

British Columbia and its Regional Economies: An Overview of Research Issues

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Introduction

These are challenging times for British Columbia (BC). During 2003 the province was buffeted by the worst forest fires season for many decades, mad cow disease, floods, the SARS virus, the dampening effect on BC's exports of an unprecedented 20 % jump in the Canadian dollar relative to the US currency, and punitive tariffs on softwood lumber in US markets (Finlayson 2003). Nonetheless, BC's relative economic growth pulled ahead of the national average, the first time this had happened in ten years (see the 2002-03 ranking of labour force growth in Table 1). Indeed, much of the 1990s was in stark contrast and characterized by the province's poor performance, especially in the area of business investment and non-energy exports. With a regional GDP (gross national product) of approximately \$100 billion, BC is the third largest provincial economy in Canada. In 2000, its population stood at roughly 4.1 million, an increase of 24.0 % over the 1990 level, realizing an average annual growth rate of 2.6 % during the decade (Wood 2001). Even so, BC has suffered from a long-term structural decline that began in the 1980s and continued through the following decade. Moreover, in the late-1990s BC lost tens of thousands of residents per year to other provinces. At the end of the last decade under a New Democrat Party (NDP) government (1992 to 2001), it

TABLE 1 Labour Force Estimates for Canada and the Provinces, Annual Averages ('000), 1995-2003

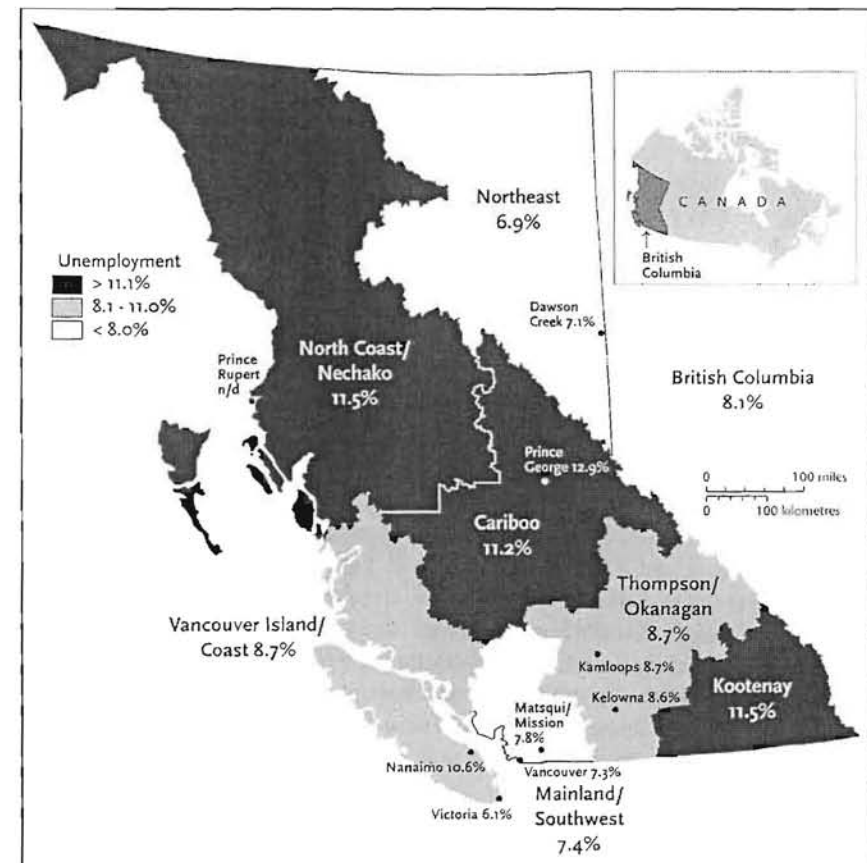
	1995	2002	2003	1995-03 (%)	2002-03 (%)
Newfoundland	194.3	213.9	217.8	+12.1	+1.8
Prince Edward Island	57.3	67.1	68.8	+20.1	+2.5
Nova Scotia	377.1	428.4	435.4	+15.5	+1.6
New Brunswick	309.9	345.6	345.0	+11.3	-0.2
Quebec	3147.5	3592.7	3649.9	+16.0	+1.6
Ontario	5130.6	6068.0	6228.5	+21.3	+2.6
Manitoba	519.0	567.0	568.7	+9.5	+0.3
Saskatchewan	459.4	482.0	486.8	+6.0	+1.0
Alberta	1369.3	1673.8	1814.9	+32.5	+8.4
British Columbia	1792.3	1973.4	2023.3	+12.9	+2.5
Canada	13356.9	15411.8	15746.0	+17.9	+2.2

