

Re-Considering Market Development Approaches to Support Nunavut Inuit Priorities in the Seal Market

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ABSTRACT: Seal hunting is a long-standing cultural practice for Inuit, who have also long participated in the commercial seal market. Inuit were negatively impacted by anti-sealing campaigns that resulted in international trade bans and subsequent market collapses for seal products. To improve market access for Inuit seal products, the Canadian government established the Certification and Market Access Program for Seals (CMAPS) to support export of Inuit seal products in European Union markets. In 2015, the Government of Nunavut became an Attestation Body under the EU Indigenous Communities Exemption, which enables the Government to certify Nunavut seal products for export into EU markets. To date, market development efforts have largely focused on supporting the export market for Nunavut sealskins, while less attention has focused on how such efforts impact the local value chain and meet the needs of Nunavut Inuit involved in the seal market. Focus group discussions with Inuit value chain actors in Iqaluit and Qikiqtarjuaq provide insight into the Nunavut seal value chain and explore perspectives of how government policies and programmes are meeting the needs of Nunavut Inuit. Findings revealed multiple gaps in the local value chain that have gone largely unaddressed due to a priority on export markets over the local value chain. These gaps limit export development opportunities and the ability for the seal market to adequately meet the needs of Nunavut Inuit and Nunavummiut alike. Collectively, this study demonstrates the importance of centralizing Inuit in economic development policies to support local economies and ensure Inuit priorities are met.

Keywords: Inuit; value chain; sealskin products; market development; local capacity; Canada; European Union; trade ban; provenance; self-determination

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INTRODUCTION

Sealing has been a long-standing cultural practice for Inuit for thousands of years and continues to provide food security and economic return to hunters, artisans, and communities. While Inuit have always hunted, eaten, and worn seal products for their own subsistence, they have also long taken part in the commercial trade of sealskins since the first trading posts were established across the Arctic by the Hudson's Bay Company (GN, n.d.b). As colonialism ensued throughout the mid-20th century, the trade of sealskins allowed Inuit to transition into the cash economy while still carrying out traditional and cultural activities. However, this market was disrupted when anti-sealing campaigns began protesting the commercial seal hunt off the coast of Newfoundland and Labrador in the 1960s. Such campaigns had a large influence in persuading many nations to ban the trade of seal products, with the United States banning the trade of sealskin in 1972 through the Marine Mammal Protection Act, and subsequently with the European Union (EU) banning products derived from pups of 'whitecoat' harp seals and hooded seals in 1983 and further expanding restrictions to all seal products in 2009 (Routledge, 2018; GN, n.d.b; Hossain, 2013). Each of these trade bans collapsed the market for sealskins and prevented Inuit from earning a livelihood from selling sealskins. This economic loss undermined the ability for Inuit to participate in the global economy and imposed hardships across Inuit Nunangat (the collective Inuit homelands in Canada) (Lennon, 2010).

Since the seal trade bans, federal and territorial governments in Canada have been focused on rebuilding the international market for Nunavut sealskins. A large part of these efforts has been centred around working with the EU to allow Inuit seal products entry into EU markets, in addition to increasing public awareness on how sealing is carried out in Nunavut. In 2015, the Government of Nunavut became an Attestation Body under the EU Indigenous Communities Exemption (EU Exemption), which enables the Government to certify Nunavut seal products for export into EU markets. However, the EU Exemption requires full traceability for seal products entering EU markets. To assist Indigenous communities in meeting these traceability requirements, the Department of Fisheries and Oceans (DFO) established the Certification and Market Access Program for Seals (CMAPS) in 2015, which allocated \$5.7 million CAD in funding to create certification and tracking systems for Inuit seal products in EU markets and support marketing activities in the broader seal industry (DFO, 2017). Since the 2009 ban, the local market for sealskins within Nunavut has strengthened; however, international markets, which were the focus of government interventions, have yet to recover.

Despite efforts to rebuild the international market for Nunavut seal products, the trade of Nunavut sealskin products internationally remains a significantly small proportion of the market. From 2016-2018, the Government

of Nunavut exported 572 Nunavut sealskins to the EU through the EU Exemption, which accounted for 12 percent of the total number of sealskins that were purchased from hunters through the Government of Nunavut's seal programs over the same period (GN, 2019). These market trends have raised questions over the extent to which efforts to assist the Nunavut seal market, such as CMAPS, have benefitted Inuit (Farquhar, 2020). Furthermore, other policies and programs related to the Nunavut seal market have largely focused on rebuilding the international market, despite little evidence that such efforts have resulted in increased trade or benefit to Inuit involved in the seal market across Nunavut (DFO, 2019). While the impacts of market collapse from seal trade bans and anti-sealing campaigns on Inuit have been well documented (Hennig, 2018; Routledge, 2018; Dauvergne and Neville, 2011; Lennon, 2010), there has been less focus into how the local value chain in Nunavut functions and is affected by various market development policies at federal and territorial scales. As such, an analysis of how government policies and programmes related to the seal market are meeting the needs of Nunavummiut can provide insights into how approaches to market development can better support Nunavut Inuit priorities and self-determination. To that end, this study uses input from focus group discussions and ethnographic observations from community workshops and government meetings to map the local value chain for Nunavut sealskins and explore perspectives of local value chain actors. This study also focuses on how government policies and programmes are meeting or could better meet the needs of Inuit involved in the seal market.

Nunavut Seal Market

There have been several key events that have affected the Nunavut seal market over the past century. Table 1 provides a timeline of key events, and these are elaborated upon below.

Seal hunting has sustained Inuit for millennia, where highly nutritious seal meat remains an important country food in a traditional diet, sealskins are made into garments and footwear, and oil is used to light *qulliqs* (traditional oil lamps). Beyond these physical benefits, seal hunting is an important cultural activity for passing on Inuit way of knowing through generations, referred to as Inuit Qaujimajatuqangit (IQ). In addition to the social and cultural importance of sealing, Inuit also participate in the commercial market for seal products. Since Inuit began participating in the commercial seal market, seal harvesting has remained a vital component of the informal and formal economy in Nunavut, where sealskins are sold to Conservation officers and taken to international markets (Peter et al., 2002). In many cases, income derived from the sale of sealskins is used to offset the costs associated with harvesting (equipment and snowmobile repairs, etc.). Inuit commonly hunt ringed seals; however, harp seal is also periodically harvested in some communities, particularly

TABLE 1. Timeline of important events in the Nunavut seal market.

