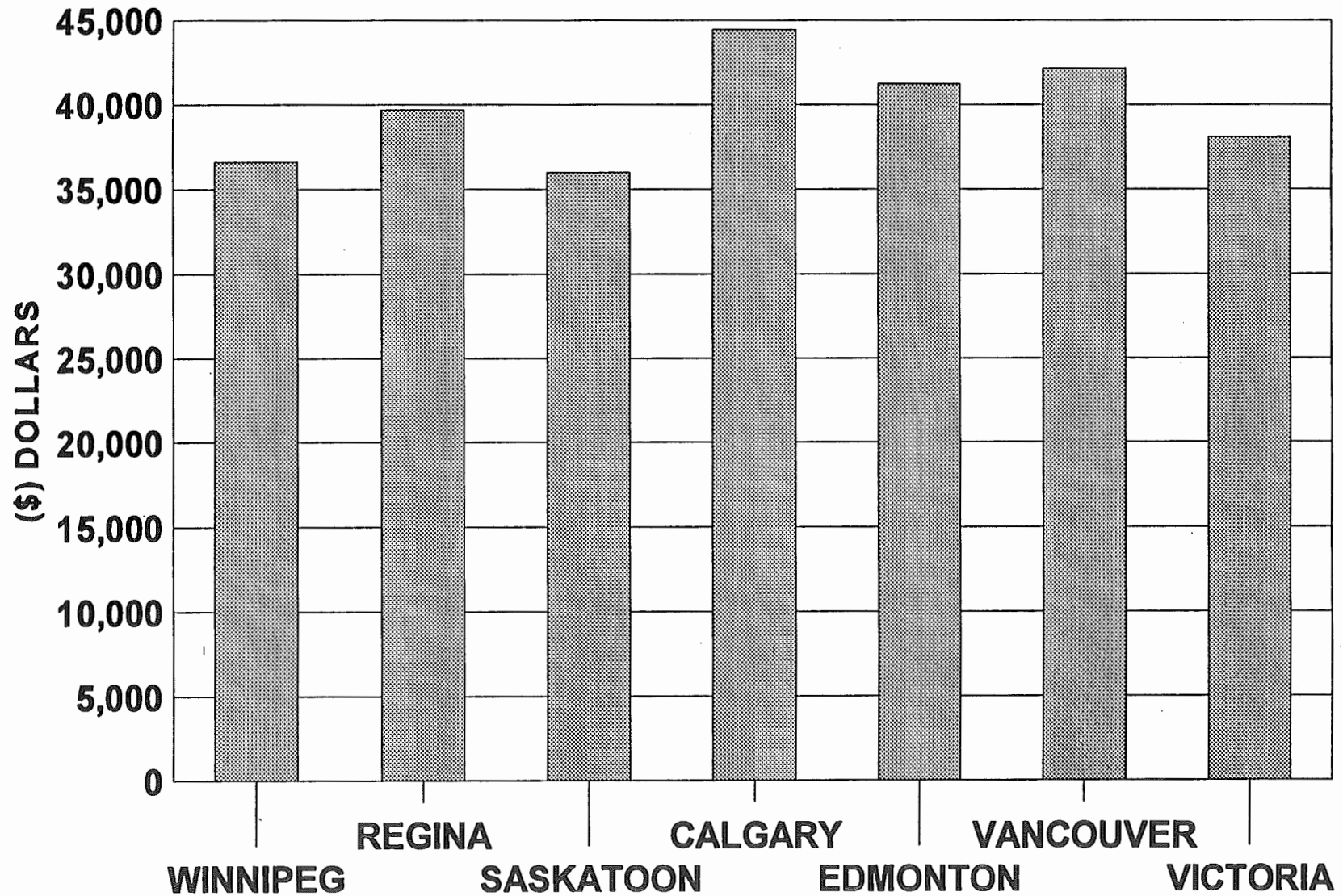


Figure 8

HOUSEHOLDS BELOW POVERTY LINE

Western Canadian Cities - 1991

