NUCLEAR WASTE MANAGEMENT ORGANIZATION
SOCIÉTÉ DE GESTION DES DÉCHETS NUCLÉAIRES

Regional Economic Development Study Report - Southwestern Ontario Community Study

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This report has been prepared under contract to the NWMO. The report has been reviewed by the NWMO, but the views and conclusions are those of the authors and do not necessarily represent those of the NWMO.

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Regional Economic Development Study

Southwestern Ontario Community Study

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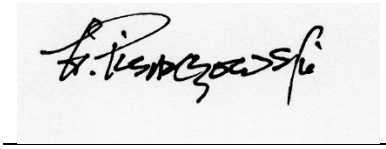

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Acronyms

AI .....Artificial Intelligence
CECI.....CanExport Community Investment
DPRA.....DPRA Canada Inc.
IA .....Impact Assessment
ICCE.....Invest Canada CanExport
MCR .....Major Component Replacement Project
MOU.....Memorandum of Understanding
MSB .....Municipality of South Bruce
NORCAT.....Northern Centre for Advanced Technology
NRCAN.....Natural Resources Canada
NWMO .....Nuclear Waste Management Organization
OCNI .....Organization of Canadian Nuclear Industries
OYAP .....Ontario Youth Apprenticeship Program
SOMA .....Southwestern Ontario Marketing Alliance
SON .....Saugeen Ojibway Nation
SWOTs.....Strengths Weaknesses Opportunities and Threats

Executive Summary

Context

1. The *Regional Economic Development Study* is one of a number of socio-economic community studies being developed by NWMO and the Municipality of South Bruce (MSB). The overarching objective of this study is to identify economic development opportunities associated with the Adaptive Phased Management Project ('the Project') that can be realized by area municipalities and businesses located within its vicinity.

2. Three study areas have been used to frame this study:
    a. Regional Study Area (RSA) – 7 Counties and 1 Region
        Bruce County, Grey County, Huron County, Wellington County, Perth County, Oxford County, Middlesex County and Waterloo Region
    b. Local Study Area (LSA) – 13 Municipalities in 4 Regions
        South Bruce, Huron-Kinloss, Kincardine, Saugeen Shores, Arran Elderslie, Brockton, Hanover, West Grey, Minto, Howick, Morris Turnberry, North Huron, Ashfield-Colborne-Wawanosh
    c. Core Study Area (CSA) – 5 Municipalities in 2 Counties
        South Bruce, Huron-Kinloss, Brockton, Morris-Turnberry, and North Huron

    The study areas all nest within each other, such that the LSA and CSA are not separate but lie within and are part of the larger RSA.

3. Three temporal boundaries define the critical horizons of the Project for this study.
    a. Pre-Construction – 2028 to 2032
    b. Construction – 2033 to 2042
    c. Operation – 2043 to 2088

4. This Study provides an approach to an economic development strategy. It is presented by the authors to foster discussion only. It does not represent commitments or actions for the NWMO, the Municipality of South Bruce, or other parties. The final decisions on actions and commitments will be made at a future date.

Situational Analysis

1 The strength of the RSA is largely due to the influence of Wellington, Middlesex, Oxford, and Waterloo. All four of these municipalities have highly diversified economies, a large pool of skilled knowledge workers, and a concentration of companies in advanced manufacturing, food processing and information technology.

2 The economies of those communities that make-up the LSA and CSA are much less diversified and when compared to the RSA the number of jobs and companies located in those study areas drop-off dramatically. The LSA accounts for only 5% of the jobs and 5% of the companies, while the CSA only captures 1% of the jobs and less than 2% of the companies.

3 In the RSA, Manufacturing is the dominant industry sector; in the LSA it is Utilities; and in the CSA it is Agriculture and Forestry. Construction is a key sector in all of the study areas, but the magnitude difference is significant. The Construction sector in the RSA is 13 times the size of the sector in the LSA and over 41 times the size of the sector in the CSA.

4 Total employment numbers for the top ten sectors in the RSA, LSA and CSA are respectively 712,000, 39,300 and 10,500, providing a rough indication of the scalar difference between the economies of the three study areas.

Supply Chain Capabilities

1 The RSA economy has enormous scope and scale, and for many industry sectors it is a significant economic force at the provincial and national levels. The LSA and CSA in most cases are relatively minor players in comparison. Outputs in the RSA are commonly measured in the $billions, whereas in the LSA the level is $100s of millions and in the CSA study area $10s of millions. There are exceptions but in general, there are considerable differences in the economic weight, reach and self-sufficiency of the three study areas.

2 There is considerable strength in the RSA for both nuclear and non-nuclear capability across design and contractor services and equipment supply. Dropping down to the LSA, there is medium strength across all these sectors. On the nuclear front, aided in large part by Bruce Power's insistence that suppliers to the MCR Project have a local presence, many of the major engineering companies with design capabilities have offices in the LSA particularly in Kincardine and Saugeen Shores. At the CSA level both nuclear and non-nuclear capacity drops off dramatically.

3 On the non-nuclear front, construction services and equipment supply companies have a presence in the LSA but with strong connections via supply chain linkages to parent companies and non-related firms within the RSA. The fact that Kincardine and Saugeen Shores are the two largest settlement areas in Bruce County and are the two municipalities slated for

the most growth going forward make them focal points for companies with construction capability in the non-nuclear sector.

4 The CSA has little capacity on the nuclear construction front. Some companies - largely in Walkerton - are minor players in the supply chain and the recent establishment of the Kinectrics Laundry Facility in Teeswater also provides a nuclear connection. A few residents of the area are also part of the labour forces associated with the MCR Project and Bruce Power operations. Overall, however, the CSA shows no critical mass or capability on this front relative to the RSA and LSA.

5 Turning to non-nuclear construction capabilities, the CSA has very limited capability for the supply of design services and equipment supply. With respect to contactor services, the key strength of the area is in the residential construction sector. There is very little capability in the non-residential construction sector. These circumstances suggest that the most immediate opportunities for the CSA on Project construction are associated with accommodation. Contractor upskilling should also be a priority to strengthen capabilities and experience in the area for the supply of non-residential contractor services.

6 The CSA is nested within the larger, stronger, and more diversified economies of the LSA and RSA. Economic opportunities associated with the Project will in most cases migrate to businesses already located in these surrounding areas, especially since their relative proximity precludes distance from being a limiting factor.

7 Representatives from the CSA municipalities have all expressed a desire to see economic benefit derived from the potential Project. For this to happen, the CSA will need to become proactive and focused in order to compete with the other study area communities and capture their fair share of economic development.

The Strategy

1 The report sets out a strategy map for regional economic development to guide the Core Study Area Municipalities toward desired outcomes. This map is comprised of 4 tiers:
   a. Enablers,
   b. Connections and Opportunities,
   c. Value Proposition, and
   d. Desired Outcomes.

Enablers

1 Enablers are the key stakeholders that initially need to be aligned and brought together through partnerships and alliances to effectively pursue regional economic development around the Project. While the key stakeholders have been identified, it is not clear whether or not they would agree to form an Economic Development Collaborative.

2 Key ingredients for realizing a "Core Study Area Economic Development Collaborative" team ('the Collaborative') include: trust, alignment, broad thinking, and teaming.

3 Potential Collaborative members at the time of writing include: South Bruce, Huron-Kinloss, Brockton, Morris-Turnberry, North Huron, and the Saugeen Ojibway Nation (SON). NWMO could either be a member of the Collaborative or a Partner to it through its Memorandum of Understanding (MOU) with the Municipality of South Bruce (MSB).

4 The Collaborative should be based on an MOU that will be negotiated and developed by the Partners establishing their common ground, shared interests, and objectives.

Connections and Opportunities

1 The Collaborative will seek to build relationships with a variety of organizations, agencies, and government departments/ministries to deliver its mandate to implement economic and workforce development initiatives. The intent will be to determine those organizations that share similar objectives to facilitate developing mutually beneficial relationships.

2 Making connections and identifying opportunities go hand in hand, and there is not necessarily an order of one before the other. However, in most cases the tendency will be to identify an opportunity and then assess who might be most suited to help move the opportunity forward and carry out implementation.

3 The Project presents an interconnected constellation of opportunities potentially spread across a variety of geographies and locational interests.

4 The report presents a suite of opportunities for consideration that are based on experience and organized in four themes:

a. Training and Recruiting
b. Supply Chain Considerations
c. Resource Use and Enhancement
d. Community Initiatives

5 The opportunities presented and the associated SWOTs (Strengths Weaknesses Opportunities and Threats) evaluations are not meant to be exhaustive. Other opportunities can be added and some of those identified discarded. Moreover, the evaluations can change based on new considerations and understandings of the Collaborative members.

Value Proposition

1. All strategies in part and in whole must aim to create value. In group strategy, value is generated by the shared capabilities and assets used to successfully implement initiatives.

2. A development like the Project creates value and contributes to the well-being of community members through the various direct and spin-off opportunities that it can generate. Many of these opportunities have been identified in Section 7 ('Connections and Opportunities'). Developing an attractive business case will position the area and its constituents to capture those opportunities and the associated well-being for their residents.

3. The Collaborative needs to develop a business case that will attract residents and businesses to the Core Study Area. In developing that case however, they must be mindful of other communities that most likely will be competing for the same residents and businesses. Their key challenge therefore will be not only to make the business case for investment but also to create a value proposition that differentiates their area from competitors.