Year	Event	Description	Outcome
Late 1800s	Inuit begin trading sealskins at Hudson's Bay Company posts	<ul style="list-style-type: none"> Inuit began participating in commercial seal industry Sealskins became an important source of income Dependent trading relationship during time of centralization and immense social change 	Inuit sealskins enter commercial market
Pre-1990s	Government of Northwest Territories establishes the Fur Assessment and Advance Program	<ul style="list-style-type: none"> Harvesters sell dried long furs (i.e., fox, wolverine, bears, wolf, etc.) to Territorial government facilitates sealskin Conservation Officer and receive a one-time advance payment based on size and quality Furs are sold at auction into international markets with additional proceeds directed back to the harvester 	
1960s	Animal activist groups launch anti-sealing campaigns focused on the Canadian seal industry	<ul style="list-style-type: none"> Shifting societal values away from animal fur, particularly sealskins 	Reduced demand for seal products
1983	EU trade ban on whitecoat seal products	<ul style="list-style-type: none"> Council Directive 83/129/EEC banned the import of whitecoat harp seal pups 	Market collapse
1988	Price and sale of sealskins in Nunavut drops	<ul style="list-style-type: none"> Number of sealskins sent to market drops from 48,000 in the late 1970s to less than 1000 by 1988 (Reeves, 1998) 	Market collapse
Mid-1990s	Resurgence in seal market	<ul style="list-style-type: none"> Renewed demand in fur and sealskin resulted in higher prices and more Nunavut sealskins entering the commercial market 	Price increase
2002	Sealskin Purchase Program established to support Nunavut seal market	<ul style="list-style-type: none"> One-time cash advance payment is provided to harvesters who sell their sealskins to the Government of Nunavut (GN, 2017) 	Financial Support
2006	Dressed Sealskin for Nunavummiut Program established to support Nunavut seal market	<ul style="list-style-type: none"> Government of Nunavut professionally dresses and/or dyes sealskins for sale to Nunavummiut at cost price to promote equal and easy access to Nunavut sealskins. 	Promote value-added sealskin products
2009	EU trade ban on seal products	<ul style="list-style-type: none"> Regulation (EC) No 1007/2009 adopted by the European Parliament and the Council, banning the trade of seal products in the EU (EC, 2019) 	Market collapse
2015	Government of Nunavut becomes an Attestation Body under the EU Indigenous Exemption	<ul style="list-style-type: none"> The EU formally approves the Government of Nunavut as a Recognized Body under the Indigenous Exemption The Government of Nunavut can certify sealskins harvested in accordance with rules of the exemption for export into EU markets 	Market access
2015	Department of Fisheries and Oceans (DFO) establishes the Certification and Market Access Program for Seals (CMAPS) program	<ul style="list-style-type: none"> CMAPS established as a \$5.7 million, five-year program to fund the development of certification and tracking systems of Indigenous seal products for export into EU markets 	Market access support

in Pangnirtung and Grise Fiord. Bearded seal is also occasionally harvested but does not substantially contribute to the commercial market. The species of seal hunted across Nunavut varies based on community preferences for different sized and aged seals and the time of year. Overall, the long-standing and multi-faceted importance of seals in Inuit society promotes the sustainable, traditional, and contemporary economy of Nunavut.

Shifting societal values away from animal fur and the emergence of anti-sealing campaigns targeting the Canadian seal industry had a significant impact on the Nunavut seal market from the 1960s onwards. In the 1960s and 1970s, animal activist groups, such as Greenpeace and the International Fund for Animal Welfare, began protesting the commercial seal hunt in Newfoundland. The emergence of anti-sealing campaigns saw images of whitecoat seal pups being clubbed to death distributed across popular media outlets, which were influential in shaping the social construction of the seal and its plight as the victim of an inhumane slaughter (Guevara et al., 2008). High publicity events, such as the 1977 Paris Match cover featuring French actress Brigitte Bardot cuddling a whitecoat, or the famous front-page photo of a whitecoat being clubbed to death in the British newspaper, *The Mirror*, spread the message of anti-sealing campaigns across Europe and North America (Dauvergne and Neville, 2011; Fitzgerald, 2011). Such approaches mobilized members of the public, with over three million letters and postcards being written to members of the European Parliament calling for a ban on the import of whitecoats (Dauvergne and Neville, 2011). This lobbying was successful and eventually resulted in numerous international bans on seal products.

Even though the 1983 EU ban targeted only one type of sealskin and included an Indigenous Communities Exemption, anti-sealing campaigns had ruined the reputation for all sealskin types and ultimately collapsed the market. This market collapse undermined the Inuit economy and imposed hardships on communities across Inuit Nunangat (Lennon, 2010). At a time when Inuit were already living with the legacies of colonialism, the international market collapse for seal products exacerbated socioeconomic conditions across the region. Prior to the 1983 ban, many Inuit were able to make a living from selling sealskins that enabled them to continue living out on the land. Once the 1983 EU ban collapsed the market for sealskins, Inuit could no longer sell sealskins and were left with few other options than moving into centralized communities, where they were pushed further into the wage economy and increased reliance on social assistance as cultural links to the land-based economy began to erode (Routledge, 2018). Sealskin prices remained low in the years following the 1983 EU ban until a resurgence in fur demand resulted in the price of a sealskin averaging \$70 CAD and reaching up to \$92 CAD in 2004 (FHA, 2004). However, this resurgence was temporary, with the subsequent 2009 EU ban resulting in average sealskin prices falling to \$23 CAD in 2010, marking a 67 percent price reduction (FHA, 2010).

Government of Nunavut

Following the signing of the Nunavut Land Claim Agreement (Nunavut Agreement) in 1993, the Government of Nunavut was established on April 1, 1999, when the Northwest Territories was divided in two through the creation of the territory of Nunavut. As a public government in an Inuit majority population, the Government of Nunavut represents all residents in the territory, who are referred to as Nunavummiut. However, the Nunavut Agreement did set out Inuit-specific stipulations for the Government of Nunavut to implement, including Inuit participation in government (Article 23) and procurement of good and services to Inuit-owned companies (Article 24). The Nunavut Agreement also established other organizations that are responsible for coordinating and managing Inuit responsibilities and benefits. These organizations include Nunavut Tunngavik Incorporated (NTI), which represents all Nunavut Inuit, three regional Inuit organizations (Kitikmeot, Kivalliq, and Qikiqtani), and a Hunters and Trappers Organization (HTO) in each community, among others (GC, 1993). As such, Government of Nunavut policies and programs are developed for all Nunavummiut but maintain IQ as the starting point for all market development approaches with respect to seals and sealing.

The Government of Nunavut has an active role in managing the sealskin market. Prior to 2020, the sealskin file was managed through the Department of Environment (DoE), with specific programs administered through the Wildlife Management Division and Fisheries and Sealing Division. However, with the Fisheries and Sealing Division transitioning to the Department of Economic Development and Transportation (EDT) in 2020, policies related to the sealskin market are now under the regulatory authority of both the DoE and EDT (Figure 1). One of the key seal product management tools the DoE and EDT use is the Seal and Fur Programs Policy. The goal of this policy is to “provide financial support for projects related to seals, sealing, fur, and access to fair-priced Nunavut harvested commercially tanned sealskins to Nunavummiut. These programs intend to support Nunavut’s sealing and fur economies, including crafters and designers” (GN, 2017).

A number of programs operate from this policy, including the Fur Assessment and Advance Program, the Sealskin Purchase Program, and the Dressed Sealskins for Nunavummiut Program (Figure 1). Such programs have a long history in supporting the fur trade across the Canadian Arctic and remain an important tool for supporting the sealskin market in Nunavut. These programs all function to support traditional harvesting practices for Inuit and participation in the cash economy through the trade of fur and sealskins.

The Sealskin Purchase Program is the medium through which the basic seal value chain is managed and is operated through the Wildlife Management Division (Figure 1). Through this program, the Government of Nunavut is heavily involved in the sealskin commodity industry,

