An Overview of Understanding Alaska Research

Researchers

Scott Goldsmith, professor of economics, ISER
Gunnar Knapp, professor of economics, ISER
Sharman Haley, associate professor of public policy, ISER
Matthew Berman, professor of economics, ISER
Lance Howe, assistant professor of economics, ISER
Steve Colt, associate professor of economics, ISER
Mary Killorin, research associate, ISER
Rosyland Frazier, research associate, ISER
Terrence Cole, professor of history, University of Alaska Fairbanks
Mark Foster, Mark Foster and Associates
Fran Ulmer, director, ISER

Editors: Linda Leask, Mary Killorin, and Pamela Cravez
Graphics: Clemencia Amaya-Merrill

Understanding Alaska is a special series of ISER research studies examining Alaska economic development issues. They are paid for by the University of Alaska Foundation.

Cover photos courtesy of Gunnar Knapp and Diane Hirshberg
Dear Readers:

Welcome to Understanding Alaska. That’s a special series of studies we at the Institute of Social and Economic Research (ISER) started in 2001, examining economic development issues in the state. The studies are intended to help Alaskans understand how their economy works—and to shed light on ways it might grow in the future.

This publication summarizes our Understanding Alaska work to date. We hope what you see here tempts you to read more in the full publications, which you’ll find online at www.alaskaneconomy.edu.

The University of Alaska Foundation pays for Understanding Alaska research, with funds it receives from BP and ConocoPhillips. These companies provide funds to the foundation as part of their commitment to supporting education, under terms of a 1999 agreement with the State of Alaska.

We thank University of Alaska President, Mark Hamilton; the UA Board of Regents; and the UA Foundation Board for deciding that ISER’s work merits foundation support. Our Understanding Alaska work is ongoing, and we plan to look at many more issues important to Alaska’s future.

Please keep in mind that while the Understanding Alaska program is an important part of ISER’s research, it is only one part. The Alaska Legislature created ISER in 1961, and ISER has been analyzing social and economic issues and trends in Alaska since then.

ISER does research for dozens of both public and private organizations, from the National Science Foundation to the Alaska Department of Education to the Annie E. Casey Foundation. ISER’s faculty also teach and do a wide range of public service.

Alaskans have come to rely on ISER for information about the state’s people and economy. Please get in touch with us if you have questions about the Understanding Alaska program or other ISER research, and visit us online at www.iser.uaa.alaska.edu.

Fran Ulmer, Director
Institute of Social and Economic Research
University of Alaska Anchorage
INTRODUCTION

Understanding Alaska is a special series of studies by the Institute of Social and Economic Research (ISER), to examine economic development issues and help Alaskans understand how their economy works. The studies began in 2001, and here we highlight some of the work so far.

The University of Alaska Foundation has provided most of the funding for Understanding Alaska—see the director's letter on the facing page—but other organizations that rely on ISER's research and analysis have also supported this work. The studies examine how Alaska's economy works, why it's different from those in other states, and how Alaska's unique circumstances affect economic development.

Organization of Publication

This publication divides Understanding Alaska research into three categories: People, Economy, and Fisheries. At the end of each section is a list of the full reports or presentations excerpted for this overview and information on how to get copies. In some cases, we've updated information specifically for this publication.

Completed and Ongoing UA Work

Some of the work completed so far includes:

- A summary of the forces shaping Alaska's people and economy since statehood
- An assessment of how much of the rapid growth in Alaska's economy in recent decades is sustainable
- A comprehensive description of social and economic conditions among Alaska Natives
- A description of how changing markets and globalization are affecting Alaska's seafood industry
- A perspective on the role of North Slope oil in Alaska's history of resource development
- An analysis of growth in Alaska health-care spending
- A detailed look at the importance of federal spending to Alaska's economy
- An assessment of challenges Alaska's salmon industry faces and potential solutions
- A picture of changing economic and demographic conditions in Anchorage, where 40% of Alaskans live
- A look at how different racial and ethnic groups assess the quality of life in Anchorage
- An overview of the issues surrounding the proposed Alaska natural gas pipeline
- An analysis of the potential effects of a new state system for taxing oil and gas production

More studies of Alaska's unique economy, and the challenges inherent in its structure, are already underway or planned. Work we hope to add includes:

- An assessment of Alaska's changing economic structure
- An analysis of business taxes on various Alaska industries
- An investigation of the special problems that may come with resource windfalls
- A review of issues associated with allocating salmon among different users
- A database describing tourism in Alaska
- A description of rural Alaska's economic structure

About ISER

Understanding Alaska is just one part of ISER's broad-ranging research. ISER is in the College of Business and Public Policy at the University of Alaska Anchorage. It is Alaska's oldest public policy research institute, established by the Alaska Legislature in 1961.

ISER has over the years done research for hundreds of public and private organizations. You can find—and search—a list of more than 1,000 ISER publications since the 1960s on ISER's main Web site. Also on that site you'll find more about ISER, profiles of ISER staff, links to individual faculty Web sites, and announcements about new reports and upcoming events. See www.iser.uaa.alaska.edu.

Where to Get Copies

All new Understanding Alaska research is posted on the program Web site and is also available in hard copy. We announce new findings in our electronic newsletter, Research Matters.

To learn about our findings from either Understanding Alaska or ISER's many other projects, sign up for our electronic newsletter or our mailing list—or both.

To be added to Research Matters, our electronic newsletter, send a message with your e-mail address to: ResearchMatters@uaa.alaska.edu

To be added to our mailing list, call 907-786-7710 and give us your mailing address.

ISER Web Sites

Understanding Alaska: www.alaskaneconomy.uaa.alaska.edu
ISER Home Page: www.iser.uaa.alaska.edu
Kids Count Alaska: www.kidscount.alaska.edu
ALASKOOL: www.alaskool.org
Guide to the Budget: www.citizensguide.uaa.alaska.edu

ISER Address

Mailing: 3211 Providence Drive, Anchorage, AK 99508
Physical Location: Diplomacy Building, 5th Floor, 4500 Diplomacy Drive, Anchorage, Alaska
Alaska’s People

Alaska has about 665,000 people and a land mass of 375 million acres—which is twice the size of the 13 original American colonies. More than 40% of all Alaskans live in Anchorage, and nearly two-thirds are concentrated in the combined areas of Anchorage, the Mat-Su Borough to the north, and the Kenai Peninsula Borough to the south. Most of the rest live in a handful of large communities in the southcentral, interior, and southeast regions. About 10% live in hundreds of small remote communities around the state, mostly along coastlines or on rivers, far from road systems.