4. A key component of the value proposition is "Brand". This is a summative entity that must embody the fundamental beliefs underpinning the Collaborative, its purpose and its culture. Brand becomes identity – the more people that are proud and motivated by what is being pursued and accomplished, the stronger the brand becomes and the more compelling its overarching value proposition.

Desired Outcomes

1. Desired outcomes reflect "winning aspirations". These outcomes define what an organization seeks to achieve through the workings of its economic development strategy.

2. The Project is a moderate size long-term undertaking. Not only is it important at the local, provincial, and national levels but it is also important globally. From an economic development perspective, the Project needs to be considered as "a means to an end" and not as "an end to a means". The

Project presents a door to the future and a spectrum of potential initiatives/opportunities across Project stages.

3. The following target outcomes are suggestions:
    a. A showcase for innovation.
    b. A source of community pride and motivation.
    c. A net positive system of initiatives/opportunities.
    d. A world class success.

Next Steps

1. Implementing an economic development strategy represents a serious commitment of resources. Its success depends upon a dedicated team with shared goals and objectives mobilized from within the community.

2. The potential Partners need to confirm that they see merit in pursuing the development of an economic development strategy that leverages the Project and are prepared to initiate further efforts to that end.

3. The potential Partners need to develop, negotiate and refine a MOU that articulates their common ground, shared interests, objectives, and funding formula.

4. Once the Collaborative is established, it needs to develop connections to establish networks, select priority opportunities, develop a workplan, identify a timeline and assign responsibilities. In short: develop an implementation strategy that details how it intends to build its brand, move forward with priority opportunities, and create well-being.

1. Introduction

1.1 Background and Context

Since 2012, the Municipality of South Bruce (MSB) has been involved in a process of learning about the Nuclear Waste Management Organization's (NWMO) Adaptive Phased Management Project ('the Project') for the long-term management of Canada's used nuclear fuel. The two remaining siting areas in the process are the South Bruce Area and Ignace Area. The NWMO plans to complete all preliminary assessment work and to select one community/area to host the Project by 2024. Preliminary studies suggest that the Project can be implemented safely in the South Bruce area for a repository that will contain and isolate used nuclear fuel from people and the environment for the long timeframes required.

Further detailed studies are required to fully assess the potential impacts of the Project in the community and regionally. Building on previous work, engagement completed to-date, and the MSB's 36 Guiding Principles, the NWMO and the MSB are working together to prepare a suite of community studies which will be shared broadly with the community. The list of socio-economic community studies is included in **Appendix A**. These studies were undertaken by the NWMO or MSB, with some being joint efforts. The MSB has retained consultants (the GHD team) to develop a number of studies and to peer review others developed by the NWMO and their consultants (the DPRA Canada Inc. (DPRA) team). The information acquired through these studies is expected to help South Bruce leadership and residents make informed decisions about whether the Project is a good fit for their community, and if they are willing to consider hosting it and under what circumstances and terms.

This *Regional Economic Development Study* is one of the community studies being prepared. This Study is organized as follows:

- Context and Approach (**Section 2**)
- Situational Analysis (**Section 3**)
- The Strategy (**Section 4**)
- Desired Outcomes (**Section 5**)
- Enablers (**Section 6**)
- Connections and Opportunities (**Section 7**)
- Value Proposition (**Section 8**)
- Next Steps (**Section 9)**
- Summary Overview (**Section 10**)
- References (**Section 11**)

Sections 4 through 9 provide concepts and potential options to enhance positive outcomes and mitigate potential negative consequences related to economic development. They are presented by the authors to foster discussion only. They do not represent commitments or actions for the NWMO, the MSB, or other parties. The final decisions on actions and commitments will be made at a future date.

Note to Reader:

This and other community studies are preliminary and strategic in nature, all intended to identify possible consequences (e.g., for regional economic development) in the South Bruce Area on our current level of understanding of the Project. Using information known at this point in time, these community studies will describe a range of possible consequences that are the subject of specific and separate studies. For each possible consequence, potential options are offered to leverage opportunities and/or mitigate possible negative consequences/effects.

It is important to note that these community studies (developed collaboratively by the NWMO and the MSB) being investigated at this time are not the formal or final baseline or effects studies that will be part of the Impact Assessment (IA). Those studies will be completed at a later date if the Project is located in the area. However, these current studies will inform the effects studies that will be initiated at a later date.

These community studies are intended to support current dialogue between the MSB and the NWMO regarding a potential hosting agreement by:

a) Exploring in more detail the questions, aspirations and topics of interest expressed by the community through the Guiding Principles approved by the MSB following the project visioning process completed in the community;
b) Assisting the NWMO and the MSB in developing a deeper understanding of the community aspirations/values and to work with the MSB in identifying possible programs and commitments which ensure that the Project will be implemented in a manner that fosters the well-being of the community and area;
c) Advancing learning and understanding on topics of interest to the neighboring areas; and
d) Providing the community with information it has requested to help them make an informed decision in 2024.

The NWMO is committed to collaboratively working with the communities to ensure questions, concerns and aspirations are captured and addressed through continuous engagement and dialogue.

The NWMO will independently engage with the Saugeen Ojibway Nation to understand how they wish to evaluate the potential negative effects and benefits that the Project may bring to their communities.

1.2 Land Acknowledgement

It is acknowledged that the lands and communities discussed in this report are situated on the Traditional Territory of the Anishinabek Nation: The People of the Three Fires known as Ojibwe, Odawa and Pottawatomie Nations. The Chippewas of Saugeen and the Chippewas of Neyaashiinigmiing (Nawash), now known as the Saugeen Ojibway Nation, are the traditional keepers of this land and water. It is also recognized that the ancestors of the Historic Saugeen Métis and Georgian Bay Métis communities shared this land and these waters.

1.3 Scope and Purpose

Objectives for this study are described in the *Southwestern Ontario Regional Economic Development Study Work Plan* (DPRA, October 2021). The overall objective of the *Regional Economic Development Study* is to identify the economic development opportunities for the municipalities that are within the region of economic benefit of the Project. Specific objectives include:

1. *"Define the area that reflects the regional economy.*
2. *Describe the major contributors to the regional economy.*
3. *Describe the economic and commercial development opportunities associated with the Project.*
4. *Identify regional employers that could provide services to the Project.*
5. *Identify regionally based businesses that could supply equipment and material products to the Project.*
6. *Identify opportunities to work with the major contributors to the regional economy to leverage the regional service, equipment, and material product suppliers such that the needs of the NWMO and the regional businesses can result in the maximization of regional economic benefits."*

NWMO has responsibility for the completion of the *Regional Economic Development Study.* This Study was undertaken by Keir Corp., a subconsultant to DPRA, the prime consultant to the NWMO on this study.

1.3.1 Guiding Principles

The *Regional Economic Development Study* is relevant to MSB Guiding Principles (2020) #10, #13, #14, #21, #22 and #36:

- #10: "The NWMO will identify the potential for any positive and negative socio-economic impacts of the Project on South Bruce and surrounding communities and what community benefits it will contribute to mitigate any potential risks."
- #13: "The NWMO, in partnership with the Municipality, will develop a strategy and fund a program to promote the agriculture of South Bruce and the surrounding communities."

- #14: “The NWMO, in partnership with the Municipality, will develop a strategy and fund a program to promote tourism in South Bruce and the surrounding communities.”
- #21: “The NWMO, in consultation with the Municipality, will commit to implementing a local employment and training strategy with the objective of ensuring that the majority of employees for the Project are located within South Bruce and surrounding communities.”
- #22: “The NWMO will commit to implementing a procurement strategy for the Project that gives preference to the selection of suppliers who can demonstrate economic benefit to South Bruce and the surrounding communities.
- #36: “The NWMO must demonstrate to the satisfaction of the Municipality that the Project will benefit the broader region outside of the community of South Bruce, including local Indigenous communities.”

The *Regional Economic Development Study* provides information directly relevant to Principles #13 and #14, and contributes more generally to Principles #10, #21, #22 and #36. The *Regional Economic Development Study* provides information that the NWMO and MSB can use to inform agreements and funding arrangements in the future as part of negotiations of a draft hosting agreement and/ or subsequent studies/ discussions if the South Bruce Area is ultimately selected as the Project location. For clarity, development of these types of agreements/arrangements is not part of the objectives / work plan for this study.

1.3.2 Peer Review Approach

An earlier draft of this *Regional Economic Development Study* report was reviewed by MSB consultants according to their Peer Review Protocol. The Peer Review Protocol provides for a collaborative approach to conducting the peer review, with peer review activity occurring throughout the execution of the study. The *Regional Economic Development Study* has been produced by the NWMO and it incorporates a variety of inputs and findings from other community studies and ongoing discussions with the Municipality of South Bruce and its neighbours.

MSB consultants have jointly participated in developing data inputs and baseline conditions.

Peer review has been undertaken on the framing and scope of the study and the draft study report.

For the *Regional Economic Development Study*, the peer review was led by Deloitte LLC (formerly MDB Insight Inc.).

1.3.3 Spatial Boundaries

1 Three areas have been used to frame this study:
   a. Regional Study Area
   b. Local Study Area
   c. Core Study Area

The three study areas are described in more detail in Section 3.2, below.