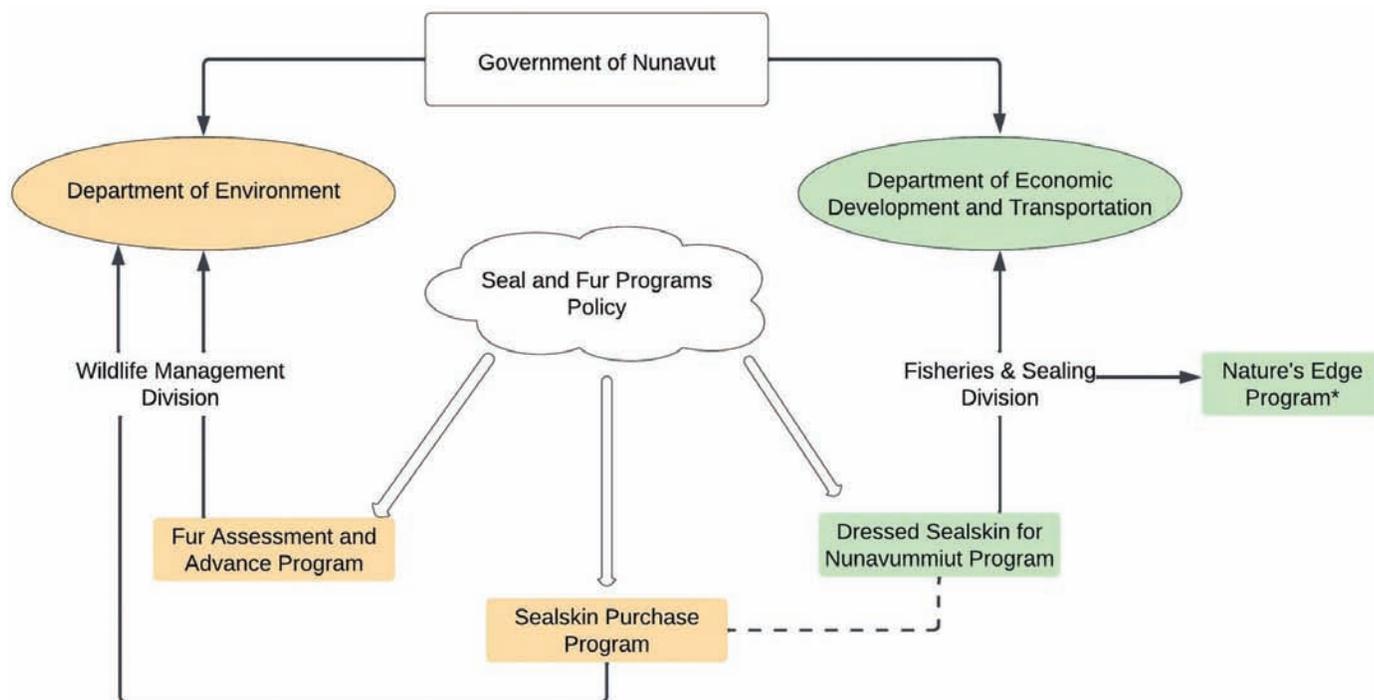


FIG. 1. Policies and programs relevant to the seal market in Nunavut and their respective governing authority under the Government of Nunavut. Orange shapes indicate programs that operate through the Department of Environment; Green shapes indicate programs that operate through the Department of Economic Development and Transportation. Dotted line indicates the connection between the Sealskin Purchase Program and the Dressed Sealskins for Nunavummiut Program. *Nature's Edge Program is no longer in existence.

which in addition to the Northwest Territories, is the only jurisdiction in Canada where hunters and trappers are supported in this manner. In other regions, government intervention occurs through a crown corporation, where trappers are responsible for getting their furs to market. As a result, the Government of Nunavut's role in supporting the seal market presents a unique example of a combined public and private value chain.

The DoE operates the Sealskin Purchase Program to recognize the particular importance of sealing to community food security and the traditional economy. The Program was established in 2002 in the wake of market collapses for sealskin products, where sealskins are purchased directly from harvesters instead of providing a one-time advance payment as in the Fur Assessment and Advance Program (GN, 2010). This one-time payment model is aimed at protecting harvesters from fluctuations in external markets. Upon sale, the Conservation Officer inputs information into the Fur Tracking System, which is the computerized data management system that tracks all payments, export certificates, shipments, and harvester information that goes through the Sealskin Purchase Program. Upon sale, the sealskin becomes the property of the DoE and sealskins are shipped to a processing facility in Southern Canada for professional dressing, at which point they enter the Dressed Sealskins for Nunavummiut Program (GN, 2017). Once sealskins are shipped to a processing facility, they become the property of the Fisheries and Sealing Division through the Dressed Sealskins for Nunavummiut Program. Upon professional

dressing, which includes tanning and/or dying, sealskins are shipped back to the Fisheries and Sealing Division and sold to Nunavummiut at cost price in an effort to encourage the use of Nunavut sealskins for the value-added sealskin industry (GN, 2017). While the Sealskin Purchase Program and the Dressed Sealskins for Nunavummiut Program are two distinct programs, they operate in tandem with each other as the Sealskin Purchase Program receives sealskins from harvesters while the Dressed Sealskins for Nunavummiut Program sells those same sealskins back to Nunavummiut.

Among the 20 communities that participated in the Sealskin Purchase Program from 2010-2018, the average annual number of sealskins purchased from harvesters into the Sealskin Purchase Program was nearly 4000. This number varies greatly between communities, with some communities selling as few as 1 annual sealskin while other communities sold more than 5500 annual sealskins over the same period. The professional tanning process does not result in any significant loss of sealskins; and consequently, there were a comparable number of sealskins sold at cost to Nunavummiut through the Dressed Sealskins for Nunavummiut Program (GN, 2018). These numbers have not significantly changed since 2018. The Department donates five percent of the total number of sealskins per fiscal year with a priority on donating sealskins to not-for-profit organizations whose activities will have a positive and demonstrable impact on Nunavut's sealing industry. Currently, dressed sealskins are sold through the Dressed Sealskins for Nunavummiut Program via five distributors

TABLE 2. Overview of focus group participants and the topics discussed.

Technique	Actors	Number of Participants	Topic
Focus group discussion	Harvesters	8	A. Role in seal market
	Processors and artisans	12	B. Challenges and opportunities in working with, selling, or sourcing sealskins
	Artists and retailers	6	C. Thoughts and perspectives on government programs and policies
			D. Thoughts and perspectives on strategies and tools to support the seal market

that are subsidiaries of the Nunavut Development Corporation. These distributors are in Iqaluit, Taloyoak, Rankin Inlet, Arviat, and Pangnirtung. While distribution partners are in place to encourage Nunavummiut access to sealskins across the territory, it has been recognized that this distribution has not been equal amongst Nunavut Inuit.

The Fisheries and Sealing Division is largely responsible for managing the sealing sector across the territory, as well as representing Nunavut's sealing interests on international, national, provincial, and territorial levels (GN, n.d.b). As such, the Division is involved in several efforts to revitalize the Nunavut seal market. In response to market pressures on seal products, the Fisheries and Sealing Division has expended numerous resources into creating a marketing strategy that promotes the cultural, social, and economic significance of seal harvesting. A number of educational materials were developed, along with the creation of a Nature's Edge Program, which included an educational booklet, a Nunavut Sealing website, and a branding logo that identifies Nunavut sealskin products for sale in local and external markets (GN, n.d.b). The Nature's Edge logo emphasizes that the Nunavut seal hunt is humane and part of a subsistence economy to support sustainable Indigenous livelihoods. The Nature's Edge Program was a temporary government initiative that is no longer active.

Despite the longstanding territorial assistance for seals and sealing, Nunavut Inuit still face challenges in adequately benefiting from the market. As such, this study explores local perspectives in the Nunavut seal market regarding efforts taken by federal and territorial governments to rebuild the international market for seal products and how associated policies and programs are meeting the needs of Nunavut Inuit.

METHODOLOGY

Primary data collection for this research consisted of in-person focus group discussions with stakeholders involved in the Nunavut seal market over a nine-week period in June, July, and August 2019. Focus group discussions took place in Iqaluit, the capital city of Nunavut, and in Qikiqtarjuaq, on Broughton Island northeast of Iqaluit in the Davis Strait. Both communities are active in different aspects of the sealskin value chain. The focus groups were comprised of four topics: (A) the role of participants in the seal market, (B) challenges and opportunities in working

with, selling, or sourcing sealskins, (C) thoughts and perspectives on the effectiveness of government programs and policies and (D) thoughts and perspectives on strategies and tools to support the seal market (Table 2). The purpose of focus groups was not to establish a statistical sample across Nunavut, but rather to elicit perspectives from people directly involved in different aspects of the sealskin value chain. Focus groups were conducted with three groups of participants – seal harvesters, woman involved with preparing sealskins, and artists and retailers working with or selling sealskin. All individuals who participated in the focus group discussions were current Inuit residents of either Iqaluit or Qikiqtarjuaq. As such, the results of this study are specific to Qikiqtani Inuit and do not necessarily represent the perspectives or value chain structure of all of Nunavut. Due to the concentration of artists and retailers in Iqaluit, the focus group discussion in Iqaluit was comprised of artists and retailers, while focus group discussions in Qikiqtarjuaq were open to harvesters, processors, and artisans.