Source: Statistics Canada, Labour Force Survey, Annual Averages, Table Cd1T01an.ivt

became a 'have-not' province within Canada,¹ and in 2001 it dropped to 10th place among all provinces in terms of economic performance from fifth place in year 2000 (Finlayson 2001). Nonetheless, it continued to hold third position in Canada for levels of real personal disposable income per capita, a key measure of standard of living, and was placed sixth on the employment rate for 15 to 64 year olds in 2001, down from fifth place in year 2000 (British Columbia Progress Board 2002a).

Against this backdrop, metropolitan Vancouver loomed even larger within the British Columbia economy. In 2002, it accounted for 53 % of the province's GDP and 55 % of all jobs. It was also the region where the vast majority of large BC companies located their head offices (Finlayson 2003). Together with Greater Victoria (also known as the Capital Region of BC), the south-west corner of the province contained the leading growth industries. Prominent among these have been computer design and software development, motion picture and sound production, information services, telecommunications, bio-technology and health research, business and professional services, large-scale transportation (especially

1. 'Have-not' provinces are those that receive equalization payments from the Canadian federal government. Besides British Columbia they include Saskatchewan, Manitoba, Quebec and the four Atlantic provinces (DeCloeet 1998).

**FIGURE 1** British Columbia Unemployment Rates 2003

Source: Statistics Canada, Labour Force Survey (Annual Averages)

the Port of Vancouver and Vancouver International Airport), aerospace and various other segments of non-resources manufacturing (Goldberg 2003). Alongside the ski resort town of Whistler, metropolitan Vancouver is also where the positive economic spin-offs stemming from the forthcoming 2010 Winter Olympics will be most visible (Ministry of Community, Aboriginal and Women's Services, BC 2002).

This special collection of articles on 'British Columbia and its Regional Economies' brings attention to recent research focusing on regional planning initiatives and developments outside of the prosperous metropolitan south-west of the province. Figure 1 immediately draws attention to the uneven distribution of economic growth in BC. Hence, even though the province recorded significant growth in 2003, unemployment varied remarkably, from 7.3 % in Vancouver and 6.1 % in Victoria, to 11.2 % in the Cariboo Region, and 11.5 % in the Kootenay Region and also in the North Coast/Neckho Region (see Figure 1). For economic

recovery to be more equal throughout BC, not only must traditional resource industries play their part but promising opportunities for new resource-based development as well as diversified manufacturing and service sectors must also develop in non-metropolitan centres. This will be a significant challenge. Together, the articles in this volume suggest that BC is at a developmental crossroads, requiring new ways of conceptualizing the spatial structure of the province and rethinking the role of governments and public agencies in regional progress and promotion.

Background

In the past, the most influential theory linked to BC's regional development had been the 'staples model' proposed by political economist Harold Innis (Innis 1999). Although applied principally to Canada as a whole, Innis conceived resource economies as comprising a core-periphery structure of inter-regional linkages and relationships. "At the broadest level this implies a high asymmetrical and dichotomous spatial framework, characterized by a dominant, industrialized metropolitan 'core' and a vast, underdeveloped 'periphery' almost wholly dependent on the production and export of staple commodities" (Hutton 1997: 233). Barnes (1996) notes that the Innisian model has been highly applicable to British Columbia as its early settlement and development was very much tied to resources such as gold, forestry, fish, agriculture and energy, while Vancouver emerged as the principal control centre for resource extraction. Indeed, this 'core-periphery' trope became firmly entrenched as a way of explaining regional development dynamics in the province.