1.3.4 Temporal Boundaries

1 Three temporal boundaries define the critical horizons of the Project for this study.
   a. Pre-Construction – 2028 to 2032
   b. Construction – 2033 to 2042
   c. Operation – 2043 to 2088

2 The pre-construction phase of the Project will be closely associated with permitting and licensing activities and it will also involve both on-site and off-site initiatives. In the latter case an office and Centre of Expertise will be made operational. The NWMO workforce strategy will entail a combination of new employee hires and relocation of existing employees.

3 The construction phase of the Project will begin in 2033 once permits and licenses have been obtained. It will run for 10 years.

4 Following the completion of construction, site operations will commence in 2043 and continue to 2088.

1.3.5 Planning Assumptions – Workforce, Population, Housing and Employment

1 The community studies use the following planning assumptions for Project workforce by phase, and projections for population, housing, and employment for the five local municipalities:
   - Municipality of South Bruce (including Teeswater, Mildmay and Formosa)
   - Township of Huron-Kinloss (including Ripley and Lucknow)
   - Municipality of Brockton (including Walkerton)
   - Municipality of Morris-Turnberry
   - Township of North Huron (including Wingham)

2 These five municipalities comprise the 'Core Study Area' used in the *Labour Baseline*, *Workforce Development*, *Housing Needs and Demand Analysis*, and *Regional Economic Development studies*.

Project Workforce

1 The three Project phases are:
- Pre-Construction (2023 to 2032)
- Construction (2033 to 2042)
- Operations (2043 and beyond; does not include monitoring and decommissioning phases)

2 The workforce associated with the Project phases is described in more detail in Section 2.2.

Population, Housing & Employment Projections

1 The Municipality of South Bruce (metroeconomics, 2022) prepared base case ('without the Project') projections for population, housing, and employment for the five core area municipalities. A corresponding set of incremental 'anticipated Project effects' projections for each of these demographics for the same municipalities was also prepared (metroeconomics, 2022) utilizing Municipality of South Bruce Project-related growth targets. Tables 1 and 2 present the projections.

Table 1: Base Case Projections

			2021	2031	2041	2046
Population	South Bruce		6,250	7,420	8,400	8,760
	Other Core Area Municipalities	Huron-Kinloss	7,860	9,340	10,570	11,040
		Brockton	10,130	11,960	13,460	14,010
		North Huron	5,150	6,040	6,760	7,010
		Morris-Turnberry	3,940	4,690	5,330	5,570
		Sum of Other Core Area	27,080	32,030	36,120	37,630
	Total Core Area		33,330	39,450	44,520	46,390
Dwellings	South Bruce		2,360	2,850	3,200	3,300
	Other Core Area Municipalities	Huron-Kinloss	3,050	3,540	3,940	4,080
		Brockton	4,130	4,830	5,400	5,620
		North Huron	2,160	2,560	2,840	2,950
		Morris-Turnberry	1,330	1,520	1,660	1,690
		Sum of Other Core Area	10,670	12,450	13,840	14,340
	Total Core Area		13,030	15,300	17,040	17,640
Employment	South Bruce		1,570	1,730	1,880	1,950
	Other Core Area Municipalities	Huron-Kinloss	1,860	2,040	2,290	2,410
		Brockton	3,870	4,380	4,970	5,270
		North Huron	2,520	2,800	3,160	3,350
		Morris-Turnberry	1,010	1,130	1,240	1,290
		Sum of Other Core Area	9,260	10,350	11,660	12,320
	Total Core Area		10,830	12,080	13,540	14,270

Source: metroeconomics (2022)

Table 2: Anticipated Project Effects Projections

			2021	2031	2041	2046
Population	South Bruce		-	200	640	780
	Other Core Area Municipalities	Sum of Other Core Area	-	200	640	1,020
	Total Core Area		-	400	1,280	1,800
Dwellings	South Bruce		-	70	200	250
	Other Core Area Municipalities	Sum of Other Core Area	-	70	220	350
	Total Core Area		-	140	420	600
Employment	South Bruce		-	230	730	840
	Other Core Area Municipalities	Sum of Other Core Area	-	40	170	420
	Total Core Area		-	270	900	1,260

Source: metroeconomics (2022)

2 For this study, the projections were incorporated in the analysis.

2. Context and Approach

2.1 General Approach

1. Regional economic development is one of 24 socio-economic community studies being developed by NWMO and the MSB. The overarching objective of this study is to identify economic development opportunities associated with the Project that can be realized by area municipalities and businesses.

2. This Study is not a standalone document but is built on a foundation of other economic community studies that have been recently prepared, specifically:

   - The *Labour Baseline Study* (Keir Corp., 2022a)
   - The *Workforce Development Study* (Keir Corp., 2022b)
   - The *Housing Needs and Demand Analysis Study* (Keir Corp., 2022c)
   - The *Aggregate Resources Study* (Keir Corp., 2022d)

3. Moreover, this study also provides inter-connections to other community studies that are underway and more specifically focused on individual economic sectors and/or the MSB itself. Several of the other community studies prepared by MSB are directly relevant to this *Regional Economic Development Study*:

   - *Municipality of South Bruce Economic Development Project Effects and Strategy* (Deloitte LLC, 2022a)
   - *Economic Development Study on Youth* (Deloitte Canada, 2022)
   - *Local Hiring Effects Study and Strategy* (Deloitte LLC, 2022b)
   - *Agriculture Business Impact Study* (Deloitte LLC, 2022c)
   - *Municipality of South Bruce Tourism Industry Effects Study* (Deloitte LLC, 2022d)

4. As part of the community studies, interviews were conducted with economic development organizations, area employers, planning officials, municipal administrators, and local developers to gain insight into labour/workforce, housing characteristics and issues, and regional economic development in the Local and Core Study Areas. The inventory of knowledge holders interviewed is set out in **Appendix B**.

5. In addition, in October 2021 the *Regional Economic Development Study Work Plan* was discussed at one of the monthly Project meetings with the CAOs/staff of four of the municipalities in the Core Study Area (South Bruce, Huron-Kinloss, Brockton, Morris-Turnberry and North Huron[1]).

[1] *In February 2022, the Municipality of Morris-Turnberry began to participate in these meetings.*

2.2 The Project

1. An enormous volume of information can be retrieved on the Project through the NWMO website (www.nwmo.ca) and recent documents such (Heimlich, 2021; Naserifard et al, 2021; NWMO 2021). No attempt is made here to provide even a brief summary of the information that is available. The points set out below are simply listed for consideration in the context of subsequent discussions around economic development.

   - The Project is a large world scale undertaking with a current-day value of approximately $26 billion.
   - The Project will handle all of Canada's used nuclear fuel produced by its existing fleet of reactors.
   - The Project will involve two facilities – the deep geological repository site and an off-site office/Centre of Expertise complex.
   - The repository site occupies approximately 1,500 acres in northwest South Bruce in close proximity to the eastern boundary of Huron-Kinloss.
   - Approximately 200 acres of the site will be occupied by buildings and approximately 40 acres will be used for excavated rock storage.
   - The off-site facility will have an administrative office and the Centre of Expertise.
   - At the moment the off-site facility is contemplated for location in South Bruce.
   - The overall Project time-line spans 167 years but critical dates for the purposes of this study area are:
     - 2024: one of two locations (Ignace Area or South Bruce Area) will be selected to host the Project.
     - 2028: During the first Project wave, there are approximately 200 NWMO staff in the Project workforce, both on-site and at an off-site office facility. The strategy will entail a combination of new employee hires and relocation of existing employees.
     - 2033 to 2042: the deep geological repository and associated on-site facilities will be constructed
     - 2043: the repository will commence operations with the receipt of used nuclear fuel from source facilities.
     - The approximate average annual direct workforce compliments both on-site and off-site for the 3 phases are shown in Table 3.

Table 3: Projected Workforce by Phase – Direct Jobs

		NWMO Staff	Surface Trades	Underground Trades	Total
On-site	Pre-construction (2028)	20	-	-	20
	Construction (2033)	40	300	130	470
	Operations (2043)	510	10	60	580
Off-site	Pre-construction (2028)	180	-	-	180
	Construction (2033)	170	-	-	170
	Operations (2043)	120	-	-	120
Total	Pre-construction (2028)	200	-	-	200
	Construction (2033)	210	300	130	640
	Operations (2043)	630	10	60	700

Source: NWMO (October 2021)

- In addition to the direct work force compliment there will also be indirect and induced jobs generated by the Project.
- Indirect jobs are associated with the supply of goods and services to the Project, and induced jobs are those generated through the income spending of persons holding the direct and indirect jobs.
- Approximate estimates of direct and induced job creation during the three phases are shown in Table 4.

Table 4: Average Annual Jobs Across Project Phases

	Direct	Indirect	Induced	Total
Pre-construction	200	480	200	880
Construction	640	830	430	1,900
Operations	700	210	270	1,180

Source: Keir Corp with data from NWMO (2021)

2.3 Community Aspirations for Economic Development

1. The Guiding Principles developed by the MSB (2020) that are relevant to the *Regional Economic Development Study* are described in Section 1.3.1 above). These principles touch on several topics related to community aspirations for economic development.