Alaska has the highest share of indigenous Americans of any state; one in five residents are Alaska Native. In the remote western and northern regions, Alaska Natives make up most of the population. But over the past 30 years, many Alaska Natives have also moved to Anchorage and other urban places where there are more jobs.

Alaska’s non-Native population has always been among the country’s most transient, waxing and waning with job growth and the ups and downs of a resource-based economy. The population is still mobile, but less so than it used to be. Since the 1990s there have been no big booms and busts, and the number of jobs and the population have grown slowly but steadily for nearly 20 years. Urban Alaska has become more like the rest of the U.S.—with an aging population, affluent baby boomers nearing retirement, and growing diversity.

Life in remote villages has also changed a lot in the past 30 years, with construction of new housing, local health clinics, and public water and sewer systems in most communities. But even though conditions are better, they still fall far short of those in urban areas. Rural residents continue to rely heavily on subsistence hunting and fishing, and incomes are low.

Despite the growing similarities between Alaskans and other Americans, Alaskans remain uniquely situated. No other state has the vast roadless distances, the harsh climate and terrain, and the broad expanses of permafrost. Those conditions sharply limit where people can live and make economic development difficult and expensive.

Land ownership in Alaska is also unique, with individual Alaskans owning less than 1% of the land. The federal government owns 60%, the state 28%, and Alaska Native corporations 12%. Those corporations were formed under terms of the 1971 Alaska Native Land Claims Settlement Act, and they have no equivalent anywhere else in the U.S. (See page 12.)

Alaska’s local government system is different as well. The state’s regional governments are called boroughs instead of counties, and about half the state has no organized borough governments. The state government provides basic services in those areas. Many small communities inside and outside boroughs also lack city governments. Alaska Native communities often have some combination of local tribal governments, councils formed under terms of the Indian Reorganization Act, and city governments.

Pages 3 through 6 discuss Understanding Alaska findings about the state’s people.
Long-Term Population Trends

- Alaska’s population has tripled since Alaska became a state in 1959. Alaskans today enjoy far more business services and amenities, better infrastructure, and lower living costs than just a few decades ago.
- People still move into and out of Alaska with booms and busts, but more of those drawn to Alaska during the booms of the 1970s and 1980s stayed on when the economy slowed, giving Alaska a more stable, older population with fewer young adults.
- Alaskans have become more diverse, especially in urban areas. The share of Alaskans who are Black, Asian, or Pacific Islander more than doubled since 1960.
- The disparity in numbers of men and women in Alaska has narrowed but not vanished. In 2005 there were 106 men per 100 women; in 1960 there were 132 men per 100 women.
- Alaskans have become increasingly concentrated in the southcentral region—because the boroughs to the north and south of Anchorage grew so fast in recent decades. In 1970, Anchorage, the Mat-Su borough, and the Kenai Peninsula Borough made up just under half the state population. By 2005 that share was 61%.
- Nearly 80% of Alaskans live in the five largest urban areas—the southcentral region plus the Fairbanks North Star Borough and Juneau. That’s up from 69% in 1970.
- The population of rural Alaska—defined here as everywhere except the five largest urban areas—grew 50% between 1970 and 2005. But the population in large urban areas grew much faster—150%. As a result, the share of Alaskans living in rural areas declined from 31% in 1970 to 21% by 2005.
- ISER projects that Alaska’s population will likely grow about 1% a year through 2020—considerably slower than in the 1960s through the 1980s. That growth will continue to be concentrated in southcentral Alaska.
Alaska Native People

- Alaska’s Native population more than doubled between 1970 and 2000. Public health programs and much better living conditions in remote villages have helped Alaska Natives rebound from devastating outbreaks of smallpox, influenza, tuberculosis, and other infectious diseases in the 1800s and early 1900s.
- More than 75% of homes in small rural places—mostly Alaska Native villages—had public water and sewer systems in 2005, compared with an estimated 10% in 1970. (Those figures are from the Alaska Village Safe Water Program, which classifies as “rural” places that have fewer than 600 residents and meet other criteria.) The federal and state governments built public sanitation systems in roughly 90 remote communities between 1975 and 2003.
- Alaska Natives have more jobs, higher incomes, and more education than ever. But they remain several times more likely than other Alaskans to be poor and unemployed and to drop out of school.
- Alaska Natives are moving from villages to urban areas for jobs. In 2000, 40% of Natives lived in urban areas, and if current trends continue that share will be 50% in 2020. Native women of working age are especially likely to live in urban places.
- The population of remote villages has also continued to grow, despite migration to urban areas.
- Large numbers of young Alaska Natives will be looking for jobs in the next 15 years. The Native labor force will be 40% larger in 2020 than it was in 2000.
- ISER projects that at current trends, the Native population will grow from 120,000 in 2000 to 165,000 by 2020.

**Estimated Number of Alaska Natives Moving From Rural To Urban Areas, 1990-2000**

Source: ISER estimates, based on U.S. census data

**Projected Growth in Native Labor Force, 2000-2020**

Source: ISER projections
Anchorage: Diversity and Growth

The Municipality of Anchorage, with a population of 277,000 in 2005, is by far Alaska’s largest city. Anchorage’s economy is also the biggest and most dominant in Alaska.

The two next largest cities after Anchorage, Fairbanks and Juneau, each had about 31,000 residents in 2005—but the broader Fairbanks North Star Borough had about 87,000.