For instance, in 1947 a British Columbia legislative committee on Post-war Rehabilitation recommended major projects as a way of 'opening up' large sections of inland BC, and this advice was followed to 1952 by the BC Coalition government (through the implementation of the Hope-Princeton Highway, the Alcan aluminium refinery at Kitimat, the attraction of new investment into the timber industry by granting forest management licenses, and so on). The pursuit of developing BC's peripheral regions was taken up even more vigorously by the Social Credit government of premier W.A.C. Bennet (1952 to 1972), who closely adopted the 1947 report and was able to bring its key elements into action, yielding a prolonged period of commodity-led growth. In the post-World War II period, his government embarked on a series of major projects in BC's peripheral regions, including dams, hydroelectric power and transportation links (e.g. highways, bridges, rail lines, and ferry services). Multiplier effects between these public and a range of private investments (such as forestry, mining and metal industries) resulted in increased employment links, and from 1947 to 1981 the interior, north and mid-to-upper Vancouver Island were the growth generators and leading regions of BC (De Wolf 2002). However, as noted by Barnes et al (1992), 'fordist' style industries run on mass-production lines (e.g. pulp mills and timber mills) and large corporate involvement, often with overseas capital, led to few sustainable

TABLE 2 Labour Force Estimates for British Columbia and its Regions, Annual Average ('000), 1995-2003

	1995	2002	2003	1995-03 (%)	2002-03 (%)
Vancouver Island	309.9	311.9	313.1	+1.0	+0.4
Lower Mainland	1055.8	1221.6	1258.6	+19.2	+3.0
Thompson-Okanagan	194.7	210.0	220.3	+13.1	+4.9
Kootney	69.7	68.3	69.5	-0.3	+1.8
Cariboo	80.4	81.9	81.6	+1.5	-0.4
North Coast/Nechako	49.1	46.3	46.2	-5.9	-0.2
Northeast	32.7	33.4	46.2	-5.9	-0.2
British Columbia	2951.2	3325.0	3365.5	+14.0	+1.2

Source: Statistics Canada, Labour Force Survey, Annual Averages, Table Cd1T30an.ivt

forward and backward linkages. Indeed, when external demand for resources declined during the early 1980s, then the local multiplier effect also worked quickly, but in reverse fashion. Nonetheless, 'mega-project' strategy (e.g. the northeast coal fields at Tumbler Ridge, BC) continued to be a major government sponsored program throughout the following decade (Halseth and Sullivan 2002).

Meanwhile, the core of urbanized settlement remained focused in the south-west corner of BC on metropolitan Vancouver and Victoria. The resort town of Whistler emerged as yet another centre in the south-west region, both for winter skiing and summer hiking. In the 1990s, all three centres evolved into higher-order service functions, including substantial tourism flows following the Vancouver World Expo of 1986, and increased immigration from Hong Kong (Edgington and Goldberg 1992; Hutton 1998). As shown later in this special edition, second level cores have also evolved in the south and central interior of BC -- at Kelowna (Okanagan), Kamloops, and Prince George (with a new university in 1994) -- and at the port towns of Nanaimo and Prince Rupert (Figure 1).

The Current Economic Picture

In the prior two decades up to 2003, economic development in the province gradually tended to unsettle the Innisian core-periphery metaphor, at least in its most simple form. To begin with, the BC hinterland struggled as demand for the province's resources declined. For example, in the 1981 to 1991 census period, 360,000 new jobs were created in BC, yet all but 1,000 jobs occurred in the Lower Mainland, Vancouver Island and the Thompson-Okanagan region (De Wolf 2002). More recent data points to a continuation of these trends. Thus, Table 2 indicates that of the seven labor force development regions in BC recognized by Statistics Canada, only three recorded any net job growth from 1995 to 2003; Vancouver Island, the Lower Mainland and Thompson-Okanagan (although the Kootney

region recorded positive growth in 2002-03). Overall, most labour force expansion took place in the broad services sector, which can be explained in large part by the reinforcing effects of agglomeration economies in the major BC urban centres (ibid.).