2. The MSB has prepared the *Municipality of South Bruce Economic Development Strategy Update* (MDB Insight, 2021). That Strategy was prepared assuming normal growth, not including the Project. The three strategic objectives are 'Foundations and Follow-up', 'Agri-Business Reboot', and 'Village Revival'. The *Municipality of South Bruce Economic Development Project Effects and Strategy* (Deloitte LLC, 2022a) is a community study that considers the potential opportunities associated with the Project. As described above in the general approach (Section 2.1), there are other community studies that are involved with research and analysis on certain topics, for example, the *Agriculture Business Impact Study* (Deloitte LLC, 2022c), the *Local Hiring Effects Study and Strategy* (Deloitte LLC, 2022b), *Economic Development Study on Youth* (Deloitte Canada, 2022), and *Municipality of South Bruce Tourism Industry Effects Study* (Deloitte LLC, 2022d). It is expected that these will identify development opportunities that will benefit the community. These other studies are noted but not considered in detail in this report. The *Housing Needs and Demand Analysis* (Keir Corp., 2022c) and *Workforce Development* (Keir Corp., 2022b) studies also have put forward thoughts and initiatives to generate positive outcomes.

3. South Bruce has indicated its expectations for housing capture associated with direct and indirect Project activities (metroeconomics, 2022). Additionally, South Bruce has recently entered into a Project-focused relationship with four surrounding municipalities (Brockton, Huron-Kinloss, North Huron and Morris-Turnberry) to cooperatively explore and realize potential opportunities presented by the Project. Table 5 sets out the municipal housing capture ambitions associated with the Project over the time frame 2031 to 2046.

Table 5: Project Associated Dwelling Capture by Municipality – 2031, 2041 and 2046

	2031	2041	2046
South Bruce	70	200	250
Other Core Area Municipalities	70	220	350

Source: metroeconomics (February 2022)

5. In addition to the economic development aspirations of South Bruce it is important to also look beyond the Municipality and the Core Study Area to understand the aspirations of others at a broader level.

6. The Bruce County Economic Development Department's *Economic Development Strategic Plan 2022-2026* (2022) highlights that the County will pursue business development through the three following foci and associated initiatives:

a) Business Foundations
   - o Support business growth and development.
   - o Retain and expand businesses.
   - o Anticipate supply chain opportunities.

b) Outreach and Education
   - o Support entrepreneurial growth and development.
   - o Reward business diversification.

c) Sector Development and Enhancement
   - o Support tourism business development.
   - o Support clean energy industry and partners
   - o Support enhancement of the agricultural sector.

7. Grey County's *Economic Development Strategy* notes that their Development Vision (McSweeney and Associates, 2016/17) is empowered by two main components – people and process. The Strategy articulates that through real collaboration and true partnerships the County together with municipal and community partners will be fully engaged and working together to continually create a positive environment where businesses and investors have the information, the resources and the support needed to succeed. The Strategy is hinged around seven themes:

   a) Becoming investment ready.
   b) Creating a business friendly environment.
   c) Ensuring key infrastructure is in place.
   d) Developing Grey's workforce.
   e) Better communicating and marketing Grey's greatness.
   f) Tourism.
   g) Agriculture, farms, and local food.

   More recently, Grey County released its *Investment Attraction Strategy 2022-2025* (thinkCOMPASS, 2022) that focuses on sectors and foreign markets that generate a high return on investment, align with provincial and federal government priorities, leverage local strengths, and bring broad economic benefits to improve sector diversity throughout the County. The opportunities that are of particular relevance to the County include:

   a) Agri-food businesses.
   b) Energy including Hydrogen, Nuclear Supply Chain and Storage.
   c) Isotope Exports.
   d) Knowledge-Based Companies.
   e) Tourism destination investment.

   The County's strategy is to target corporations that can strengthen and diversify the supply chain that already exists with the County's key clusters; that can bring knowledge intensive resources to leverage and

stimulate innovative R&D; and would like to diversify into less volatile markets.

8. The Municipality of Kincardine is home to Bruce Power, and the seat of the nuclear industry in Bruce County. A very large portion of the used nuclear fuel that will be handled by the NWMO's Project will be sourced from the Bruce Nuclear Generating Station. The Municipality's *Economic Development Strategy 2020-2025* (MDB Insight,2020) prioritizes six key objectives:

   a) Leverage investments in the nuclear sector.
   b) Improve investment readiness.
   c) Increase tourism marketing and product development.
   d) Support business expansion and retention with a focus on small business.
   e) Develop housing and supports for residents and population growth
   f) Support agriculture, agribusiness and value added with a focus on small scale production.

9. Huron County is the most agriculturally productive county in Ontario. Its *Economic Development Plan (2016-2020)* puts a focus on the development of specific opportunities within the following seven key growth the sectors:

   a) Agriculture and agri-food.
   b) Tourism.
   c) Education.
   d) Manufacturing.
   e) Health Care.
   f) Information technology.
   g) Retail and Service Industries.

   Desired outcomes for initiatives in these sectors include:

   a) Solid value propositions for future investment.
   b) Greater County, municipal and private sector cooperation.
   c) Increased optimism about the future.
   d) Strong public-private partnerships.
   e) A growing and sustainable tax base.
   f) Population growth.
   g) More business investment and job creation.

10. The Wellington County *Economic Development Strategic Plan* (Miller Dickinson Blais, 2012) expresses the vision:

    "Wellington County will be a collaborative community that protects and enhances its natural and cultural heritage assets while supporting the longer term economic prosperity of its residents and business community."

    Four goals are put forward in the Plan:

a) Increase the competitiveness and success and of Wellington businesses.
b) Build a strong regional profile and brand.
c) Create a community where people want to live, and entrepreneurs want to do business.
d) Develop lasting partnerships that advance the economic sustainability of the County

2.4 Going Forward

1. Economic development studies can take on a variety of forms. The approach adopted in this study is to provide a situational analysis in Section 3, followed by a strategic plan for the Core Study Area Municipalities (South Bruce, Huron-Kinloss, Brockton, North Huron and Morris-Turnberry) to collectively pursue regional economic development opportunities. This Study is a strategic "game plan". It maps out the ways and means for the Core Study Area Municipalities to achieve desired outcomes. The simple 'strategy cascade' diagram (see Figure 1) developed by Lafley and Martin (2013) initiates the plan by posing five key questions:

a) What are your winning aspirations?

This is a large project vital to Canada and unique at a global scale. The aspirations for this Project in your backyard need to be courageous. They need to be big enough to drive new thinking, force innovation, work for the long term and demonstrate investment in the future. They need to be fact based and net positive for you, your children, and the planet. You need to lead; you cannot follow.

b) Where will you play?

This Project enables you to play at home and abroad. Your local playing field is where you live. Bring well-being in every way you can to your local area. Make your constituents proud and inspired. At the same time, this Project gives you the opportunity to step out on the world stage to show what you are accomplishing and how you are dealing with challenges and opportunities.

c) How will you win?

Achieving desired outcomes requires a game plan, teaming and systems thinking. In economic development many pieces are interconnected. Net positive should be the target and end point for all initiatives. Hard work, focus and authenticity are required to create change as are decision making and flexibilities around trade-offs.

d) What capabilities and relationships must be in place?

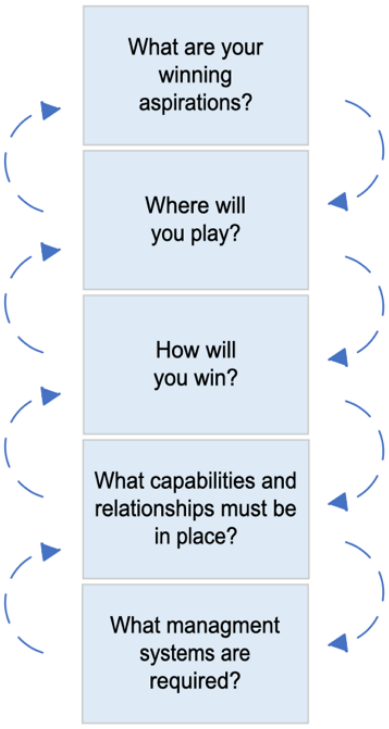
Regional economic development is a significant undertaking. It requires a broad vision and the resources and capabilities to explore opportunities, make connections and make things happen. Small organizations may be challenged to marshal the skills and capabilities

to be successful on a broad front. It is therefore a prudent step to understand your own core capabilities and those of others. An aligned collaborative approach makes an organization part of a team. Relative to an individual, the team can play on larger fields, bring more skills and capabilities to the table, attract bigger attention, and shoot for higher outcomes.

e) What management systems are required?

Defining aspirations, determining where to play, how to be successful and defining the capabilities required may all be for naught if management systems are not in place to support the choices and capabilities. To be successful, an organization, particularly a collaborative organization, needs a robust process for creating, pursuing, reviewing, and communicating the game plan(s). Management systems need to be in place to ensure effective, coordinated action throughout the organization.

Figure 1: Strategy Cascade



Source: Lafley and Martin (2013)

2. Today, embarking upon an economic development program cannot ignore the profound impact that the Covid-19 Pandemic is having on the global economic landscape. Any assumptions made prior to 2020 regarding markets, sectors and investment activity need to be reassessed within a new paradigm filled with considerable uncertainty.

3. There has been no shortage of prognostications from respected organizations and analysts regarding the impact that Covid-19 will have on the economy, investment, and the performance of markets and sectors. The speed of the economic downturn took most analysts by surprise, as did the economic rebound in selected sectors. Most analysts will agree that the global economy is changing but how that change will impact households, businesses, supply chains and investment patterns is only slowly being revealed.

4. The Pandemic has changed the way people and companies do business and make decisions. Some knowledge workers are looking for jobs with companies that are adopting new more flexible employment models that offer a working remote option. Businesses - especially those with lengthy supply chains - are rethinking their networks as the economy recovers, opting for more local suppliers to shorten them and reduce their risk.