- Fast growth in the nearby Mat-Su Borough is making Anchorage more of a commuter city. In 2005 an estimated 8,000 commuters drove from the Mat-Su to Anchorage daily. That’s nearly double the number in 1990—and the number of commuters could double again by 2030, if current trends continue.
- Anchorage is becoming more diverse, with fast growth among minorities and slow growth in the majority white population.
- More than a third of Anchorage’s residents in 2000 were baby boomers—one of the highest shares anywhere in the country. They are the city’s most affluent and best-educated group, and what they decide to do when they retire will have big effects on the city’s population and economy in the future.
- The city’s over-65 population is growing at five times the U.S. average, even before the baby boomers hit retirement age. At current rates, and given the city’s large number of baby boomers, the number of city residents over 65 could triple by 2020. Older residents can help stabilize the economy, because many have incomes that don’t depend on local jobs.
- Anchorage offers opportunity for immigrants, with international immigration 20% higher in the late 1990s than it was a decade earlier. The most common birth places of recent immigrants are Samoa and other Pacific Island places, the Philippines, and Mexico.

### Anchorage Civilian Population By Race

<table>
<thead>
<tr>
<th></th>
<th>1990</th>
<th>2000</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>164,136</td>
<td>170,145</td>
<td>+4%</td>
</tr>
<tr>
<td>Black</td>
<td>9,952</td>
<td>11,942</td>
<td>+20%</td>
</tr>
<tr>
<td>Asian</td>
<td>9,624</td>
<td>12,198</td>
<td>+27%</td>
</tr>
<tr>
<td>Ak. Native</td>
<td>14,750</td>
<td>23,803</td>
<td>N/A*</td>
</tr>
<tr>
<td>Pac. Isl</td>
<td>492</td>
<td>3,024</td>
<td>+415%</td>
</tr>
<tr>
<td>Other</td>
<td>N/A</td>
<td>10,954</td>
<td>N/A*</td>
</tr>
</tbody>
</table>

Notes: Includes those born in U.S. territories or commonwealths, but excludes those born to American parents temporarily living abroad. Figure exclude people living in group quarters. "Other" category includes people of mixed race, except Alaska Natives of mixed race, who are in Alaska Native category. We can’t calculate growth rates for these categories, because the mixed-race category did not exist until 2000.

Source: U.S. Census Bureau

### Anchorage People By Age, 2000

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Share of Civilian Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 20</td>
<td>31%</td>
</tr>
<tr>
<td>20-34</td>
<td>21%</td>
</tr>
<tr>
<td>35-55</td>
<td>36%</td>
</tr>
<tr>
<td>56-64</td>
<td>6%</td>
</tr>
<tr>
<td>65 and older</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau

### Anchorage Residents 65 and Older

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
<th>Share of Civilian Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>3,658</td>
<td>2.5%</td>
</tr>
<tr>
<td>1990</td>
<td>7,931</td>
<td>3.9%</td>
</tr>
<tr>
<td>2000</td>
<td>13,539</td>
<td>5.7%</td>
</tr>
<tr>
<td>2004</td>
<td>16,244*</td>
<td>6.4%</td>
</tr>
</tbody>
</table>

*Estimate

Sources: 2004, Alaska Department of Labor; other years, U.S. Census Bureau

### Projected Growth in 65+ Population

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
<th>Share of Anchorage Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>13,539</td>
<td>6%</td>
</tr>
<tr>
<td>2010</td>
<td>23,793</td>
<td>8%</td>
</tr>
<tr>
<td>2020</td>
<td>37,305</td>
<td>11%</td>
</tr>
</tbody>
</table>

Sources: U.S. Census data and ISER estimates

### Most Common Birth Places of Recent International Immigrants (1995-2000)

<table>
<thead>
<tr>
<th>Country</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Samoa, Guam, Other Pacific Islands</td>
<td>16%</td>
</tr>
<tr>
<td>Philippines</td>
<td>11%</td>
</tr>
<tr>
<td>Mexico</td>
<td>9%</td>
</tr>
<tr>
<td>Canada</td>
<td>4.5%</td>
</tr>
<tr>
<td>Korea</td>
<td>4.5%</td>
</tr>
<tr>
<td>Poland</td>
<td>4.5%</td>
</tr>
<tr>
<td>China</td>
<td>4%</td>
</tr>
<tr>
<td>Russia</td>
<td>4%</td>
</tr>
<tr>
<td>Thailand</td>
<td>3%</td>
</tr>
<tr>
<td>Colombia</td>
<td>3%</td>
</tr>
</tbody>
</table>

Notes: Includes those born in U.S. territories or commonwealths, but excludes those born to American parents temporarily living abroad

Source: U.S. Census Bureau
• The 93 languages spoken by Anchorage's school children reflect the diversity of the population. A large majority (86%) speak English as their first language, but 14% speak other languages, including Alaska Native languages. Spanish, Tagalog (the Philippines), Samoan (Pacific Island), and Hmong (southeast Asia) are the most common languages other than English. Many of the other languages have only a few speakers each.

• There's been a shift in Anchorage jobs in the past 25 years, with more of the better paying jobs requiring a college education. In 1980, high-school dropouts could earn nearly 75% of what college graduates earned. By 2000, that share had dropped to 43%.

• The rich aren't quite so much richer than the poor in Anchorage as they are nationwide. That's partly because the state makes annual payments to all residents—including children—from the earnings of the huge state savings account called the Permanent Fund (see page 7). Also, Anchorage doesn't have billionaires—who in other parts of the U.S. make the disparity between low and high incomes much larger. But there is still a lot of poverty among those at the bottom of the economic rung—concentrated among minorities, single mothers, old people living alone, and young people without much education.

For More Details

For complete Understanding Alaska reports and presentations about Alaska's people, go to the program Web site: www.alaskaneconomy.uaa.alaska.edu


Trends in Alaska's People and Economy, by Linda Leask, Mary Killorin, and Stephanie Martin.


Alaska Economic, Demographic, and Social Trends. Presentation by Scott Goldsmith.


Racial and Ethnic Diversity in Anchorage, by Scott Goldsmith and Rosyland Frazier.