The lack of growth in most regions of BC was due mainly to weakness in the province's non-energy resource industries - forestry, metal mining and commercial fisheries. Declining markets, low levels of investment and dwindling activity in these sectors undermined the economic fortunes of scores of local communities, notably in the BC interior, along the central and north coast, and in parts of the Kootney and northern Vancouver Island (see the higher than province unemployment rates denoted in Figure 1). While Vancouver's economy continued to diversify over the 1990s with new industries, in much of rural BC capital investment essentially ceased to grow. The problem evident in this part of the province has been that its critical resource export base functioned largely on an out-moded 1970s management and production model (De Wolf 2002). Indeed, the declining fortune of the BC forestry industry may be used as an indicator of what has been wrong in the non-metropolitan regions.

By way of example, McGillvray (2000: 115) noted that the forest sector had long been the backbone of the BC economy and up until the 1970s. "it was widely proclaimed that fifty cents of every dollar spent in the province was generated by this industry" (quoting Farley 1979: 87). For much of BC's history, the vast economic rents associated with the province's natural resource endowments provided a source of steady and relatively high incomes. Today, forestry remains crucial to the province and many individual communities, and forest products has remained BC's leading export. According to recent estimates, this sector accounted for over one-half of all provincial manufacturing, over 10,000 jobs, and approximately one-quarter of the top 100 offices in BC. Assessments of the industry's contribution to provincial GDP have ranged from 15 to 25 % (Hayter 2000). However, in the last twenty years or so BC's competitive position in the global forestry arena has been seriously challenged. For instance, the province used to be one of the cheapest places in the world to produce pulp, but today it is one of the most expensive, due in part to the increased environmental challenges and regulations for harvesting timber. Moreover, since the 1997-1998 Asian financial crisis, BC has faced severe competition with Southeast Asian countries, such as Indonesia where currencies have declined substantially in value, timber fibre for pulp production has become more inexpensive and the cost of labour is now only a fraction of BC provincial levels. Accordingly, over the last decade or so, increased competition in overseas markets has led to a fall in BC's relative production and absolute employment levels, the contribution of the forestry industry to provincial revenues has weakened, and as a result the continued existence of many rural communities has been threatened. There is certainly a need by forest communities, industry and the government to respond to a variety of complex and interconnected forces that arose in the 1990s, including global commodity price declines, increased environmental sensitivities, increased land use regulations, unresolved aboriginal land claims, and protection in the United States markets. Nonetheless, Hayter (2003)

points out that the very shrillness of business demands, the environmental movement, and First Nations native Indian influences, have acted to undermine the authority of provincial governments to respond and create more rational forestry policy.

Planning for the BC Heartlands: The '250 Project'

The above narrative suggests that in general the provincial development approach since the beginning of the 1980s has been characterized by a lack of any compelling vision for the non-metropolitan regions of BC, especially compared with previous decades. There appears to have been little in the way of appropriate programmatic commitment, or any genuine local and regional engagement. Hutton (2002: 6) argues that "this weak regional development policy experience many not have mattered so much in an era of unbounded resource stocks, strong export markets and relatively weak international competition. However, the opening years of the new millennium present a very different context, and there is a need to develop more imaginative and innovative approaches to the future of BC's regions and constituent communities". In particular, he goes on to note, there is a need to develop more nuanced perspectives of the development potentials of individual regions in British Columbia outside the metropolitan south-west.