Focus group discussions are a useful method for eliciting a multiplicity of views within a group setting and are particularly beneficial in inductive approaches to research, where the researcher has an open-ended set of questions but encourages participants to direct the discussion by exploring the issues of importance to them (Gibbs, 1997; Kitzinger, 1995). Due to the inductive nature of this research, focus group discussions were chosen as the data collection method to produce greater community-driven responses than individual semi-structured interviews. A focus group script was developed for each set of value chain actors; however, the focus group discussions were informal in nature and largely directed by participant interests.

For each focus group discussion, all members of each group were invited to take part in the event. Events were advertised (in English and Inuktitut) on Iqaluit's Facebook news group, on community posting boards, and on the local radio station in Qikiqtarjuaq. The discussions took place at the Elder's Qammaq in Iqaluit and the Council Chambers in Qikiqtarjuaq. Focus group discussions were conducted in English, by the researcher directly, or Inuktitut, with the assistance of an Inuktitut interpreter. Immediately following each focus group discussion, audio recordings were transcribed, and a content analysis was performed (Fig. 2). Important responses and sample statements relevant to the research question were coded. Once codes were grouped together into categories, a list of keywords

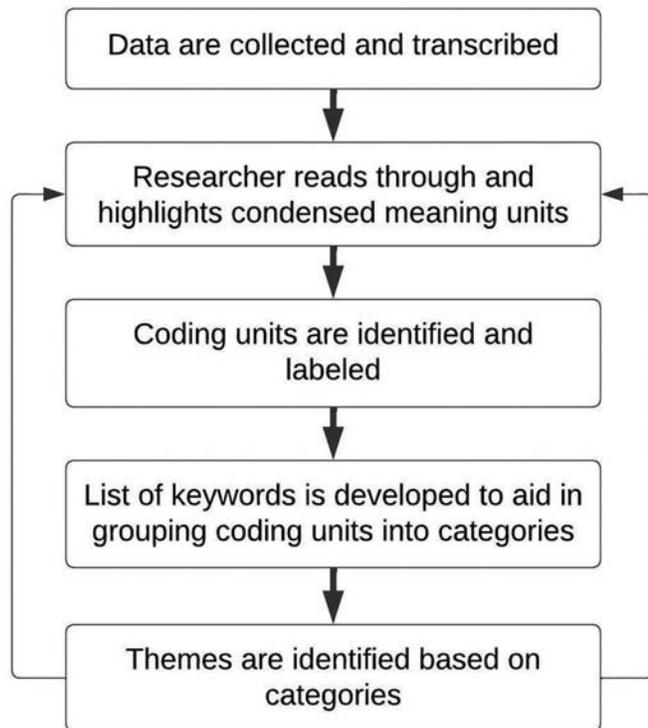


FIG. 2. Overview of qualitative content analysis as performed with results of focus group discussions.

was developed to ensure rigor and replicability. Preliminary findings were shared with participants for questions, comments, or concerns, which were then incorporated into the findings.

Quotations are shared throughout the results to supplement the content analysis and convey the knowledge shared by respondents in their own words. However, the authors do acknowledge that culture is captured in language, which may result in a different interpretation or loss of meaning in some quotations that were translated from Inuktitut to English.

Ethics approval to conduct this research was obtained from both Dalhousie University and the Nunavut Research Institute. This research is positioned under the umbrella of current efforts being taken by the Government of Nunavut's Fisheries and Sealing Division to improve policies and programs to better support Nunavut sealing and seal products. Throughout this research, the Fisheries and Sealing Division has provided direction and guidance towards the production of meaningful and respectful research.

In addition to the focus group discussions, reviews of public records and internal Government of Nunavut documents were conducted to gain a comprehensive understanding of the existing value chain for sealskins and the specific details of government policies and programs. Public records included the Nunavut Sealing Strategy (GN, 2010), while internal documents included internal technical government reports, FTS data, meeting minutes, letters, and various sealing educational materials created by the Fisheries and Sealing Division.

RESULTS

Focus group discussions with harvesters, women involved with preparing sealskins, and artists and retailers working with or selling sealskin allowed for a better understanding of how government programs and policies are meeting the needs of Inuit harvesters, processors, and artists.

Three key themes emerged from the focus group discussions: (A) quality and provenance trade-offs in sourcing sealskins, (B) values and drivers in the Nunavut seal market, and (C) the potential role of marketing strategies and tools. An additional result from the focus groups was the sharing of a detailed account of the Nunavut sealskin value chain, which is summarized to provide important information in understanding the subsequent results (Fig. 3). The sealskin value chain in Nunavut is in part managed through the Sealskin Purchase Program and the Dressed Sealskin for Nunavummiut Program. However, focus group discussions with Inuit involved in the seal market revealed that various barriers, bottlenecks, and challenges exist as a sealskin moves from an Inuk harvester to its eventual point of sale. Sealskins enter the value chain through one of two streams: the Artisanal Stream (orange nodes), which includes sealskins that are prepared and used within the community or sold within the territory, and the Government Managed Stream (blue nodes), referring to the sealskins that are tanned and dyed for sale in local and external markets as facilitated by the Wildlife Management Division and Fisheries and Sealing Division (Fig. 3).

Quality and Provenance Trade-Offs in Sourcing Sealskins

Respondents emphasized that quality and the origin (or provenance) of seal products were the most important characteristics to maintain in the preparation of a sealskin. Several respondents explained the multiple steps that go into preparing a sealskin to ensure quality. Once a harvester has killed and skinned a seal, it is usually given to a woman in the community to begin the process of preparation. Harvesters who don't prepare sealskins themselves or have anyone to prepare sealskins for them will typically give it to other women in the community, sometimes for free or at a cost of about \$30 CAD. A sharp ulu is used to remove the blubber and membrane, then the skin is washed with laundry soap. Once the flipper cut-outs have been sewn, the sealskin is stretched out onto a drying frame and left outside to dry for 2-3 days, depending on weather conditions. This is the point at which a dried sealskin can be sold to a Conservation Officer and enter the Sealskin Purchase Program. Sealskins that are not sold to Conservation Officers are then typically either stored or softened for personal use. Many women emphasized the immense care that is taken during this process to ensure a high-quality sealskin. For example, one respondent described how she soaks her skins overnight to prevent any blood or oil residues from remaining on dried sealskins, a