Languages Spoken by Anchorage School District Students, 2006

<table>
<thead>
<tr>
<th>Language</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>42,830</td>
</tr>
<tr>
<td>Spanish</td>
<td>1,838</td>
</tr>
<tr>
<td>Tagalog (Philippines)</td>
<td>949</td>
</tr>
<tr>
<td>Samoan (Pacific Island)</td>
<td>819</td>
</tr>
<tr>
<td>Hmong (Southeast Asia)</td>
<td>765</td>
</tr>
<tr>
<td>Korean</td>
<td>369</td>
</tr>
<tr>
<td>Lao (Laos)</td>
<td>315</td>
</tr>
<tr>
<td>Yupik</td>
<td>290</td>
</tr>
<tr>
<td>Russian</td>
<td>161</td>
</tr>
<tr>
<td>Inupiaq</td>
<td>90</td>
</tr>
<tr>
<td>All other languages</td>
<td>971</td>
</tr>
<tr>
<td>Total</td>
<td>49,589</td>
</tr>
</tbody>
</table>

Source: Anchorage School District

What Difference Does Education Make?

Median Earnings of Anchorage Workers,* By Education Level, 2000

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Median Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than High School</td>
<td>$21,300</td>
</tr>
<tr>
<td>High School</td>
<td>$32,000</td>
</tr>
<tr>
<td>1 to 3 years of College</td>
<td>$36,000</td>
</tr>
<tr>
<td>Four or more years of College</td>
<td>$50,000</td>
</tr>
</tbody>
</table>

*Full-time workers

Median Earnings of High-School Dropouts as a Share of Earnings of College Graduates

<table>
<thead>
<tr>
<th>Year</th>
<th>Share of College Graduates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>72%</td>
</tr>
<tr>
<td>1990</td>
<td>56%</td>
</tr>
<tr>
<td>2000</td>
<td>43%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau

Who Lives in Households at the Bottom and the Top of Income Range? (As Share of Total Group)

<table>
<thead>
<tr>
<th>Category</th>
<th>Bottom 20% of HH</th>
<th>Top 20% of HH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children being raised by single mothers</td>
<td>51%</td>
<td>3%</td>
</tr>
<tr>
<td>People 65 and older</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>Full-time workers</td>
<td>7%</td>
<td>30%</td>
</tr>
<tr>
<td>Adults with 4 or more years of college</td>
<td>7%</td>
<td>39%</td>
</tr>
<tr>
<td>Residents by Race</td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>12%</td>
<td>27%</td>
</tr>
<tr>
<td>Black</td>
<td>29%</td>
<td>15%</td>
</tr>
<tr>
<td>Ak. Native</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>Asian</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Pac. Isl.</td>
<td>21%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau
Alaska’s Economy

When Alaska became a state, in 1959, some Americans thought it was a mistake: Alaska was too far away, cold, and undeveloped. It had few people and a fragile economy that relied largely on military activities and salmon fisheries.

But Alaska now has six times the jobs it had then. Most of that growth can be traced to oil development. In 1968, the Prudhoe Bay oil field—the largest in North America—was discovered on Alaska’s North Slope. A pipeline to carry that oil to market was completed in 1977. At the peak of production in 1988, the pipeline carried 2 million barrels of oil a day—about 20% of all U.S. oil production at the time.

The state government owns the North Slope oil fields, so it collects not only taxes but also royalties from oil production. From 1977 to 2005, the state collected (in today’s dollars) nearly $100 billion in oil revenues. It spent most of those revenues, paying for government operations, expanding services, and building infrastructure. But it also saved some.

In 1976, Alaska voters created the Permanent Fund, to save a share of the state’s oil revenues. The principal of the fund is protected by the Alaska Constitution. The state can, however, spend the fund’s earnings, and it spends some every year to send checks—Permanent Fund dividends—to all residents.

ISER estimates that one in three Alaska jobs depend on oil development—including direct industry jobs, jobs supported by state spending on oil revenues, and jobs supported by Alaskans’ spending of Permanent Fund dividends.

Since the 1990s, an infusion of federal money for projects and programs has also triggered new growth. ISER estimates that one in three Alaska jobs depend on federal spending.

So even though the economy is more diversified than it used to be, it still relies on resources—mainly oil—and federal spending. But oil production is less than half what it was at its peak, and declining oil revenues led to state budget deficits in most years from 1994 to 2004. There is also no guarantee that federal spending will remain at current levels—although military activities, huge federal land holdings, and obligations to Alaska’s indigenous people mean that federal spending will continue to be substantial.

Alaska also has valuable assets it lacked 30 years ago: more people, better infrastructure, reduced living costs, and the state Permanent Fund—the biggest legacy of oil revenues. That fund had a balance of about $34 billion early in 2006. Alaska has, for the first time, transformed a temporary resource into a permanent asset, capable of producing a big, relatively stable income every year.

What the future holds for Alaska’s economy is hard to know. Alaska has repeatedly been saved by surprise developments, with Prudhoe Bay being by far the largest. Much higher oil prices brought the state budget into balance and created a surplus in 2005—and likely will again in 2006. Higher prices for natural gas may make construction of a gas pipeline from the North Slope feasible. And if North Slope gas is marketed, the state government will have a major new source of income and Alaskans will have more jobs.

Pages 7 to 13 highlight Understanding Alaska studies of the state economy.

Alaska’s Resource-Based Economy

Alaska’s economy has always depended on natural resources. Tremendous wealth has been produced from fur, gold, copper, fish, and oil. Between 1868 and 2002, the value of Alaska resource production was around $400 billion, in today’s buying power.

• Before Alaska became a state, fish from Alaska waters—mostly salmon—were the territory’s most valuable resource, accounting for nearly two-thirds of the value of all resource production between 1868 and 1958.
• Since statehood, oil has made up nearly 85% of the value of all Alaska resource production. It’s also been far more valuable than any previous development. Oil produced from 1959 to 2002 was worth seven times all the resource production from the time the U.S. bought Alaska in 1868 until it became a state in 1959.
Unlike with previous developments, Alaska has seen big benefits from oil development. The state owns the North Slope oil fields, and taxes and royalties over the years have amounted to about one quarter of the value of oil production (measured at Valdez, the pipeline terminal).

The state’s oil revenues have paid almost all state general expenses since 1978, and state spending of those revenues fueled economic growth, particularly at the peak of production and revenues in the 1980s.

Alaska now has an asset—the Permanent Fund—capable of generating more than $1.7 billion in annual income, in addition to earnings needed to protect the principal from inflation. The fund had a balance of more than $34 billion in early 2006. The Alaska Constitution prohibits the state from spending the principal of the fund but not the earnings.