5. Labour markets have also been significantly influenced. Vulnerable industries like manufacturing, food and beverage processing, retail and accommodation have suffered major job losses. On the other hand, more knowledge-intensive industries focused on information technology, financial and professional services have experienced employment stability and in some cases growth.

6. Many industries such as tourism, food and accommodation that are trying to rehire their work force, are finding it difficult because former employees are unwilling to work for minimum wage or deal with job uncertainty. These industries are having to rethink their business model as workers are being attracted to employment elsewhere or retraining to realize opportunities in other more stable businesses and careers.

3. Situational Analysis

3.1 Purpose and Perspectives

1 This section provides a comparative analysis of the Regional, Local and Core Study Areas against key economic indicators to better understand each area's capacity to service and support the Project during construction and operations. To maintain continuity, the study areas are the same as those used in other economic community studies reports on *Labour Baseline*, *Housing Needs and Demand Analysis*, and *Workforce Development*.

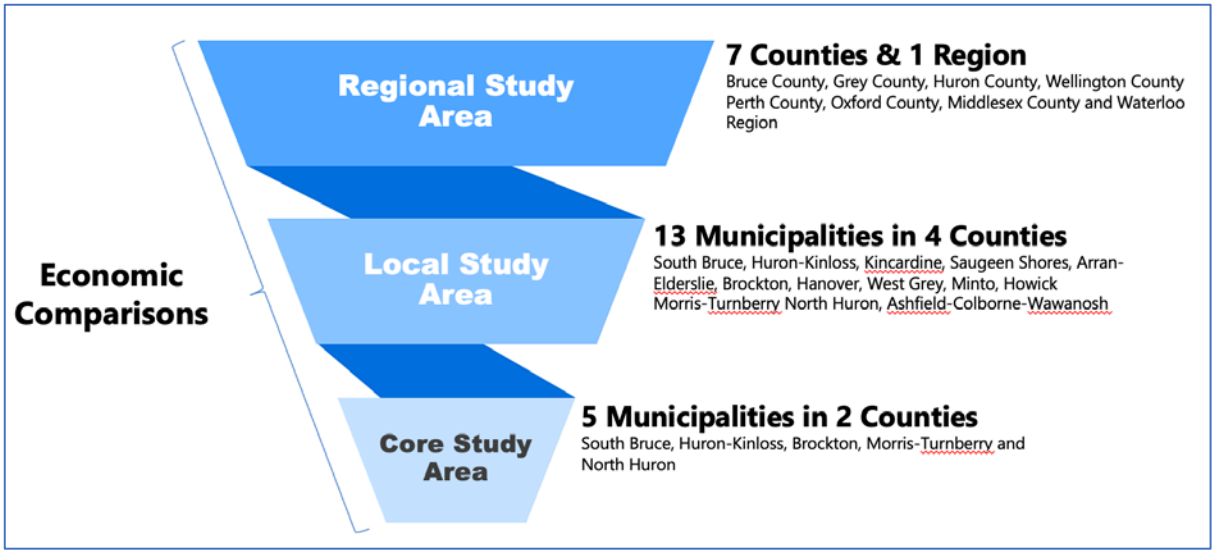
2 The following analyses and discussions examine those industry sectors that best reflect the characteristics of the goods and services supply chain required by the Project as identified by NWMO. The indicators that were considered include the availability of labour, the number and concentration of companies within each sector, and their purchasing patterns. The analysis examines each area's capacity to support the needs of the Project and also identifies opportunities where the Core Study Area can optimize benefits from it.

3 **Appendix C** in this document supports this chapter of the *Regional Economic Development Study* and provides more detailed tables and notes for readers that seek additional information.

3.2 The Study Areas

1 Other economic community studies that have preceded this report have all been based on three study areas: the Regional Study Area (RSA), the Local Study Area (LSA) and the Core Study Area (CSA) as described by Figure 2 below which provides an overview of their make-up.

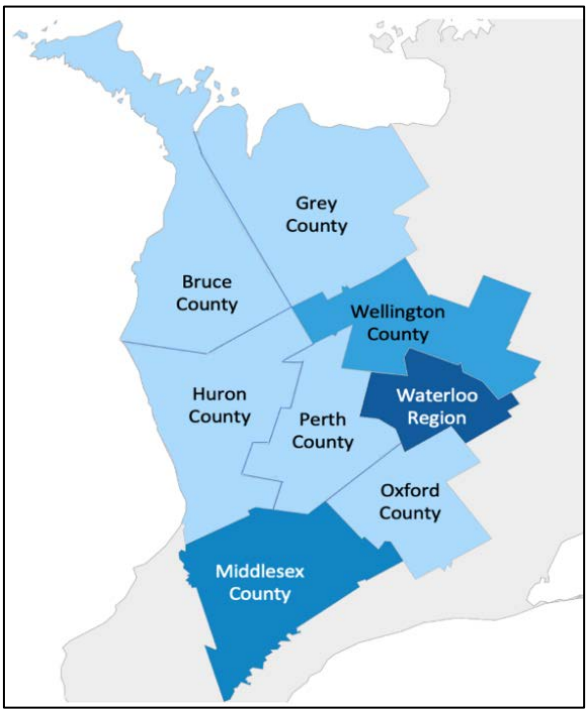
Figure 2: Overview of Study Areas



Source: Keir Corp (2022)

2 The three maps that follow provide a more detailed understanding of these study areas and how they are interrelated with one another, and in the case of the LSA and CSA a sub-set of a larger area.

Figure 3: Regional Study Area



3 The **RSA** shown in Figure 3 is all roughly within a 2-hour drive of the Project, and has a current population of 1.8 million people. The area includes several large municipalities such as London, Waterloo, Kitchener, and Guelph with highly diversified economies. Not only do they have a strong social and educational infrastructure, they also collectively have a particular strength in advanced manufacturing.

4 The **LSA** shown in Figure 4 steps down from the RSA and is roughly within a 1-hour drive of the Project. The communities that make up this area are predominately rural, although Bruce Power has attracted significant investment into the area related to the Major Component Replacement (MCR) Project to refurbish the Bruce Nuclear Generating Station. While this area has seen substantial growth, its current population of 110,000 is significantly smaller than the Region's.

Figure 4: Local Study Area

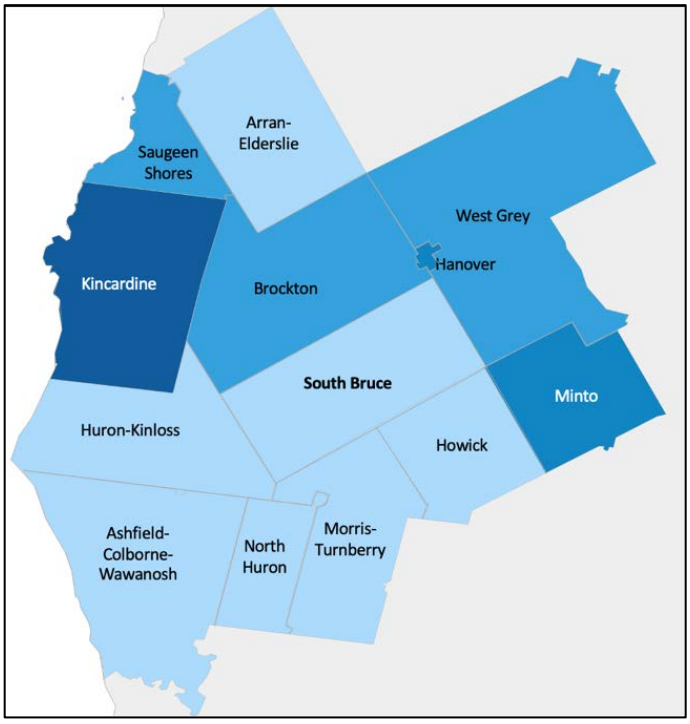
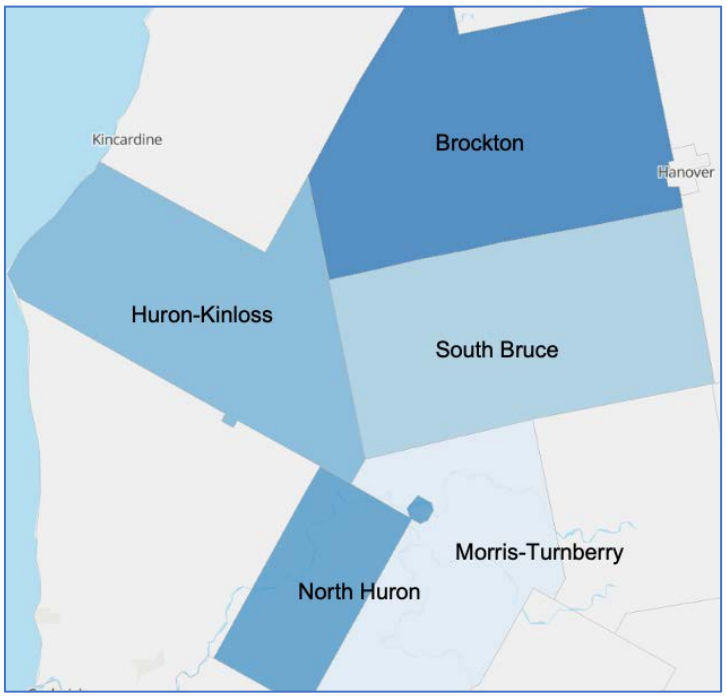


Figure 5: Core Study Area



5 The **CSA** shown in Figure 5 steps down from the LSA, and is again predominately rural; it has a current population of 33,000 people which represents about 30% of the population of the LSA but less than 1% of the population of the RSA. While this area does have some industry which is related to the nuclear sector, it is mostly focused on supporting the area's strong agricultural sector and supplying parts to other sectors including automotive.