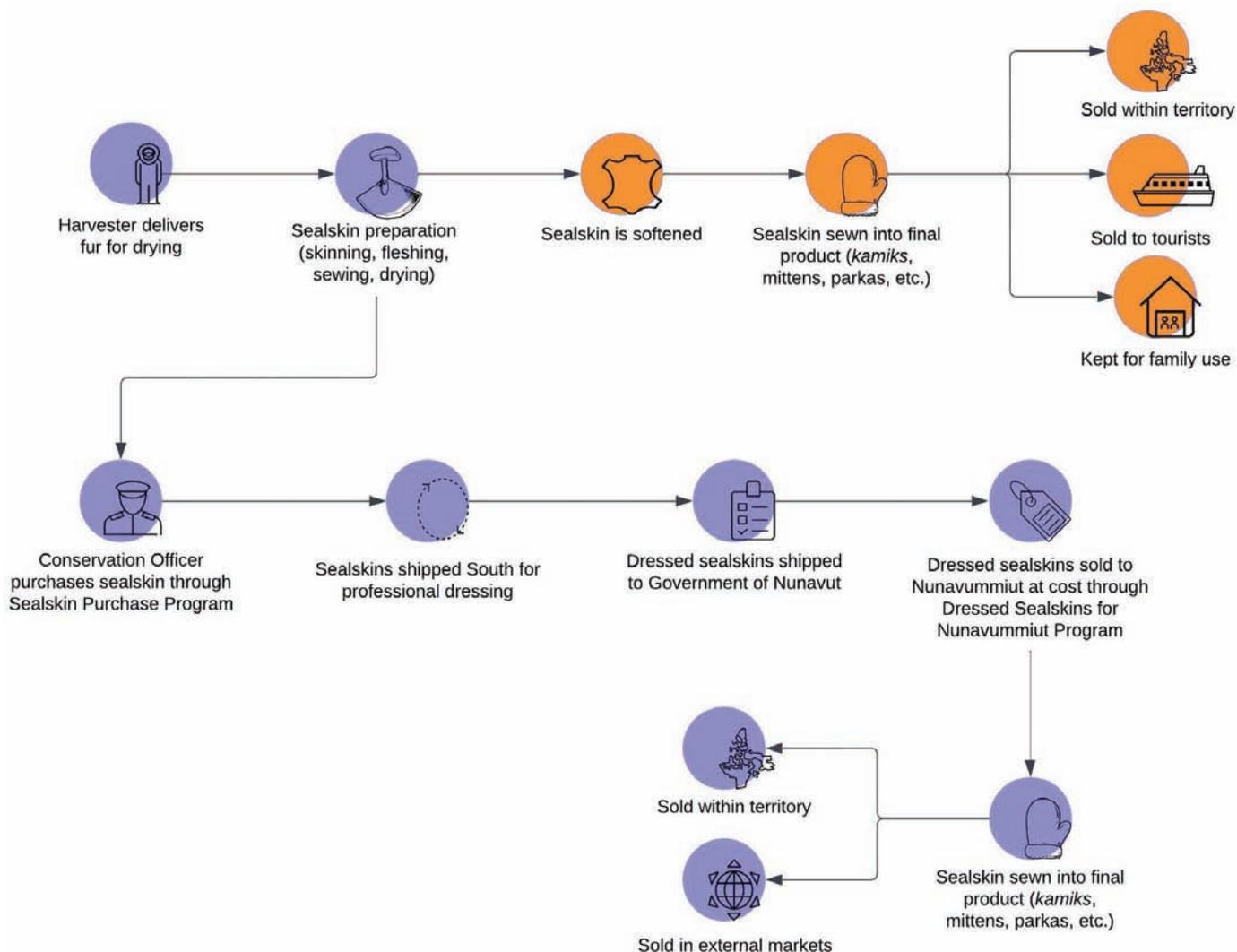


FIG. 3. Value chain of the Nunavut sealskin market showing all the activities that are performed to harvest, process, market, and distribute seal products. This value chain only applies to ringed and harp sealskins that are harvested in Nunavut. Blue nodes indicate the Government Managed Stream while orange nodes indicate the Artisanal Stream.

common sign of inadequate cleaning. While most sealskins are prepared with fur on one side, several respondents emphasized there are different ways to prepare sealskins to accommodate different uses. To prepare a *naluaq* (white sealskin) with no fur, the skin is soaked in hot water before scraping off the fur and drying the skin outside for over a month. Black sealskins with no fur are prepared similarly; however, they are not soaked in hot water. Both no fur variations are useful for making *kamiks* (traditional boots).

Several respondents conveyed that upon drying, the highest quality sealskins are picked out and kept for personal use, and most of the remaining sealskins of lower quality are sold to the Conservation Officer (through the Sealskin Purchase Program; Fig. 1; Fig. 3). However, several respondents indicated that the Conservation Officer is not always available to purchase sealskins. For example, when the position is vacant, community members must wait to sell their sealskins until a Conservation Officer comes from another community. This results in community

members having to stockpile their sealskins and prevents a timely payment, something not everyone can afford if they are in more immediate need of income. Many respondents also sell sealskins to other communities, particularly to other women involved in teaching *kamik*-making. Many women believed Qikiqtarjuaq sealskins are in high demand due to their good reputation for high quality sealskins with a nice black and silver colour that are particularly useful for *kamik*-making. Just as the nicest sealskins are kept for personal use, higher-quality skins are also prioritized when selling to other communities. While the process of preparing a dried sealskin typically takes about two weeks; it takes much longer to sew a value-added product, such as parkas, mittens, or *kamiks*. These value-added products are typically sold on Facebook within Nunavut or kept for personal use. Several factors influence where sealskins are sold, such as the most efficient sale, if the Conservation Officer is in town, if ladies in other communities are looking for sealskins, and the number of available sealskins.

Harvesters and preparers shared that young (three to four months) seals are the main targets of hunting due to their desirable meat and softer skin that is easier to work with. Ringed seals are the most common species hunted in the Qikiqtani region; however, some bearded seals are also hunted, and their skin is used for the waterproof soles of *kamiks*. Harp seals are not as commonly hunted due to differences in meat and thickness of skin that are deemed harder to work with. Through discussion of sealskin preferences, multiple comments emerged about the importance of quality and the stark differences in quality between naturally processed and professionally tanned and dyed sealskins. In Qikiqtarjuaq, many respondents prepare various sealskin products with their own sealskins that have been hunted in their community; however, some also commented on their experiences working with professionally processed sealskins. Several respondents described how the chemicals used in professional processing reduce the quality and result in a heavy, rigid sealskin, with one artisan stating, “Cleaned by government, I don’t prefer to wear them because they’re not too warm” (Qikiqtarjuaq artisan, 2019). These sealskins must be stretched out before they are sewn since it is important for sealskins to be as thin as possible without removing the fur. One woman commented that she made her husband a parka with professionally tanned sealskins; however, due to its uneven thickness, he cannot wear it out on the land hunting because it is not warm enough. Despite this, respondents stated that while professionally processed sealskins are not useful for warm clothing, they are still used for more decorative products, such as purses, wallets, and earrings.

Discussions of quality were raised in the focus group discussions with artisans and retailers. Respondents agreed that the professionally processed sealskins sourced through the Dressed Sealskins for Nunavummiut Program are of low quality. Government sealskins were referred to as “horrible” and “very thick, clumsy, not classy”, as well as having reduced durability and repellency compared to naturally processed sealskins. Artisans also commented on the high availability of coloured versus naturally tanned sealskins and suggested that sealskins may be professionally dyed to mask the low quality. The low quality of Nunavut sealskins that get sold through the Dressed Sealskins for Nunavummiut Program results in many artisans facing a trade-off between supporting the local economy by working with low quality Nunavut sealskins or sourcing sealskins from outside the territory, namely Newfoundland or Greenland. In this way, quality and provenance trade off against each other.

One respondent recalled a time when they used to think that harp and ringed sealskin process differently based on interspecies differences; however, over the years have found that ringed sealskins can be of the same quality as harp sealskins, depending on how they are processed. All respondents agreed it would be people’s preference to support Nunavut sealskins if the quality was higher;

however, some people do not have the luxury to risk reducing their profit by working with low quality sealskins. Artisans take great pride in their products and some stated that they don’t want to put their name on a product that is not of a high quality. For other artisans, supporting the local economy is an important factor when deciding where to source sealskins, with one respondent stating:

I’m the daughter of a hunter, all day long hunter, so I couldn’t imagine not using Nunavut skins. I think that would be very insulting to my father and his relatives, so I try my best to use Nunavut skins. [But] yes, there’s a huge difference in quality of the way [government managed skins] are processed.