Alaska has also taken a portion of its oil royalties in kind—that is, in oil—and sold the oil under long-term contracts, to help develop local refineries. Those refineries have provided jobs, added to local tax bases, and benefited Alaska consumers and businesses.

### Proposed Natural Gas Pipeline

Natural gas may be the next big resource development in Alaska. The state’s North Slope has one of the largest accumulations of natural gas in the country—35 trillion cubic feet of known resources. For perspective, that’s the energy equivalent of 6 billion barrels of oil, or about half the estimated energy in the Prudhoe Bay field when it was discovered. Total reserves may be in the range of 100 trillion cubic feet, according to the U.S. Geological Survey.

The known resources lie under land the state owns, but it has leased the oil and gas rights to BP, ConocoPhillips, and ExxonMobil. The state owns a royalty share of the gas—12.5%—and it has the authority to collect production, corporate income, and property taxes.

Until recently, investors didn’t think a gas project would be economic, given that the pipeline needed to carry the gas to market is expected to cost in the range of $20 to $25 billion. Now, with higher natural gas prices and changes in the North American market, many people think a pipeline project may be feasible.

What route the pipeline would follow, how it would be financed, and who would own it had not yet been determined in early 2006. The two routes most talked about are (1) from Prudhoe Bay into the Interior and then along the Alaska Highway into Canada and the Lower 48, and (2) from Prudhoe Bay to Valdez, paralleling the existing trans-Alaska oil pipeline.

Even under the most optimistic projections, gas production wouldn’t start in this decade. But Alaska ultimately stands to gain a lot if a gas pipeline is built—a new long-term source of state revenues; more jobs and increased business activity; an increased local property tax base; and a potential new in-state source of natural gas for home heating, electricity, and industrial uses.

### Proposed Gas Pipeline Routes (2005)

![Map of Proposed Gas Pipeline Routes](image)
Still, despite improved conditions, the potential pipeline remains a big, risky investment. The state can’t control if or when a pipeline is built. But the Stranded Gas Act allows the state government to encourage large gas projects that might otherwise be uneconomic, through special fiscal terms.

The state has used the gas act to negotiate with the North Slope leaseholders, and in May 2006 the governor released a draft agreement between the state and the leaseholders. Major provisions call for the state to own a share of the pipeline; to take its royalties and production taxes in gas rather than in payments from the producers; to market the gas itself; and to keep tax provisions unchanged over the term of the project, if the leaseholders meet specific work commitments.

No agreement will go into effect until it has had public review and the legislature approves it. Even if an agreement is approved, that doesn’t mean a pipeline will be built. The agreement would set terms if a pipeline is built. To help Alaskans understand the policy issues associated with a potential gas pipeline, ISER described those issues in a short publication and held a public forum in November 2005. The publication and forum presentations are available at:

www.alaskaneconomy.uaa.alaska.edu/pipeline.htm

Federal Spending in Alaska

The federal government and a few private industries—oil, tourism, commercial fishing, mining, logging—bring in most of the new money that makes Alaska’s economy grow. How important is federal spending? The $8.4 billion the federal government spent in Alaska in 2004 was roughly equivalent to all the wages private industry paid, and more than triple the state’s General Fund revenues. In 2002, ISER estimated that federal spending supported one in three Alaska jobs.

Federal spending has always been important to Alaska’s economy, but it became even more prominent in recent years, because it grew so fast. Federal spending more than doubled in the past 20 years, even adjusted for inflation.

Spending per Alaskan is high for a lot of reasons—including military activities, federal obligations to Alaska’s indigenous people, large federal land holdings, higher costs of rural construction, and the continuing need for new sanitation systems, roads, and other infrastructure. Everybody in Alaska benefits in one way or another from federal money.

- Roughly 40% of federal spending is for individual Alaskans—who collect pay checks, Social Security, or other federal payments. State and local governments get about 30% of federal money in the form of grants for everything from road construction to medical care for the poor.
- Businesses get about 20%, because the federal government buys equipment and supplies and hires companies to do construction, building maintenance, and other services.

- Native non-profit organizations get about 8%, for providing health and other services to Alaska Natives. The University of Alaska, private colleges, and school districts get about 2%.
- Military spending remains critical to Alaska’s economy. Forty years ago, military spending made up most federal spending in Alaska. With the fast growth in other kinds of federal spending and the closing of some military bases in Alaska, military activities are no longer as dominant. But even today, with numbers of military personnel at less than two-thirds their 1960 levels, Department of Defense spending in Alaska totaled more than $2 billion in 2004.

<table>
<thead>
<tr>
<th>Source: ISER analysis of federal spending</th>
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<tbody>
<tr>
<td>State General Revenues $2.4 billion</td>
</tr>
<tr>
<td>Perm. Fund Dividends $580 million</td>
</tr>
<tr>
<td>Federal Spending $8.4 billion</td>
</tr>
<tr>
<td>Private Industry Wages $8.3 billion</td>
</tr>
</tbody>
</table>

Who Gets Federal Dollars? (As of 2002)

- Alaska Native Non-Profits 8%
- Non-Profits 3%
- University and others 2%
- Individuals 41%
- State and Local Governments 28%

Sources: Consolidated Federal Funds Report and Federal Assistance Awards Data System

The Military in Alaska

The military has been a mainstay of Alaska’s economy since World War II.

The military remains the largest single employer, even with fewer personnel.

- Department of Defense spending in FY 2004 was about $2.3 billion.
- Payroll $1 billion.
- Construction, Equipment, Supplies $1.3 billion.

Sources: ISER database; Consolidated Federal Funds Report
Jobs and Income

For most of the time since Alaska became a state, economic growth has been driven by oil development. The economy has gone through several boom-and-bust cycles related in one way or another to the fortunes of oil. But the busts didn't eliminate all the growth the booms brought, and Alaska always ended up with more economic activity than before.

Since 1990, economic growth has been slower, because both oil production and state oil revenues have been in decline. Rapid growth in federal spending, and sharply higher oil prices in the most recent years, have helped offset the effects of declining oil production.