3.3 Economic Overview

1 The economic predominance of the RSA relative to the LSA and CSA is demonstrated in Table 6 in terms of number of jobs and companies. The strength of the RSA is largely due to the influence of Wellington, Middlesex, Oxford, and Waterloo. All four of these municipalities have highly diversified economies, a large pool of skilled knowledge workers, and a concentration of companies in advanced manufacturing, food processing and information technology.

Table 6: Study Area Comparison

	Regional Study Area	Local Study Area	Core Study Area
Population	1,823,000	110,300	33,300
Jobs	922,800	47,900	12,300
Companies	185,200	9,500	3,440
Output Sales ($ M)	$ 250,160	$ 12,682	$ 2,142
Wages ($ M)	41,452	2,283	391
Supply Chain Purchases ($ M)	$ 93,096	$ 4,686	$ 926
Value-Add ($ M)	$ 115,612	$ 5,713	$ 825

Source: Keir Corp using data from Emsi Burning Glass (2021)

2 The number of jobs and companies that are located in the LSA and CSA drop-off dramatically when compared to the Region. The LSA accounts for only 5% of the jobs and 5% of the companies, while the CSA only captures 1% of the jobs and less than 2% of the companies.

3 The predominance of the RSA is further demonstrated by its contribution to value-add. At the RSA level, the economic inputs (wages + supply chain purchases) are valued at $135 billion, while the outputs (sales) are $250 billion resulting in a roughly indicative value-add of $115 billion.

4 Not surprisingly, the contribution to value-add by the LSA and CSA drop off dramatically. At the LSA level, the economic inputs are valued at $7 billion and the outputs at $13 billion, resulting in a roughly indicative value-add of $6 billion. At the CSA level the economic inputs are valued at $1.3 billion and the outputs at $2.1 billion resulting in a roughly indicative value-add of $0.8 billion.

3.3.1 Labour Force

1 As demonstrated in Table 7 below, The RSA relative to the other study areas accounts for the bulk of the labour force. This is not surprising since this Region includes the three counties, Wellington, Middlesex, and Oxford plus the Region of Waterloo all of which have large populations and well-developed economies. Their economies are all highly diversified with large, advanced manufacturing sectors that include a number of significant companies involved with machinery, robotics, automotive assembly and parts and power generation equipment manufacturing.

Table 7: Comparison of Key Labour Force Indicators by Study Area

Key Labour Force Indicators	Regional Study Area	Local Study Area	Core Study Area
Labour force population	1,500.000	90,300	27,000
Active Participants	981,000	57,600	18,100
Number Employed	908,000	54,400	17,200
Participation Rate	66%	64%	67%
Unemployment Rate	7.5%	5.6%	5.3%

Source: Manifold 2020

2 By comparison, the labour force and related characteristics such as active participants and number employed is much smaller within the LSA. Nevertheless, the MCR Project at the Bruce Nuclear Generating Station has attracted a number of companies into the area that are part of the nuclear supply chain servicing the utility sector. The growth in this sector has also attracted a highly skilled and knowledge intensive labour force.

3 The CSA by comparison accounts for about a third of the labour force and related characteristics in the LSA. In total, the numbers are much smaller than the RSA as a whole and largely reflect the predominately rural character of this area.

4 In terms of Labour Participation, all three study areas are relatively similar although the lower rate at the LSA is likely due to the larger number of retirees in several of the shore-line communities that make-up the area. The unemployment rate is higher in the RSA relative to both the LSA and CSA, most likely reflecting a larger number of unemployed persons looking for work in a larger pool of employment opportunities.

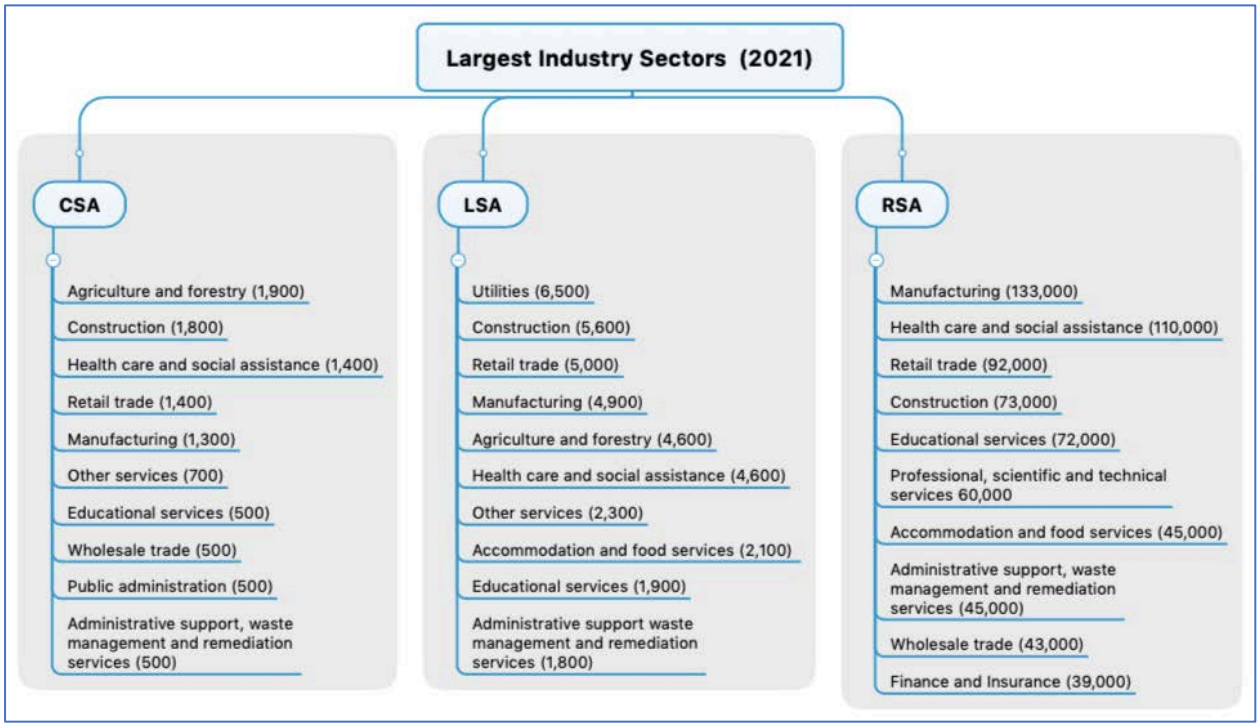
3.3.2 Largest Industry Sectors

1 Figure 6 sets out the 10 largest industry sectors in each of the study areas. In the RSA Manufacturing dominates; in the LSA it is Utilities; and in the CSA it is Agriculture and Forestry. Construction is a key sector in all of the study areas, but the magnitude difference is significant. The Construction

sector in the RSA is 13 times the size of the sector in the LSA and over 41 times the size of the sector in the CSA.

2 Total employment numbers for the top ten sectors in the RSA, LSA and CSA are respectively 712,000, 39,300 and 10,500. The latter provides a rough indication of the scalar difference between the economies of the three study areas. The portfolio of sectors in each study area provides a rough sense of the area's economic complexion. In general, the RSA shows an orientation towards secondary and tertiary sectors. The LSA character is also defined by jobs in secondary and tertiary sectors, but with some representation in the primary sector with Agriculture and a lessor emphasis on Personal services. In the CSA, the primary and secondary sectors set the tone for the area economy with some shadowing also provided in the tertiary sector with Health Care and Social Assistance services.

Figure 6: Study Area Comparison of Ten Largest Industry Sectors (2021)