Iqaluit artist, 2019

The important of understanding the provenance of sealskins was also highlighted:

Part of the social understanding is that I don’t think that everyone understands that there is a difference between Nunavut skins and other placed skins. Because to me, people are like “Oh, sealskin, we’re promoting sealskin, yay sealskin”, but not all sealskins were hunted by a hunter. So that’s the difference about Nunavut skins, that they’re hunted by a hunter. So that to me is the social consciousness that I carry, because to me, they’re my neighbours, they’re my relatives, and why would I want to try and have an economy that I take out when I can support my own community.

Iqaluit artist, 2019

When asked about where artisans sell their products, every respondent selling their value-added products commented on the importance of Facebook in their business. Sales through Facebook generally occur within Nunavut, with some items shipped elsewhere in Canada and few products shipped internationally. The Fisheries and Sealing Division has supported Nunavummiut artisans to travel to the EU to raise awareness and sell their products. In these cases, respondents recalled marking up prices by 30-40 percent for value-added products (jewellery, parkas, mittens, etc.)

Several respondents agreed that they typically receive \$60 CAD to \$75 CAD per sealskin when selling to the Conservation Officer; however, these prices have increased since 2019 with harvesters now receiving \$80 CAD to \$100 CAD per sealskin. Similarly, prices are not marked up when selling to other communities. However, value-added products offer a much higher price than a dried sealskin. One respondent described a time when they traveled to Northern Quebec for a music festival with 11 *kamiks* and received enough money to purchase a snow machine. This same respondent also recalled a time when they received \$1500 CAD for a pair of *kamiks*.

Values and Drivers in Nunavut Seal Market

Throughout focus group discussions, respondents continually stressed that hunting seals and working with sealskin is integral to Inuit culture. Respondents described the numerous economic, social, and cultural contributions of sealing to their lives. Harvesters emphasized that they hunt all year round and that many harvesters are men; however, women also hunt, and in many cases hunting occurs together as a family. Several respondents also described the importance of engaging youth in hunting and working with sealskin. One respondent recalled how youth engagement has changed through their lifetime, with children having less access to traditional hunting practices than in the past. For youth that do not have access to a boat to go out on the land, participants suggested there is more available time in the community to get into trouble. Respondents highlighted the importance of teaching youth how to hunt seals, with one harvester sharing:

I think we should teach our young people how to hunt seals properly. For example, during the wintertime, you have to stand up beside the igloo, have to know the wind, the direction it's coming from. If you're on the other side, they can smell you. I think we have to teach our young people how to hunt seals nowadays.

Qikiqtarjuaq harvester, 2019

Seal meat was repeatedly identified as an important country food for local consumption. Several respondents emphasized that while working with and selling sealskins is important, seal meat is part of a traditional diet and important for food security. As one harvester described, "It's not only the market, it's our number one diet" (Qikiqtarjuaq harvester, 2019). Food sharing is still strong and commonplace, where community members are invited through the local radio to join with others to enjoy fresh seal meat. One respondent observed that some people prefer to solely eat country food but elders are increasingly eating processed foods due to the unaffordability of gas and bullets for hunting. The income from selling sealskins can help to augment hunting costs, but as stated above, delays in getting paid through some government programs can be a hindrance. In some cases, other than social assistance, profit from selling sealskin products is the only source of income for artists and designers. In addition to feeding their family, the income from selling sealskin products allows people to stay at home and care for their children or grandchildren. For these reasons, respondents in Qikiqtarjuaq agreed that the [Sealskin Purchase Program] is very helpful in providing income to community members who sell their sealskins to Conservation Officers.

Discussions about the seal market also touched on elements of Nunavut sealing that are important to Inuit. When seal hunting, harvesters described that they only catch what they need, usually one or two seals at a time:

We only catch what we need. like one or two seals at a time... We prefer to catch what we want, what size and what kind, we don't just kill, we have respect. That's how we were raised, not to just kill animals.

Qikiqtarjuaq harvester, 2019

Seals are targeted for desired size and kind, and in many cases young and fat seals are the best for sealskins and meat quality. Several respondents also described how the whole animal is used for various purposes. The eyes, brain, liver, ears, and hands are all eaten, sealskins are used for clothing, and bones are either used for games or jewelry. Respondents indicated that another important element of the seal harvest that sets Nunavut sealskins apart from other placed skins is the strong support it provides to Inuk hunters, who are integral to Inuit society. Connections between family, friends, and the broader community result in a great pride for supporting the Nunavut seal hunt and market. One artisan emphasized the importance of sharing this pride with people, that seals are celebrated, and harvesters are revered:

Part of [the focus] for me as an Inuk, is just building that pride on people. Because when a community is happy, when a community has that pride, we can support each other... we don't always need to export things.

Iqaluit artist, 2019

The balance between exporting goods and keeping them within the territory was also shared by another respondent:

My husband grew up in Cape Dorset seeing art being exported. Art was not to stay in the community, art was to make a livelihood to be able to feed your homes. And so, for art to actually stay in our community, and that there are some people starting to have that comfort to be able to keep art in their family, in their homes, is like, kind of amazing.

Iqaluit retailer, 2019

Marketing Strategies and Tools

Value chain actors shared their insights into the current state of the seal market, as well as their thoughts and perspectives on the suitability of marketing strategies and tools that are the focus of government programs and policies. In Iqaluit, one respondent observed that many Nunavummiut are not aware of the Government of Nunavut's programs, making it more difficult for artisans to market their product when they're not even aware of the options. Respondents agreed it is the responsibility of the Government of Nunavut to communicate their programs and initiatives. The importance of local capacity building and better awareness of government programs was highlighted, with one Inuit participant stating in 2019, "How can I market if I don't even know these programs

exist? So, I'm just going to market in my town, or the next town. As another artist highlighted, "The way I see it [in] Nunavut, capacity needs to start here... so people are more aware of the processes and requirements to get to something like [a certification system]."

In Qikiqtarjuaq, no respondents were familiar with the Nature's Edge Program or the Dressed Sealskin for Nunavummiut Program (Fig. 1). Harvesters, processors, and artisans in Qikiqtarjuaq were also generally unaware of what happens to sealskins once they are sold to the Conservation Officer. However, they were interested to learn more and expressed that harvesters may benefit from learning more about the process by which sealskins are shipped for professional tanning, with one Qikiqtarjuaq processor suggesting in 2019, "Maybe it would help the hunters more if they know what [the government] is doing with the sealskin."

While artisans recalled having positive sales experiences in Norway, all respondents agreed that demand for Nunavut sealskins in EU markets is low. Despite the Fisheries and Sealing Division's attempts to rebuild the EU market and have Nunavummiut artisans establish online profiles and shops, some respondents are hesitant to invest in these markets when the return on investment may not be worth it. Similarly, respondents in both Iqaluit and Qikiqtarjuaq agreed that tourists to the region do not buy sealskin products. One respondent observed that at a gift shop in Iqaluit, the turnover rate of other animal products, such as ivory and baleen, is much higher than sealskin, despite many of these products having similar trade restrictions as seal. While the local demand for sealskin products is high, the respondent described this discrepancy as very apparent among tourists. Numerous comments about the state of the export market came up during discussions surrounding American and EU cruise ship tourists not purchasing sealskin products, with one respondent describing, "Most of the tourists, when they come here by ship, sometimes they can't even buy the seal products. When they're Americans or Europeans, they can't buy seal products" (Qikiqtarjuaq artisan, 2019).