The future is impossible to predict, especially in Alaska, where unexpected events have so often helped the economy. But barring any big surprises, it's most likely that economic growth will be slower in the coming years, as the economy continues to adjust to smaller oil production. If North Slope natural gas is developed, it won't be on the market for years. Other commodity-producing industries—fishing, mining, and logging—will help support the economy but will also cycle up and down. And because government spending plays such a big role in Alaska's economy, decisions made in Washington, D.C. and Juneau will continue to influence the economy.

In 2005 Alaska had nearly six times more jobs than in 1961. Service and trade industries created about half the new jobs since 1960, as the economy matured and established local support industries and as tourism increased. The labor force also changed, as the share of working-age women with jobs increased from under 40% in 1960 to about 68% now.

- Job growth in the 1990s was much slower than in the early decades of statehood and will likely be slower yet through 2020, at an average of under 1% a year.
- Per capita incomes of Alaskans were about 3% above the U.S. average in 2004, in sharp contrast to the much higher relative incomes during the economic booms of the 1970s and 1980s. Slower job growth, elimination of some high-paying jobs in the oil industry, and addition of lower-paying trade and service jobs in the past decade drew Alaska incomes closer to national averages. However, keep in mind that in the past several decades living costs in Anchorage and other urban Alaska places have also declined relative to U.S. averages (see facing page).
- Growth in real (adjusted for inflation) per capita income in the coming years will likely be less than half a percent a year, reflecting slower job growth, a continuing shift to lower-paying jobs, and slower growth in government payments to individuals.
Alaska Costs

Living in Alaska has historically cost more than in other U.S. places. Alaska is far from the contiguous states; transporting goods here—especially to remote places—adds to their costs; small communities can’t take advantage of economies of scale; many places are accessible only by air or water.

Costs in remote rural areas are still very high, but over time most living costs in Anchorage and urban places have moved much closer to the U.S. averages—thanks mostly to growing local populations and more efficient transportation. ISER estimates that in 2005 overall costs of living for families in Anchorage were in the range of 10% above the U.S. average.

The big exception is medical costs, which have remained high. As is true across the U.S., health-care costs in Alaska have been growing faster than costs of just about everything else, taking more of family budgets and driving up labor costs for businesses.

But medical costs were higher in Alaska to begin with, and they seem to have risen as fast as costs nationwide. Overall Alaska medical costs are in the range of 25% above national averages—but the difference varies quite a bit among various services and procedures.

In 2006 an Understanding Alaska study looked at health-care spending in the state and found:

- Health-care spending in Alaska totaled $5.3 billion in 2005, up from about $1.6 billion in 1991. For perspective, $5 billion is one-third the value of North Slope oil exports in 2005—a year when oil prices were high. It’s nearly one-sixth the value of everything Alaska’s economy produced in 2005.
- Per person spending for health care in Alaska increased 176% in just 15 years.
- Health-care spending could double again between 2006 and 2013, if current trends continue.
- Everyone saw big increases in health-care spending, but costs for employers (both private and public) increased the fastest, nearly quadrupling between 1991 and 2005. Costs for individual Alaskans roughly tripled, as did costs of government programs. The largest and the fastest-growing is Medicaid, the joint federal-state program mainly for low-income and disabled people.
- Population growth and general price inflation account for roughly 40% of the annual growth in health-care spending in Alaska in recent years. What’s driving the rest of the growth? Just about everybody has an opinion, citing many possible contributors—including the U.S. system of health-care delivery; changes in treatments and technology; a growing number of older Americans and other changing demographics; high profits for insurance and drug companies; over-eating and inactivity among Americans; and others. The study drew no conclusions about what’s driving health-care costs—but future Understanding Alaska work will collect more data on Alaska’s health-care industry and attempt to shed more light on what’s behind the fast growth in health-care costs.
**Alaska Native Corporations**

Alaska has both for-profit and non-profit Native corporations that have a growing role in the economy.

The 1971 Alaska Native Claims Settlement Act (ANCSA) established for-profit corporations to manage the 44 million acres and $1 billion awarded Alaska Natives in settlement of their aboriginal land claims. Those are 13 regional corporations (12 in Alaska and 1 outside) and more than 200 village corporations. The corporations are a unique experiment in methods of settling aboriginal claims.

There are also non-profit Native corporations that are separate from the ANCSA corporations; they largely grew out of Native associations that pre-date ANCSA. The non-profits administer federal and state health, housing, and other social service programs. The figure below highlights some of the economic contributions of Alaska Native corporations.

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**Alaska Native Corporations in the State Economy, 2005**

The for-profit Native corporations formed under the 1971 Alaska Native Claims Settlement Act and the non-profit Native corporations that administer federal and state social service programs contribute to the economy in a number of ways.

The for-profit corporations are by far Alaska’s largest private land owners, owning 12% of Alaska lands. Other private landowners own about 1%.

Together, the for-profit and non-profit Native corporations make up 1 in 6 of the state’s largest 100 employers and employ more than 11,000 people.

The for-profit corporations award more than $4 million in scholarships to an average of about 2,900 students per year.

The for-profit regional corporations have paid more than $1.3 billion in dividends to their shareholders through 2003. The map shows cumulative dividends per shareholder from 1971 through 2003.

**Cumulative Dividends Per Shareholder, Alaska Native Regional Corporations, 1971-2003**

*$For consistency over time, dividends per shareholder are based on original number of shareholders owning 100 shares each. Includes special distributions by Cook Inlet corporation. Some corporations have also made special distributions to Native elders.

Sources: Association of ANCSA Regional Corporation Presidents/CEOs; annual reports, regional corporations; Alaska Department of Labor and Workforce Development, Research and Analysis
Effects of Permanent Fund Dividends

An important and unique influence on economic life in Alaska is the annual Permanent Fund dividend. Every year since 1982, the state government has paid individual Alaskans “dividends” from the earnings of the Permanent Fund, the big state savings account established with a share of oil revenues.

Total dividend distributions vary by year, based on changes in fund earnings. In recent years they’ve amounted to anywhere from $500 million to $1 billion annually. In 2005, the total dividend distribution was $558 million, or about $850 per Alaskan.