Clearly, the crude Innisian model of two regions (BC's core and its periphery) has to be modified, especially in light of recent trends leading to the emergence of secondary centres such as Kelowna, Kamloops and Nanaimo (Figure 1). Here, there have been a number of 'success stories' of regional diversification; but in other parts of BC outside of Victoria and the Lower Mainland there have been continuing concerns that divergence in the province's rural regions will likely produce sharply polarized development patterns. Indeed, there is a more general unease that increasing socio-economic disparities will lead to political and social alienation if unchecked. Commenting on these disquieting trends, Hutton (2002: 2) has contended that British Columbia at the turn of the millennium was at a developmental (and policy) crossroads. Regional development in BC requires "more effective deployment of the full range of regional resources as well as natural and physical resources, implying new approaches to public policy, as well as new development models for British Columbia's diverse regions". For the provincial Liberal Party government elected in 2001, the increasingly urban-oriented pattern of economic development in BC during the 1990s also represented a political as well as policy dilemma. This was because roughly half of the 79 Members of the Legislative Assembly (MLAs) hailed from electoral ridings outside the Vancouver region, many of which included resource-dependent constituencies that had been represented by the NDP from 1993 up to the election of the new BC government (Finlayson 2003).

After being elected, the Liberal Party government formed the BC Progress Board, an independent Panel of eighteen eminent British Columbians from a

TABLE 3 Population Estimates for British Columbia and its Regions, Annual Average ('000), 1995-2003

	1995	2002	2003	1995-03 (%)	2002-03 (%)
Vancouver Island	693,916	718,306	719,892	+3.1	+0.2
Lower Mainland/Southwest	2,131,469	2,417,365	2,445,508	+14.7	+1.2
Thompson-Okanagan	456,431	488,345	490,741	+7.0	+0.5
Kootney	149,872	151,799	151,948	+1.3	+0.1
Cariboo	168,813	166,841	166,928	+1.3	+0.1
North Coast	70,070	64,601	64,098	-7.8	-0.8
Nechako	43,479	43,792	43,518	+0.1	-0.1
Northeast	62,954	63,932	63,947	+1.6	+0.0
British Columbia	3,777,004	4,114,981	4,146,580	+9.8	+0.8

Note: Regional boundaries are from the 2001 Census and are slightly different to those of Table 2.

Source: Population Section, BC Stats, Ministry of Management Services, Government of British Columbia.

variety of backgrounds (British Columbia Progress Board 2004). The Board was tasked with benchmarking BC over time as well as relative to other jurisdictions, and also with providing strategic advice to the Premier on measures to improve provincial economic performance and the well-being of British Columbians. In its initial report, the Board was struck by findings that demonstrated to what extent BC's regional economies beyond Vancouver and Victoria had fallen behind the provincial average in incomes and jobs, as well as housing starts (BC Progress Board 2002a). In line with its mandate, the Progress Board then established a Panel on Regional Economies called 'Project 250', indicating the portion of the province covered by the '250' telephone area code beyond the Lower Mainland.² It also happens that these two areas of the province have had almost identical populations: the Vancouver Census metropolitan area accounted for 49.5 % of BC's total population while 'Regional BC' was home to the other 50.5 % (year 2000 figures: source BC Stats). Perhaps surprisingly, both areas have experienced similar rates of population growth in aggregate since 1990 although some districts, such as Cariboo, North Coast, Nechako and Northeast have reported either stagnant or even declines in population since 1995 (Table 3). Only the Lower

2. For BC residents, '604' and '250' are familiar terms for telecommunication area codes. They denote, respectively, the Lower Mainland (Greater Vancouver) census region (including the Fraser Valley east of Langley); and Regional BC, including the Capital Region District (Victoria).

Mainland/Southwest recorded higher than the provincial average population growth from 1995 to 2003 (Table 3). As suggested earlier, jobs and incomes in the 250 Region as a whole have failed to keep up; and this part of the province has seen declining or stagnant investment and lagging export performance in forestry, mining and commercial fishery. This led not only to local job losses but a wider drain on the province's economy and BC's descent into a 'have-not' province status in 1999-2000 (DeCloet 1998).