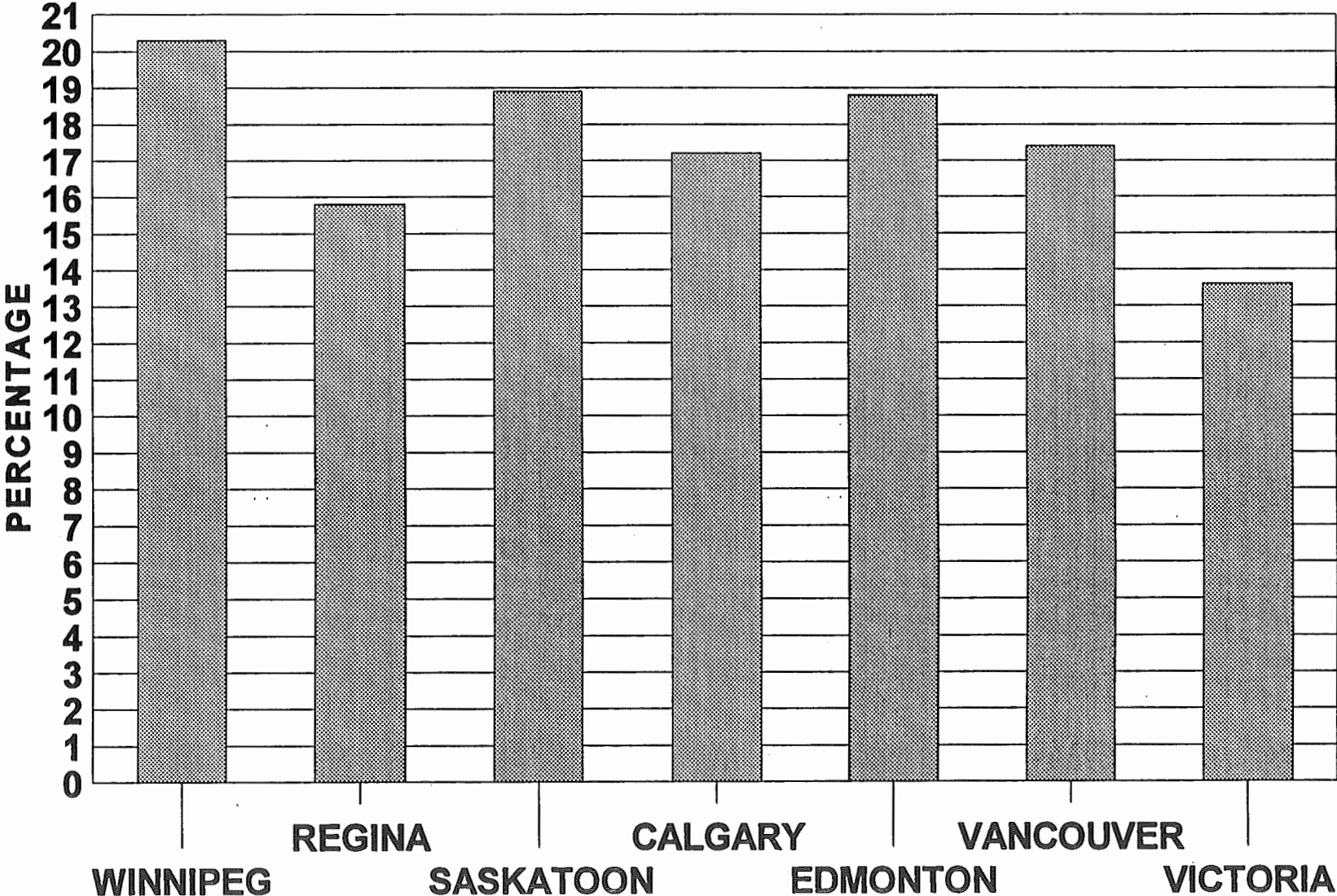


Figure 9

LABOUR FORCE GROWTH RATES

Western Canadian Cities 1987 - 1994

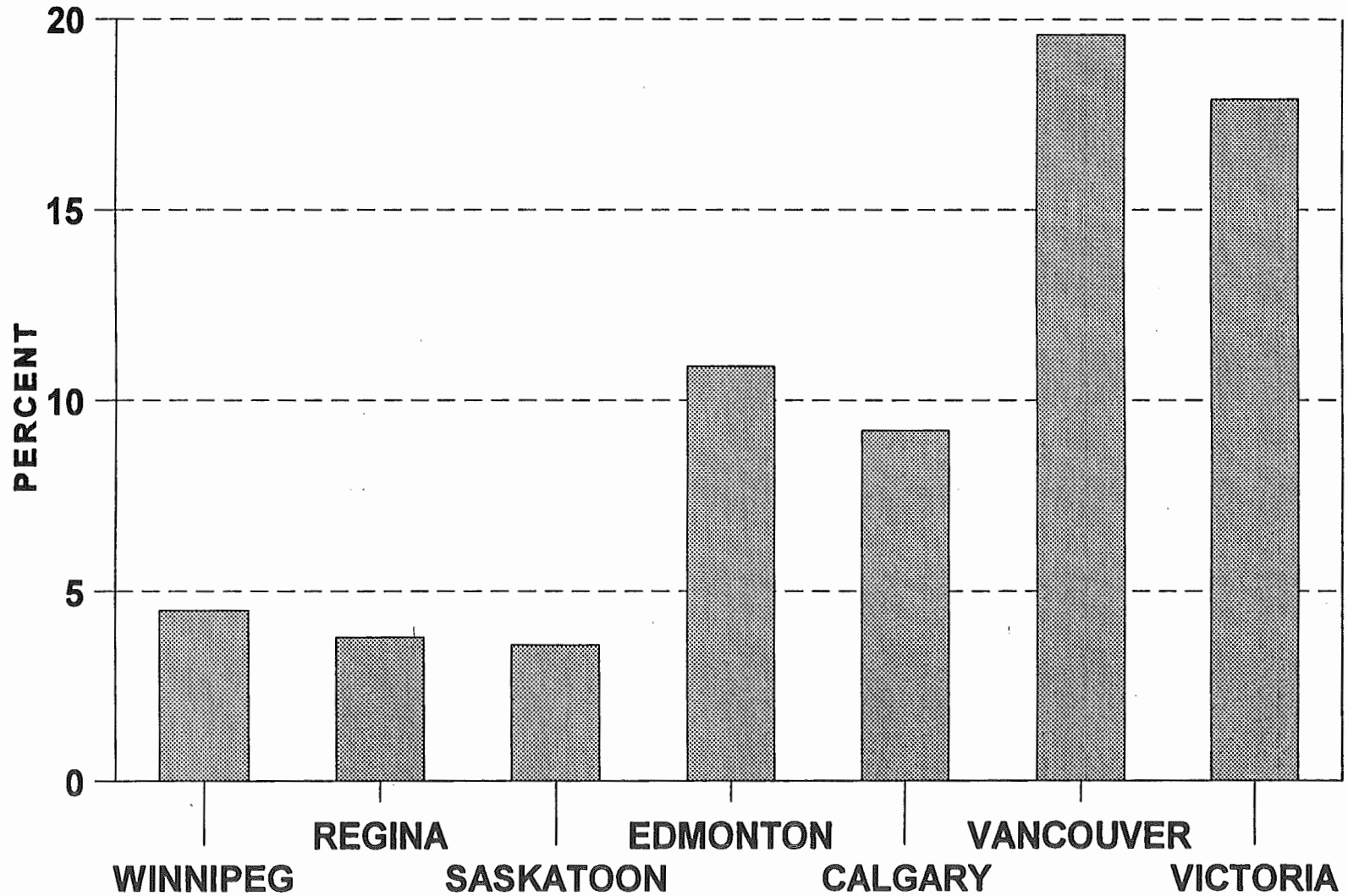