These dividends have major economic effects. They boost incomes of all Alaskans, but their effects on poorer Alaskans are striking. Understanding Alaska research has found that dividends help make income distribution in Alaska more equitable than it is in other states.

Dividends also reduce poverty in Alaska; for example, ISER estimates that without the dividends, twice as many Anchorage residents would have fallen below the federal poverty line in 2000.

And in remote rural areas, where average incomes are low, dividends are big contributors. For example, in 1999, when dividends were close to $2,000 per Alaskan, they made up 15% of per capita income in the Wade Hampton census area in western Alaska, which has the lowest incomes in the state.

When Alaskans spend their dividends, the effects ripple throughout the economy, supporting thousands of jobs. ISER estimates that every $1 million of Permanent Fund dividends supports about 9.5 jobs in private industry. So in 2005, total dividends of about $558 million would have supported roughly 5,300 jobs in private industry—or about 2 in 100 of all private jobs. (That estimate is based on calculations ISER did in 1999, adjusted for price increases since then. See www.citizensguide.uaa.alaska.edu.)

For More Details

To see complete Understanding Alaska reports and presentations on the economy, go to the program Web site: www.alaskaneconomy.edu

- The Alaska Natural Gas Pipeline: What’s It All About? (various authors).
- Understanding Alaska State Finances, by Sharman Haley.
- Alaska’s $5 Billion Health-Care Bill, by Mark Foster and Scott Goldsmith.
- Trends in Alaska’s People and Economy, by Linda Leask, Mary Killorin, and Stephanie Martin.
- Alaska Business Development. Presentation by Lee Gorsuch.
- Visitor Expenditures. Presentation by Steve Colt.
- Economic Contributions of University Research, by Scott Goldsmith and Pamela Chavez.
- Blinded by Riches: The Prudhoe Bay Effect, by Terrence Cole.
- Economic Development Through State Ownership of Oil and Gas, by Matthew Berman.
- Sustainable Development and Sustainable Income from Alaska’s Resources, by Matthew Berman

Permanent Fund Dividends Per Person, 1982-2005

<table>
<thead>
<tr>
<th>Year</th>
<th>Dividend</th>
</tr>
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<tbody>
<tr>
<td>1982</td>
<td>$1000*</td>
</tr>
<tr>
<td>1983</td>
<td>$404</td>
</tr>
<tr>
<td>1984</td>
<td>$952.63</td>
</tr>
<tr>
<td>1985</td>
<td>$990.30</td>
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<tr>
<td>1986</td>
<td>$1963.86</td>
</tr>
<tr>
<td>1987</td>
<td>$1850.28</td>
</tr>
<tr>
<td>1988</td>
<td>$845.76</td>
</tr>
</tbody>
</table>

*1982 dividend was a special legislative appropriation from the General Fund, not PF earnings.

Source: Alaska Permanent Fund Corporation
Alaska has subsistence, sport, and commercial fisheries that benefit Alaskans, their communities, and the economy in various ways. Here we discuss only the commercial fisheries, because that’s what Understanding Alaska research has examined so far. And because there are a number of reports and presentations on commercial fishery issues, we summarize them separately here, in addition to the earlier general discussion about Alaska’s resource-based economy.

What Are Alaska’s Commercial Fisheries?

Alaska’s fisheries are among the richest in the world, producing half the seafood harvested in the U.S. Those fisheries are critical to Alaska’s economy, supporting tens of thousands of jobs, mainly in coastal communities. Fish have been harvested commercially in Alaska waters for more than 120 years. Before Alaska became a state, fish—almost entirely salmon—accounted for nearly two-thirds of the value of Alaska’s resource production. (See page 8.)

In 2004, fishermen harvested about 5.4 billion pounds of seafood with a value of $1.2 billion from Alaska waters. The state’s seafood catch includes salmon, halibut, shellfish (mainly crab), herring, and groundfish.

Groundfish, mostly from the Bering Sea, account for more than 80% of the weight of the catch. But salmon, halibut, and shellfish are all more valuable per pound, so groundfish make up only about half the value of the catch.

In general, the state government manages fisheries within three miles of shore and the federal government manages fisheries beyond the three-mile limit. Of the fisheries the state manages, salmon are by far the most valuable. A few fisheries are managed jointly, and management of some (halibut, for example) is governed in part by international treaties.

Effects of Farmed Production and Globalization

The world seafood industry is in a period of rapid and profound change, driven by growing production of farmed fish—aquaculture—and by globalization. Those factors are transforming seafood production, processing, and distribution in Alaska and around the world.

Production of farmed fish (including salmon and many other species) is growing rapidly, because fish farmers can meet market demand for predictable, year-round supplies. Growing supplies of farmed fish have far-reaching implications for wild seafood:

- Increasing the supply of farmed fish puts downward pressure on prices of both farmed and wild fish.
- Farmed fish set new standards for consistency, availability, and quality.
- Farmed production changes the dynamics of seafood markets. Prices don’t increase as much when wild catches fall, or decrease as much when wild catches rise.

Farmed production is likely to keep growing rapidly. The global fish-farming industry has big resources to invest in research, production, and marketing—and technological innovation is occurring quickly.

Globalization of seafood markets is another major force affecting Alaska seafood producers. It increases competition from other suppliers around the world and prompts new demands from buyers—which add to producers’ costs. Specific changes resulting from globalization include:

- Rapid expansion of seafood trade and a shift of processing to countries with lower labor costs
- Increasing consolidation and market power in the retail and food-service industries
- Restructuring of seafood distribution networks and increasing pressure on seafood suppliers to improve quality and reduce costs
- Establishment of international standards for food handling and safety
- More demands from buyers for new types of products

Together, globalization and aquaculture will put downward pressure on prices for wild-fisheries products and contribute to economic, social, political, and management changes for wild fisheries.

However, those two factors will also create new opportunities for wild fisheries, by expanding global demand and creating new niche markets. Wild fisheries that can meet market standards for quality and consistency will be able to take advantage of these new opportunities.
Nowhere have the effects of aquaculture and globalization been more apparent than in Alaska’s salmon fisheries. The world supply of farmed salmon increased from 8 metric tons in 1980 to nearly 1,400 metric tons by 2004.