The Progress Board's recommendations after a year of study reiterated the oft-heard refrain of diversifying the '250 Region's economy' to overcome the boom and bust cycle of local resources sectors. It argued for more effective deployment of a full range of regional resources and attributes, including human, social, cultural and infrastructure capital, as well as the more traditional focus on natural and physical resources. The Board also reasoned that the regions themselves should have a stronger 'voice' in the planning and development process, which had been inordinately 'top-down' in its nature during recent years. This recommendation included a greater use of consultation processes with First Nations people. In addition, the Board pointed to the need for a local 'resource dividend' (as already used in Alaska), utilizing a portion of provincial resource revenues to fund community-managed infrastructure and research and development activity so as to increase local diversification projects (BC Progress Board 2002b). Other recommendations focused on the need to restore the wealth generating capacity of the land base in the 250 Region - for example, by experimenting with community-based forest tenures, and expanding oil and gas industries. As well, the Panel proposed the identification and nurturing of local clusters of economic activity based around information and human-capital based industries, recreation and tourism, and specialty agriculture. The Panel also urged that the BC government should maintain and improve education, transportation and communications infrastructure that would enhance the prospects of the 250 Region for economic growth (ibid.).

Faced with the 'tough talk' of the Progress Board's final report, the BC government responded with its own 'Heartlands Economic Strategy' in 2003, an approach that was grounded in the proposition that the province's rural regions were in fact the 'heartland' of BC's economic fabric, and not the 'hinterland' as often portrayed. Indeed, the government underlined and bolstered the Progress Board's finding that most (60 %) of BC's export base came from Region 250, and that even though the industrial structure of this portion of the province differed significantly from the Lower Mainland (and Victoria), these two facets of BC were inextricably linked (BC Government 2003).

Perhaps unsurprisingly, reaction to this initiative has been mixed. While the government has pursued the view that its plans would create a more competitive business climate in the 'heartlands', through local red-tape reduction and transportation plans, others have seen it as merely a public relations exercise at a time of severe budget cuts in local health, education and welfare facilities (Dix 2003). Indeed, the strategy reinforced a macro-policy approach, followed by the Liberal Party government since it was elected, of tax relief, regulatory streamlining, and

labour flexibility. There are a variety of specific mechanisms designed to stimulate various sectors in the Heartlands strategy (e.g. forestry, energy, transportation, agriculture, tourism, and new technologies), but there is very little of what might be called a vision for the 250 Region, and no specific reference at all to any special delivery vehicle beyond the traditional program linkages of mainstream Ministries and Departments. For instance, the innovative ideas supported by the Progress Board concerning a local resource dividend and a 205 Region secretariat appeared to have been abandoned (BC Government 2003).

Research on the BC Regional Economies

The papers that follow illustrate the special features of BC's regional dynamics and approaches to regional development as outlined above. The first two papers deal with changes that are occurring within the province's interior region. They revisit the traditional 'core-periphery' or 'heartland-hinterland' nature of BC's spatial economy and point to some significant ways this image has been unsettled, using results from the most recent population census. Thus, Halseth et al analyze population change by BC's regional districts and identify emerging growth centres, such as the Okanagan/Kelowna, Thompson-Kootney/Kamloops, and the Prince George areas. They speculate a number of development approaches that could be followed in the province based upon the emerging characteristics of different hinterland regions. Nelson and MacKinnon build on this analysis by using data on BC's regional district migration and relating this to the province's economic cycles in the past 25 years. They hypothesize four groups of regional districts, specifically non-staples, transitional, traditional staples and depressed staples, according to their net annual migration patterns. Both papers here illustrate well the obsolescence of the simple Innisian dichotomy for explaining contemporary dynamics within British Columbia, and point to the need for more differentiated and complex spatial models.

The next two papers deal with the BC forest economy. Hayter contemplates to what degree metaphors such as 'crossroads' and 'war in the woods' (and their interaction) denote enduring structural problems in this sector. During the 1980s and 1990s, the provincial forest sector experienced considerable and continuous restructuring, leading to the notion of an industry poised at a 'crossroads'. Moreover, a succession of BC provincial governments responded to demands for change in forest policy in a number of ways. However, initiatives introduced by the New Democrat Party, such as the Forest Practices Code of British Columbia Act (1994), new forest stumpage rates, and the Forest Renewal BC program, were not always connected coherently. Competing public and private interests were strident, and so effective determination of public policy issues became more difficult, such as who should benefit from exploiting the forests and what the BC forests should be used for. Indeed, the competing interests of corporate lobbies in the United States against timber imports from BC and elsewhere in Canada, as well as environmen-