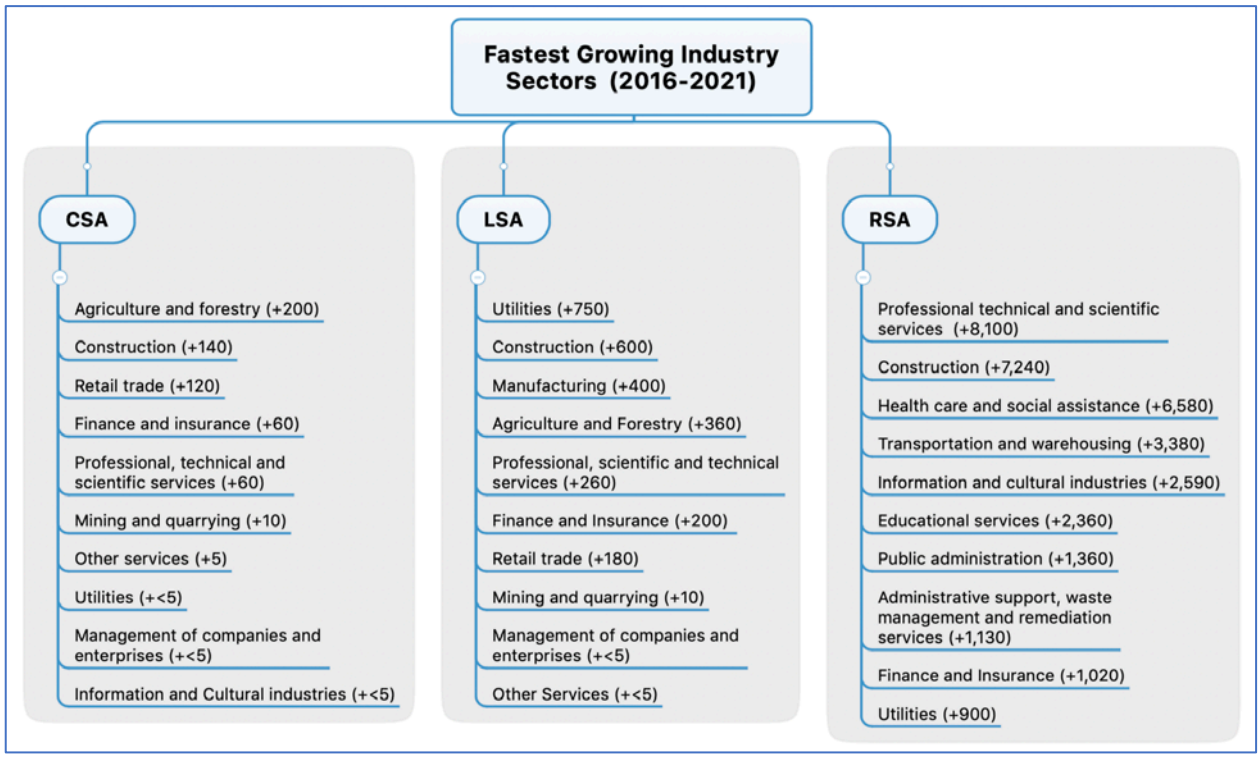
Source: Keir Corp using data from Emsi Burning Glass (2021)

3.3.3 Fastest Growing Industry Sectors

1 The fastest growing industry sectors in each of the three study areas are set out in Figure 7. Tertiary sectors account for the majority of growth in the RSA. Growth in the LSA is primarily among secondary sectors and in the case of the CSA, the primary and secondary sectors of the economy rise to the fore.

2 Interestingly all three of the study areas have construction as the second fastest growing industry sector. Both the LSA and CSA register Agriculture and Forestry in the top four sectors with it topping the list in the CSA.

Figure 7: Study Area Comparison of Ten Fastest Growing Industry Sectors (2016 - 2021)



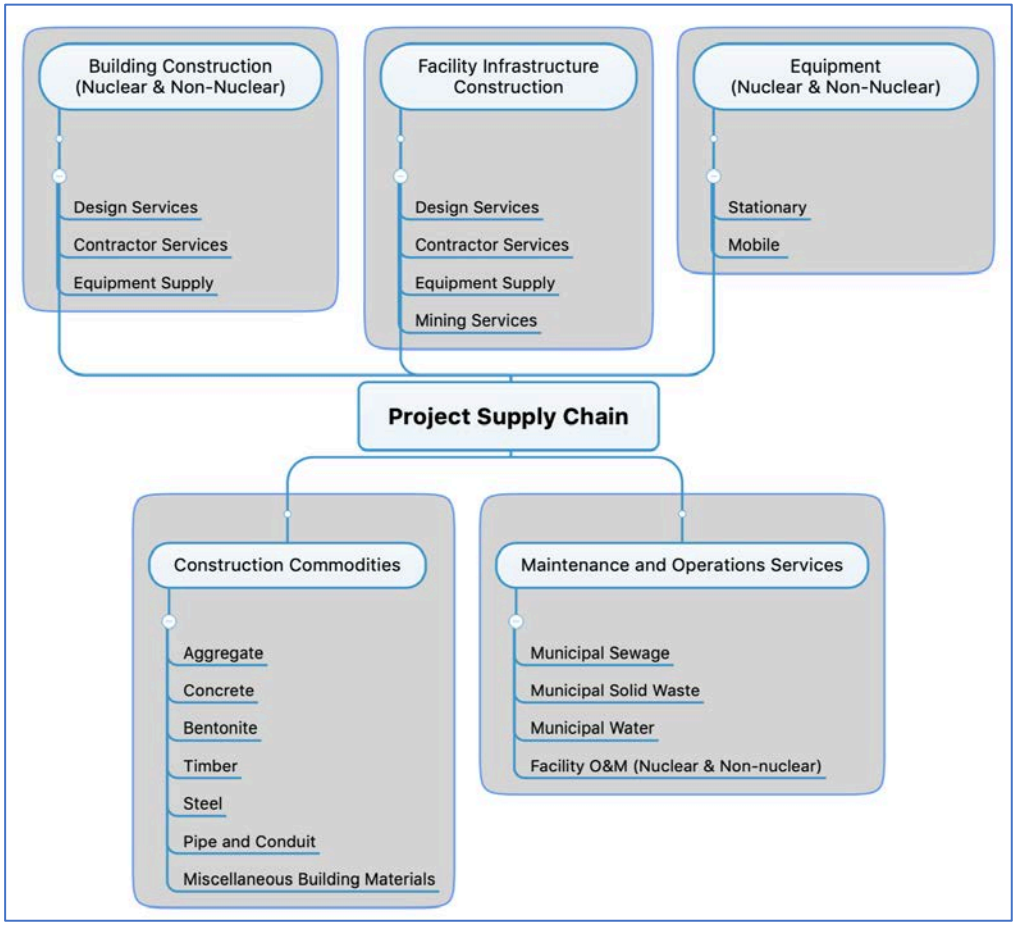
Source: Keir Corp using data from Emsi Burning Glass (2021)

3.3.4 Project-Related Supply Chain Analysis

1 The project supply chain in Figure 8 was prepared using the APM Project Supply Chain prepared for South Bruce (Deloitte LLC and GHD Ltd., 2022) based on their review of the Community Studies Planning Assumptions (NWMO, 2021) and discussions with NWMO. The focus of this supply chain is on major component categories and the associated goods and services that need to be supplied to the Project during its various phases.

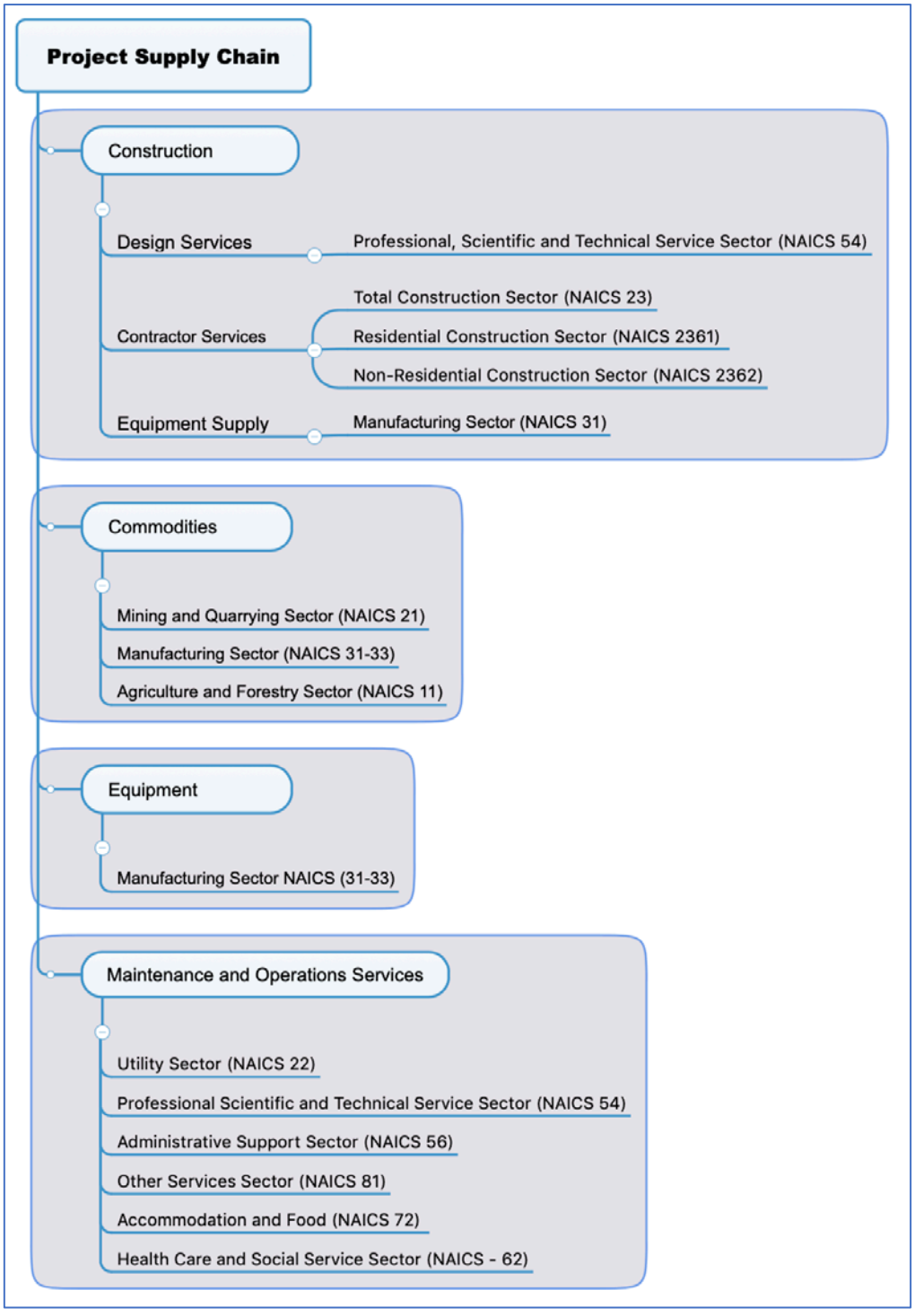
2 To develop a better understanding of the capacity of the study areas to supply the goods and services required by the Project, key industry sectors were selected that best reflect the supply chain categories (refer to Figure 9, below). Key economic indicators were then developed for each industry sector by study area. This enabled a comparative analysis that examined each area's relative capacity and strength to service and supply the needs of the Project.