Respondents shared their perspectives on the history of anti-sealing campaigns and subsequent trade bans on sealskin products, with one processor sharing, "The [European] government, back in the 70s, only heard from Greenpeace [and] animal rights groups, and they didn't hear from us, so they voted in favour of animal rights groups" (Qikiqtarjuaq processor, 2019). The lasting impacts of these anti-sealing campaigns and market collapses was also highlighted, with a few respondents describing how it is not uncommon for Facebook ads selling sealskin products to get blocked and removed. Respondents that were old enough to recall the seal market prior to the 1983 EU ban commented on how they used to receive, on average, \$400 CAD (the equivalent of \$1400 CAD in 2022) from selling sealskins to the Conservation Officer.

Respondent's reactions were mixed when prompted about the potential role of marketing strategies in

supporting the seal market. All respondents in Qikiqtarjuaq agreed that they would like to receive a higher price from the Conservation Officer to account for all the hard work and time that goes into preparing a dried sealskin for sale:

I would be more happy for people that go hunting if the skins go a little bit higher. Because everything they use, like bullets, gas, ski-doo parts when they break down, and food, they're pretty expensive up here. The money is kind of tight... I wouldn't mind seeing the skins go up higher.

Qikiqtarjuaq harvester, 2019

Others also agreed that they would like to see a tag on sealskins showing the community of origin, with one artisan stating, "I would love to see our skin with a tag, knowing that people from around will know it's coming from our community. I would love to see that, really really love to see that" (Qikiqtarjuaq artisan, 2019).

In Iqaluit, where respondents were more familiar with existing branding tags, such as Authentic Nunavut and the Igloo Tag, many thoughts and perspectives were discussed. The Igloo Tag Trademark was created in 1958 and has become an internationally recognized symbol for authentic Inuit art (IAF, n.d.). Similarly, the Authentic Nunavut logo was created as a brand for the authenticity of Nunavut arts and craft products (GN, n.d.a). A retailer who sells a wide variety of arts and crafts, including sealskin products, commented that numerous tags get confusing and lose their value due to a lack of enforcement to maintain product authenticity, citing "it's not doing what it says it is, so now you're sort of miss-marketing what is happening" (Iqaluit retailer, 2019). Others commented on the blurred cultural understanding created when market tools are not specific, as in the case of the Authentic Nunavut tag not being as specific as Inuk made. Here, respondents agreed that as long as sealskins are harvested by Inuit, they can be Authentic Nunavut, even if the products are designed and sold by non-Inuit, which confounds the notion of 'Authentic' Nunavut.

Another respondent commented that many Nunavummiut artisans don't sell their products in a retail setting and aren't exposed to the various branding tags, stating, "We have a lot of self-producing artists who don't necessarily have their products in a store. Only storefronts really know about this [Nature's Edge] tag and this authenticity (Iqaluit artist, 2019). In response to being shown existing branding tags, another artist stated:

I think definitely [branding tags] are geared for outside of our territory. Because the assumption here is that it's all sustainably caught right in our bay. We don't need those around here as much.

Iqaluit artist, 2019

Many respondents agreed on the importance of supporting education and consumer awareness regarding Nunavut sealskins, with one respondent suggesting that

tourists be encouraged to ask questions about where products come from. Respondents related this idea to building a Chain of Custody for Nunavut sealskins to let tourists know that they are supporting an Inuk harvester. This Chain of Custody idea could work for multiple products beyond sealskins and become more popular than existing tags. When asked about their thoughts on consumer-facing traceability systems, respondents stated this would be a large investment for few people interested in using it, the very conscious consumers. Rather, respondents emphasized that some problems can be addressed with the same approach; therefore, it makes sense to promote education and public awareness as a common solution to issues surrounding fake Inuit art and markets for sealskin products. One respondent argued that by promoting individual artists, you cannot fake an artist's name if there is enough public information about their work.

DISCUSSION

The focus group discussions and mapping of the value chain suggest that the focus by federal and territorial governments on rebuilding the international market for seal products has resulted in policies and programs that are not meeting the needs of local actors in various ways. These findings have identified important gaps in the local value chain that both inhibit export development opportunities and undermine the ability for Inuit to adequately benefit from the seal market. Gaps in the local value chain relate to (1) differed preferences in priority markets, (2) provenance issues due to quality differences, (3) authenticity of branding tags, and (4) limitations in the Government-managed tracking system. In this way, the current approach to market development for Nunavut sealskins appears to be prioritizing export markets over the local value chain. This investment in only one half of the market puts harvesters and artisans at the mercy of the export market and limits resilience that may be found in a more diversified set of priorities and options. Building market resilience also requires product diversification, which may require a focus on other seal products beyond sealskin.

As described by respondents, Inuit have several important connections with the seal hunt beyond selling sealskins for income. These connections have been previously well documented, where seals are an important source of country food, provide intergenerational knowledge exchange, and sustainable clothing for the Arctic climate (Athens et al., 2014; Peter et al., 2002). As such, the findings from this study affirm that Inuit hunt, eat, and wear seals for reasons outside of their economic value, despite the evident significance of the market. This is particularly important in a region with disproportionately high food costs (Tarasuk et al., 2019; Newell et al., 2020). Accordingly, these values must be at the forefront of all efforts to support the market if policies are to be effective and advance Inuit self-determination. Development and

prioritization of a domestic market will contribute to self-determination and a resilient local economy while still allowing exportation of seal products.

A lack of public awareness of government programs was a common theme among all focus group discussions. Not a single respondent in the Qikiqtarjuaq focus group discussions was aware of existing Government of Nunavut programs, such as the Nature's Edge Program or the Dressed Sealskins for Nunavummiut Program. This may largely be due to the remoteness of smaller Nunavut communities and Iqaluit being the central hub for Government of Nunavut employees. Additionally, there are no retail shops in Qikiqtarjuaq, like in other Nunavut communities, which reduces the incidences that artists and artisans outside of Iqaluit may be exposed to specific branding programs developed by the Fisheries and Sealing Division. As mentioned by artists and retailers in Iqaluit, the proliferation of branding tags is largely tailored to consumers from outside of Nunavut. These perspectives regarding branding tags relate to the lack of clear priorities for the focus of the Nunavut seal market. The 2010 Sealing Strategy for Nunavut outlines the need to focus on community collaboration and programming that meets the needs of Nunavummiut, which stands in contrast to the focus of CMAPS in developing tracking systems for Inuit seal products entering EU markets (DFO, 2017). It is not to say that both markets cannot be promoted; however, the effectiveness of market tools will be undermined if they do not reflect Inuit priorities and address issues that have been identified in the local value chain.

Through the Dressed Sealskins for Nunavummiut Program, artists and designers may purchase Nunavut sealskins at a discounted cost. This program aims to support the local economy and encourage artists and designers to work with sealskins that entered the Sealskin Purchase Program and hence are 'Nunavut' sealskins presumably hunted by an Inuk harvester. However, many respondents emphasized the poor quality of professionally processed sealskins through this program. As respondents outlined, this poor quality creates a trade-off between supporting the local economy and working with poor quality sealskins or sourcing higher quality sealskins from outside the region. While some artists prioritize working with Nunavut sealskins regardless of the quality, others end up sourcing sealskins from outside the territory, namely from Newfoundland or Greenland. The results of sourcing sealskins from outside the territory are numerous. Given that the EU Exemption enables seal products sourced through an Indigenous hunt entry into EU markets, Inuk artists working with non-Inuit sealskins are technically not eligible for the EU Exemption. Additionally, sealskins sourced from outside Nunavut are not tracked through the Fur Tracking System and therefore do not meet traceability requirements under the EU Exemption. Beyond the EU Exemption, external sourcing of sealskins may disempower Inuit from working with sealskins harvested in their territory, a matter deemed important by all focus group

respondents. As such, a focus on the distribution of high-quality Nunavut sealskins to Nunavummiut is critical for resolving provenance issues in the local value chain and building a more robust supply of sealskins that meet requirements under the EU Exemption.