talists, aboriginal involvement, local corporations and labour organizations, led to a 'war in the woods' in BC and diverse concern of provincial policy and disagreement over how policy should proceed. Edgington notes that while structural problems have permeated the entire forest industry these were more acute within the coastal segment of the province than in the BC interior region. His research into efforts to market the coastal hemlock species into Japan demonstrates that BC has not been without its own experience of product differentiation, innovation and branding. Beyond forestry, other successful examples in the province might include the 'BC Hothouse' brand of quality vegetables sold in the USA, and the 'VQA wine' trademark (Goldberg 1998, 2003).

The final essay in this collection by Munro focuses upon an evaluation of economic strategies adopted in BC over a 35 year period. The results show that there has been some evidence of effectiveness of industrial development programs in improving the performance of the B.C. economy overall, but the effects have not been strong. This indicates perhaps the need for a developmental model for the '250 region' that is appropriate for the 2000s and 2010s, rather than one steeped in the models of the 1970s and even before then. Moreover, as noted by Hutton (2002) there can be no single template for British Columbia, as its regions are now highly variegated and require individualized approaches. While the Innisian staples theory has been relevant to BC's past development, it may not be in touch with present conditions and future requirements.

To sum up, declining jobs and populations in much of the BC Heartlands present many serious issues regarding the role of regional development policy. However, these are not unique to British Columbia, and so are perhaps best addressed by all levels of government in Canada -- by getting the policy mix 'right' on a range of broad-scale economic and social matters (such as international trade, technology and education), and by private and public sector agencies establishing a vision of their economic future that builds on local strategies. The provincial unemployment rate rose to 9.1 % in September 2003, the highest since 1994. If there is a glimmer of hope for the Heartlands, it is in the growing prospect of the oil and natural gas sector, seemingly poised for a boom in the north and in the Cariboo region, although fraught with environmental dilemmas (Ministry of Energy and Mines, BC 2004). Greater Vancouver has recently outpaced the rest of the province in population growth, job creation, housing starts, retail sales growth, non-residential investment and the formation of new businesses. Taking a longer-term perspective, the Vancouver region has undergone a significant economic transformation and diversification in the past two decades, even as the industrial structure in the rest of the province remained fairly stable. To some extent, this has shielded it from the economic weakness of other BC regions. Still, logging, wood manufacturing, pulp and paper, and coal and metal mining continue to carry considerable economic clout in the Vancouver region, partly because of the presence of corporate offices, but also because they are responsible for the lion's share of provincial exports and manufacturing shipments. The resource sector also serves as a vital source of demand for thousands of BC businesses in industries, such as transportation, business and financial services, as well as

scientific and technical services (Finlayson and Peacock 2004a).

More research is required to examine the role of major public and private projects in British Columbia, the forest sector, the regional information sector, recreation and tourism, as well as specialty agriculture. In particular, a key to enhancing the prospects of both urban areas and the 'Heartlands' is a greater understanding of the degree to which these two parts of the province are mutually inter-dependent. For instance, how does the Lower Mainland influence the productivity of traditional resource and new tourism industries in the BC's Heartlands? Conversely, to what degree does expansion in the Heartlands provide important markets for specialized services located in the Lower Mainland, such as transportation, marketing, finance and construction? At a broad policy level, growth in all of BC's regions will require government, business and individuals to focus on efforts to maintain competitive businesses and personal taxation rates, to build on an educated and skilled workforce, and tackle issues such as gaining access to markets and other business impediments on a sector-by-sector basis. At the time of writing, many analysts are more optimistic that the conditions are in place for an improvement in the short term, with BC's GDP forecast to rise to 3 % in 2004 (Finlayson and Peacock 2004b). But in the long-term, forecasts are decidedly mixed, realizing that the province as a whole faces many challenges.

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