Alaska’s Salmon Fisheries

The state government manages Alaska’s 26 commercial salmon fisheries, with 5 species of wild salmon. Its biological salmon management has been very successful. Alaska’s wild salmon harvests are the world’s largest, making up 40% of wild salmon harvests worldwide and 15% of combined wild and farmed production. The 2005 Alaska salmon harvest was the second-largest in history.

Still, much of Alaska’s salmon industry has been in economic trouble for 15 years. Despite large harvests, real (adjusted for inflation) fishermen’s earnings plummeted by nearly three-quarters between 1988 and 2002. Since 2002, earnings in many fisheries have rebounded significantly. But it’s important to keep in mind two things about the good news in the past several years:

- Not all salmon species or areas have seen price increases. Prices for chinook and coho have increased significantly. Prices for sockeye and chum salmon have not increased as much, and prices for pink salmon have stayed about the same.

- The recovery in earnings varies by fishery, and in most fisheries earnings remain far below their levels of the late 1980s. The table shows 2002 and 2005 earnings by fishery, as a percentage of the averages from 1986-1990, when earnings peaked. In a few fisheries, 2005 earnings were as much as 90% of what they had been in the late 1980s. But in many they were less than half, and in a few, less than 20% of what they had been.

Earnings are lower than in the 1980s for complex reasons that vary by fishery. But there are some broad causes.

- A steep fall in prices was the biggest reason for the decline in earnings in most fisheries, and competition from farmed salmon was the most important cause of lower prices. But large Alaska canned salmon production, an economic slowdown in Japan (historically Alaska’s most important salmon market), and changes in the food industry also contributed.

- Sockeye catches declined by more than half between 1995 and 2002, at the same time prices were falling. Sockeyes typically command the second-highest prices among Alaska salmon (chinook being the highest) and account for half of total earnings. The combined drop in sockeye catches and prices accounted for more than half the decline in overall earnings between 1988 and 2002.
Are Changes Needed? ————————————————————

Despite its economic troubles, the salmon industry is still one of the state’s biggest employers. The Alaska Department of Labor and Workforce Development estimates that in 2004 nearly half of all the harvesting jobs in the state’s seafood industry were in the salmon fisheries.

The importance of the salmon industry to thousands of individual Alaskans, dozens of coastal communities, and the state economy has prompted many discussions among fishermen, processors, managers, and government officials about how to help the salmon industry regain profitability.

Better marketing and new products have helped, and (as we discussed earlier), prices in some fisheries—especially chinook and coho fisheries—have gone up. But the underlying challenges of growing competition and changing global seafood markets are still there.

Those continuing challenges have led people inside and outside the industry to talk about whether and how to “restructure” Alaska’s salmon fisheries—that is, to change the rules about who can fish, when and where they can fish, and how much they can catch. The goal of such changes would be to make Alaska fishermen more competitive, by reducing costs or improving the quality and value of the catch.

There are many possible restructuring options—reducing the number of boats; allowing permit holders to combine operations and fish more gear from one boat; buying back limited entry permits; and establishing harvester co-ops, among others.

But if restructuring could help the salmon industry compete, why has the harvesting system stayed essentially the same, after more than a decade of economic crisis? For a number of reasons:

• The salmon fisheries are diverse; each has its own issues.
• Restructuring is complex. Any of the many possible changes would carry its own potential benefits and concerns, as well as legal and other uncertainties.
• There is no consensus among Alaskans about the need for restructuring, what restructuring should accomplish, and who should benefit.
• No organization in state government has clearly defined responsibility for the economic success of the fisheries; clear and broad authority to make changes; and resources to take action on restructuring proposals.

An Experiment in Restructuring ————————————————————

The experience of the Chignik fishing co-op illustrates the obstacles to restructuring. It is the only recent experiment in major restructuring of an Alaska salmon fishery.

In 2002, some Chignik permit holders asked the Alaska Board of Fisheries (which oversees state fisheries management) to allocate part of the Chignik salmon harvest to a co-op. Those permit holders who chose to join could cut costs by catching the co-op’s allocation with fewer boats and then sharing the profits. Those who didn’t want to join could fish independently for a separate allocation. After much debate the board agreed, and more than 75 of the 100 Chignik permit holders joined the co-op.

From 2002 through 2005, the co-op members caught their allocation with about 20 boats. Independent permit holders had a separate allocation. In a 2002 Understanding Alaska survey, most of those who joined the co-op said they were better off financially as a result.

But some Chignik permit holders strongly opposed the co-op. Nearly all the independent fishermen surveyed said they were worse off because of it. Many argued that it was wrong for permit holders to earn income without fishing.

After years of legal challenges to the co-op, the Alaska Supreme Court ruled in early 2006 that it violated the state’s limited entry law, which requires permit holders to fish their own permits. The court ruled that only the Alaska Legislature—not the Board of Fisheries—had the authority “to approve cooperative salmon fisheries.”

Under the Alaska Constitution, the legislature has ultimate management authority for the salmon fisheries. The court’s ruling shows that any significant restructuring would likely require the legislature to take action on this complex and controversial issue—at a time when the legislature is also facing many other difficult issues.

For More Details ————————————————————

Understanding Alaska will continue to study and report on Alaska’s salmon fisheries. To see fisheries reports, presentations, and workshop materials to date, go to the program Web site: www.alaskaneconomy.edu

Effects of the 2002 Chignik Salmon Cooperative: Results of a Survey of Permit Holders, by Gunnar Knapp.

Charting New Courses for Alaska Salmon Fisheries: The Legal Waters (various authors).


Long-Term Outlook for Salmon Returns, by Milo Adkison and Bruce Finney.


Change, Challenges and Opportunities for Wild Fisheries. A presentation by Gunnar Knapp.

Fisheries Co-ops and Beyond: Realigning Fisheries Management. A workshop on fisheries self-governance.


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**ISER Contact Information**

Phone: 907-786-7710  
Fax: 907-786-7739  
Mailing address: 3211 Providence Drive, Anchorage, Alaska 99508  
Physical location: Diplomacy Building, 5th Floor, 4500 Diplomacy Drive, Anchorage

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