Discussions with artists and retailers revealed limitations of existing branding tags on Nunavut arts and craft products, as well as opportunities for improving such marketing and branding schemes for Nunavut seal products. While the Igloo Tag is not directly used for seal products, the Igloo Tag and Authentic Nunavut tag are commonplace in many retail outlets across the territory, particularly in Iqaluit, and are therefore exposed to many tourists. However, discussions with artisans and retailers identified some limitations in these existing branding tags. A retailer selling seal products outlined that there is no enforcement or tracking system to maintain product authenticity with the Igloo Tag or Authentic Nunavut, which diminishes the value and credibility of these branding strategies. While the Fisheries and Sealing Division expended substantial resources into the creation of the Nature's Edge Program, such a program may risk building a brand for Nunavut sealskins without first finding a market to sell those products. While the Nature's Edge logo was never used on value-added products and is no longer in existence, results from the focus group discussions suggest there are diminishing returns in adding more branding tags to an already saturated marketplace with numerous and sometimes confusing labelling systems. Certification of authenticity and provenance is not simply a matter of affixing a branding tag or logo to a product. While certification is a simple concept, it is not a simple matter. The provenance of a product requires robust documentation, a well-established authority to ensure product authenticity and ownership, and commitment amongst international parties to record-keeping and enforcement. By engaging with local artisans working in the Nunavut seal market, the need for certification of provenance and ways to establish an effective certification of provenance become clear.

Results from focus group discussions revealed that large parts of the sealskin value chain are not included in the Government Managed Stream that certifies sealskins for export under the EU Exemption. For instance, seal that are hunted and prepared into a seal product in Qikiqtarjuaq do not enter the Sealskin Purchase Program or Dressed Sealskins for Nunavummiut Program, and therefore do not receive the export certificate that is required for entry into EU markets. With a growing number of cruise ship tourists traveling directly to remote Nunavut communities, such as Qikiqtarjuaq, this interaction between 'uncertified' artisan seal products and European tourists is becoming more common. Despite all respondents agreeing that cruise ship tourists, whether American or European, do not purchase sealskins products when visiting Nunavut, this lack of government administration of EU export certificates prevents any potential purchases, regardless of consumer interest. This is compounded by a lack of public awareness

of the EU Exemption by respondents and perhaps Europeans tourists themselves. This situation further demonstrates how an external focus on export markets without first resolving issues in the local value chain can undermine efforts to build the export market and limit the ability for Nunavut Inuit to benefit from the market.

Advancement of Indigenous self-determination is the foundation of the Nunavut Land Claims Agreement and an important tenet of the more recent passing of the federal United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) Act (GC, 1993; GC, 2021). Furthermore, self-determination is a key factor to consider as questions arise over the extent to which Inuit priorities and needs have been incorporated into decisions surrounding economic and social policies in Nunavut (Inutiq, 2022). This is increasingly more difficult as resource development activities have increased the non-Indigenous population of Nunavut and shifted priorities from those of traditional society to ones influenced by global economic priorities. This can be seen in the changing value of seals and marine mammals from a source of sustenance and well-being to commercial use for tourism and export promotion (Keenan et al., 2018). In keeping with the principles of UNDRIP, the direction of policy regarding the use of seals in Nunavut should be under the direction and control of Nunavut Inuit.

The findings of this study beget the question of what economic development means for Nunavut. As respondents involved in the Nunavut seal market shared, building Nunavut does not always have to result in exporting everything. Government focus has been on development of the seal export market based in part on the perception that Inuit harvested products will be accepted into the export "luxury" market. However, since the imposition of the EU bans, other products have filled the niche that fur once occupied and luxury brands now command a larger luxury market share for clothing and accessories (e.g., Louis Vuitton, Coach, Gucci & Gabbana, Chanel, etc.) (Kleibert et al., 2020; Shin, 2019). Therefore, improving the export market for seal products is not simply a matter of changing consumer perceptions about the ethics of seal products, but also displacing well established public perceptions of luxury products. This does not undermine the value in advancing the use of sustainable natural resources for traditional clothing and accessories and promoting them through the development of local markets.

Supporting the local value chain can create knock-on effects that also benefit the export market through increased quality and supply of products. However, focusing on the export market cannot adequately support the local value chain without first addressing key gaps and ensuring the needs of Nunavut Inuit and Nunavummiut involved in the market are met. As much effort that goes into developing an export development opportunity may arguably do more benefit to strengthening the local value chain in a manner that reflects Nunavut Inuit needs and priorities.

The objective of this study is not to undermine the importance of export markets in providing important

income to harvesters, processes, artisans, and designers, which was highlighted during focus group discussions. While the 2nd pillar of the CMAPS program focused on building Indigenous capacity to leverage the EU Exemption, the findings of this study suggest that an inward focus on building capacity and resolving issues in the local value chain will do as much, if not more, to support Nunavut Inuit priorities and self-determination as well as create more opportunities for export markets, if that is an avenue that Nunavut Inuit wish to pursue.

The international trade of sealskins was once a significant economic contribution to Inuit across Nunavut, which was devastated from anti-sealing campaigns that did not acknowledge Inuit rights or their involvement in the commercial seal market. In the years since, federal and territorial governments have prioritized improving market access for Nunavut sealskins to rectify these past injustices and enable Nunavut Inuit to capitalize on the economic benefits of participating in the commercial seal market. However, this study has shown that despite the best of intentions, a sustained and narrow focus on international markets will not likely benefit Inuit if their needs and interests in the local economy are not prioritized. As such, greater attention needs to be paid to development of the local Nunavut sealskin market in a manner that adequately reflects Nunavut Inuit interests and priorities and supports Inuit self-determination in Nunavut. With the recent approval of the Nunavut Fisheries and Sealing Strategy 2023-2028, there is an opportunity to address these issues in the local value chain and incorporate perspectives regarding marketing efforts into future programs and action plans. Furthermore, evaluation of the CMAPS program acknowledged that long-term commitments are required for capacity building and market access in the Canadian seal industry. As such, the findings from this study may be incorporated into future iterations of the CMAPS program to provide support for a strong, resilient, and self-determined local economy for Nunavut sealskins.

CONCLUSIONS

The findings of this study have significance for national policy surrounding seal market development initiatives

by asserting the importance of meaningfully including Nunavut in national policy discussions. While there are opportunities for seal harvesting and marketing initiatives in other regions of Canada, the vital role of seals and sealing to Inuit culture, nutrition, clothing, and survival in the Arctic for millennia cannot be understated, and as such, must be prioritized in national policy. While efforts to support the Nunavut seal market through CMAPS and the EU Exemption present socio-economic opportunities for Nunavut Inuit, the realization of these benefits will remain limited without placing Nunavut Inuit at the centre of policy development at federal and territorial scales. Furthermore, understanding the ways in which the federal government's initiatives either hinder or support access to harvesting and selling of fish and mammals (marine and otherwise) is important to realizing this priority across Inuit Nunangat.

Movement towards Inuit self-determination involves recognition of Inuit sovereignty over the use and economic development of natural resources, which requires economic development policies and programs that reflect Inuit priorities and needs. As the Arctic receives increasing international attention for geopolitical and economic development, it is important to develop policies and programmes that acknowledge the inherent rights of Inuit to govern and manage their own territory and develop economic policies on their own terms. An example of this is the development of the Nunavut seal market, which has been central to this discussion due to its long-standing cultural and socio-economic importance to Inuit. Unfortunately, all too often people outside Nunavut have been responsible for making decisions that affect Inuit, including the fate of the seal harvest. While they may have good intentions, "Southern solutions to Northern problems" are not as effective as Inuit-led initiatives.

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