Figure 10

UNEMPLOYMENT RATES AGE 15-24

Western Canadian Cities - Annual Averages 1994

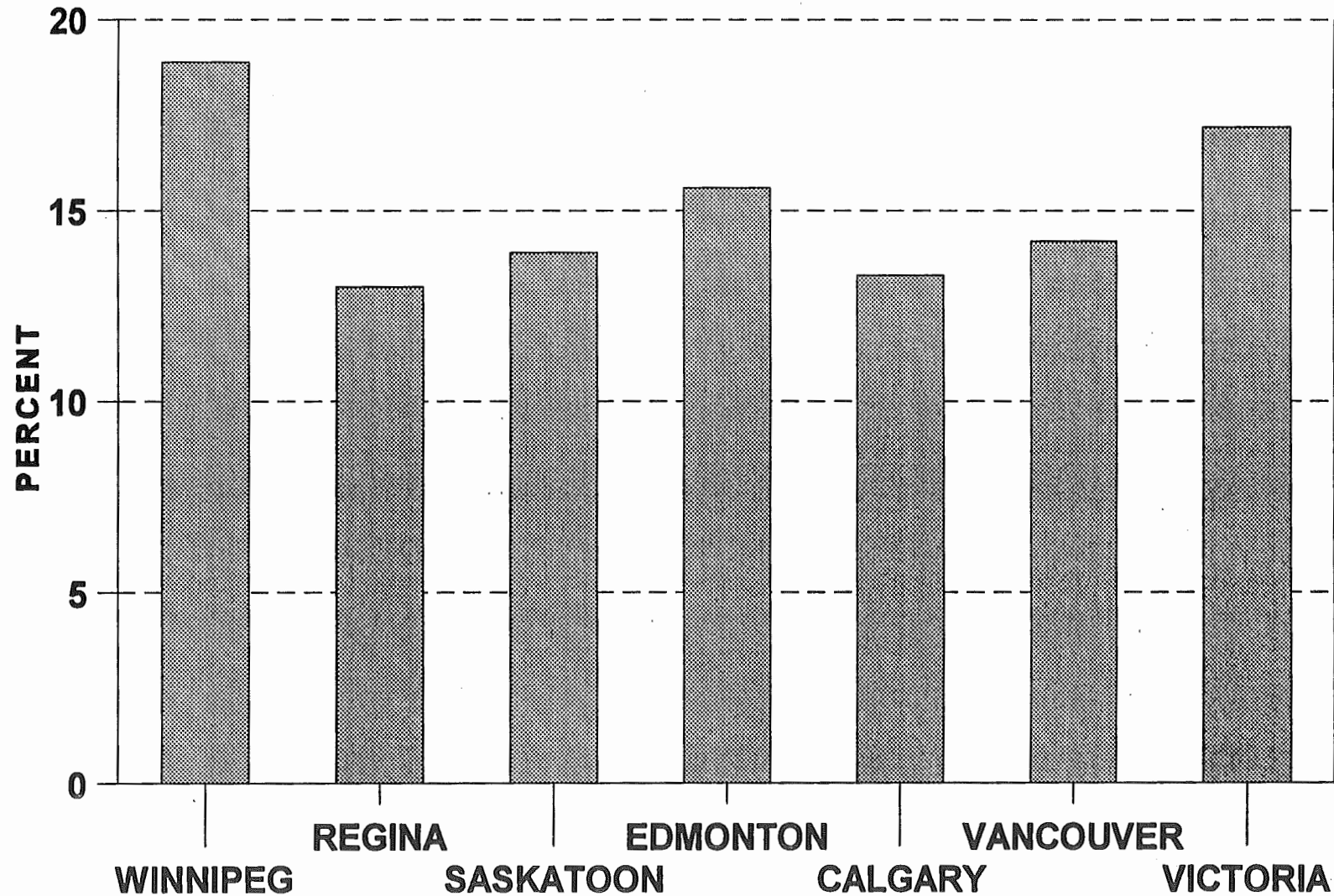
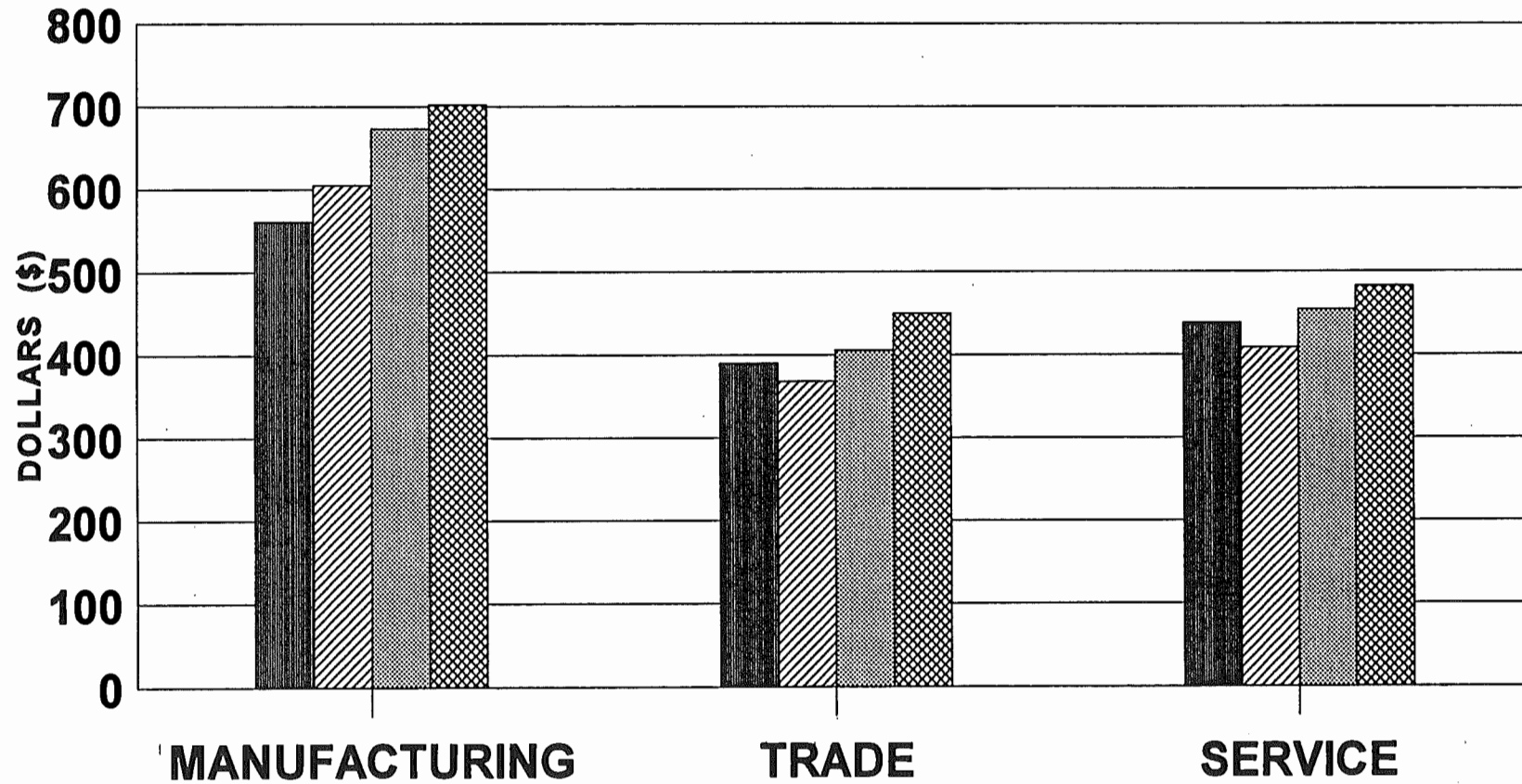


Figure 11

AVERAGE WEEKLY EARNINGS

By province - 1994



LEGEND

	MANITOBA		SASKATCHEWAN
	ALBERTA		BRITISH COLUMBIA

Figure 12

AVERAGE VALUE OF THE STOCK

Western Canadian Cities 1991