Figure 8: Outline of the Project Supply Chain Requirements



Source: Keir Corp using data from MDB Insight (2022)

Figure 9: Project Supply Chain Requirements by Industry Sectors



Source: Keir Corp using data from Deloitte/GHD (2022) and Emsi Burning Glass (2021)

Note: The selected sectors are aligned with The North American Industry Classification System (NAICS) the numbers associated with the NAICS reflect 2 digit and sometimes 4 digit sector breakdowns.

3.3.5 Analysis of Key Economic Indicators

3.3.5.1 Industry Concentration

1 Table 8 sets out location quotients (LQ)[2] for the industry sectors that are affiliated with the Project supply chains put forward by Deloitte/GHD (2022) While LQs do not reflect the whole story behind industry capability across the study areas, nevertheless they do provide a barometer of where competitive advantage might lie.

2 The RSA shows the strongest concentration for most sectors however, the Agriculture and Utility sectors are notable exceptions. The LSA shows exceptional concentration in Utilities and also has a very strong concentration in Non-residential Construction. The CSA shows marked strength in Agriculture, Residential Construction, and Other Services. Also of note for the CSA is the fact that it has the highest LQ across the 3 study areas for Mining and Quarrying.

Table 8: Location Quotients by Industry and Study Area

	Regional Study Area	Local Study Area	Core Study Area
Total Construction Sector	**1.77**	1.59	1.29
Residential Construction Sector	1.06	1.38	**1.94**
Non-residential Construction Sector	0.89	**1.94**	0.23
Total Manufacturing Sector	**1.77**	1.25	1.29
Agriculture and Forestry Sector	1.49	4.91	**7.78**
Mining and Quarrying Sector	0.22	0.19	**0.42**
Utility Sector	1.63	**21.22**	0.73
Professional Scientific and Technical Service Sector	**0.86**	0.43	0.35
Administrative Sector	**0.96**	0.73	0.77
Accommodation and Food Sector	**0.89**	0.78	0.67
Other Services	0.95	1.12	**1.39**
Health Care	**0.94**	0.76	0.91

Source: Keir Corp using data from Emsi Burning Glass (2021)

Note: Colour Key: Green=LQ above 1.2; Yellow=LQ between 0.80 and 1.2; Red=LQ below 0.8
Bold indicates area with highest location quotient for sector

[2] *Location quotients indicate job concentrations in industry sectors relative to what would be expected across Canada. A value of 1 is the expected benchmark. Higher values show concentrations above the benchmark and lesser values indicate weaker concentrations below the benchmark.*

3.3.5.3 Employment Distribution

1 Table 9 provides an indication of the distribution of employment across the three study areas by key industry sector. The RSA not surprisingly accounts for 90% or more of the employment in most of the key industry sectors. This area is especially strong in the Total Manufacturing, Professional Scientific and Technical Services, Administrative Support and Waste Management Services and Health Care and Social Assistance Services.

2 In the Agriculture sector, the LSA accounts for larger percentage and in the Utility sector a significantly larger percentage of the employment relative to other sectors. For the most part, the CSA accounts for 2% or less of the jobs, except for Agriculture and Mining where it demonstrates some notable strength especially in Agriculture and Forestry.

Table 9: Percent Distribution of Jobs by Industry Sector and Study Area

Industry Sector	Regional Study Area (%)	Local Study Area (%)	Core Study Area (%)
Total Construction	90	8	2
Residential Construction	91	7	2
Non-residential Construction	92	7	1
Total Manufacturing	95	4	1
Agriculture & Forestry	76	17	7
Mining & Quarrying	92	5	3
Utilities	31	68	1
Professional, Scientific & Tech. Services	96	3	1
Admin. Support & Waste Management Service	95	4	1
Accommodation & Food Service	93	6	1
Other Services	92	6	2
Health Care & Social Assistance Services	95	4	1

Source: Keir Corp using data from Emsi Burning Glass, 2021

3.3.5.4 Distribution of Companies

1 Table 10 examines the distribution of companies by key industry sectors across all three study areas. While the RSA accounts for over 90% of the companies in most industry sectors, it shows strength in Total Construction, Administrative Support and Waste Management Services, and Health Care & Social Assistance Services.

2 The LSA, largely reflecting the purchasing policy established by Bruce Power accounts for 21% of the companies in the Utility sector. It also demonstrates strength in Agriculture and Forestry, and Non-residential Construction.

3 The CSA demonstrates strength in the Utilities, Agriculture and Forestry, and Mining and Quarrying sectors relative to its performance in other sectors.

Table 10: Percent Distribution of Companies by Industry Sector and Study Area

Industry Sector	Regional Study Area (%)	Local Study Area (%)	Core Study Area (%)
Total Construction	95	4	1
Residential Construction	91	7	2
Non-residential Construction	88	10	2
Total Manufacturing	92	6	2
Agriculture & Forestry	75	19	6
Mining & Quarrying	90	6	4
Utilities	71	21	8
Professional, Scientific & Tech. Services	94	5	1
Admin. Support & Waste Management Service	94	5	1
Accommodation & Food Service	93	6	1
Other Services	92	6	2
Health Care & Social Assistance Services	95	4	1

Source: Keir Corp using data from Emsi Burning Glass, 2021

3.3.5.5 Existing Supply Chain Purchasing Patterns

1 Table 11 summarizes Out of Area Supply Chain Purchases by key industry sectors across all three study areas. This provides an indication of their economic self-sufficiency. For the most part, out of area supply chain purchases experienced within each industry sector tend to increase moving down from the RSA to the LSA and CSA. Nevertheless, the analysis below more closely examines the Construction, Agriculture and Utility sectors.

Table 11: Percent of Out of Area Supply Chain Purchases by Industry Sector and Study Area

Industry Sector	Regional Study Area (%)	Local Study Area (%)	Core Study Area (%)
Total Construction	23	71	84
Residential Construction	15	61	82
Non-residential Construction	11	30	42
Total Manufacturing	41	58	67
Agriculture & Forestry	27	41	55
Mining & Quarrying	31	44	69
Utility	67	98	71
Professional, Scientific & Tech. Services	27	49	61
Admin. Support & Waste Management Service	30	52	64
Accommodation & Food Service	21	49	49
Other Services	27	67	89
Health Care & Social Assistance Services	28	59	71

Source: Keir Corp using data from Emsi Burning Glass, 2021

2 In terms of Total, Residential and Non-Residential Construction, the Regional Study Area appears to be largely self-reliant with limited need to purchase goods and services from outside of the area. While companies in the CSA depend more on goods and services sourced outside its borders, the CSA's higher LQ indicates a particular strength and advantage in the Residential Construction sector relative to the other study areas.

3 The out of area leakage related to the Agriculture and Forestry sector experienced by the LSA and CSA is in the range of 40 to 50 percent. This is substantially lower than the leakage rates these areas experience for many of the other key industry sectors. This indicates that both the LSA and CSA can provide good and services to their companies thereby retaining a higher proportion of expenditures. This is not surprising since both the LSA and CSA have economies that are strongly focused on agriculture.

4 The Utility sector is something of an anomaly in terms of purchasing distribution. Out of Area Purchases by companies located in the RSA reach 67% indicating that their operations are very dependent on goods and services from outside of the area. At the LSA level, these purchases increase to 98% indicating an even higher degree of leakage and dependence on outside goods and services. Even though the LSA accounts for a high percentage of employment and companies in this sector, it appears that the companies heavily rely on goods and services sourced from outside the area to support their operations.

3.3.5.6 Contributions to Value-add

1 Table 12 compares the contribution that each study area makes to respective total sector value-adds across the three study areas. In general, the contribution to value-add drops off significantly moving from the RSA through to the LSA and CSA. However, the performance within the Agriculture and Forestry and Utility sectors are two exceptions.

2 In the Agriculture and Forestry sector, the LSA and CSA's combined contribution to value-add amounts to 17% of the total, which is not surprising given the strength in agriculture demonstrated by both areas. Other notable sectors include the Total and Residential Construction sectors. In the Utility sector, the LSA makes a significant contribution to value-add due to the influence of Bruce Power.

Table 12: Percent Contribution to Value-Add ($M) by Study Area

Industry Sector	Regional Study Area (%)	Local Study Area (%)	Core Study Area (%)
Total Construction	90	8	2
Residential Construction	89	8	3
Non-residential Construction	>97	2	<1
Total Manufacturing	>97	2	<1
Agriculture & Forestry	83	12	5
Mining & Quarrying	94	4	2
Utility	>20	79	<1
Professional, Scientific & Tech. Services	>97	2	<1
Admin. Support & Waste Management Service	>96	3	<1
Accommodation & Food Service	>95	4	<1
Other Services	94	5	1
Health Care & Social Assistance Services	96	3	1

Source: Keir Corp using data from Emsi Burning Glass, 2021

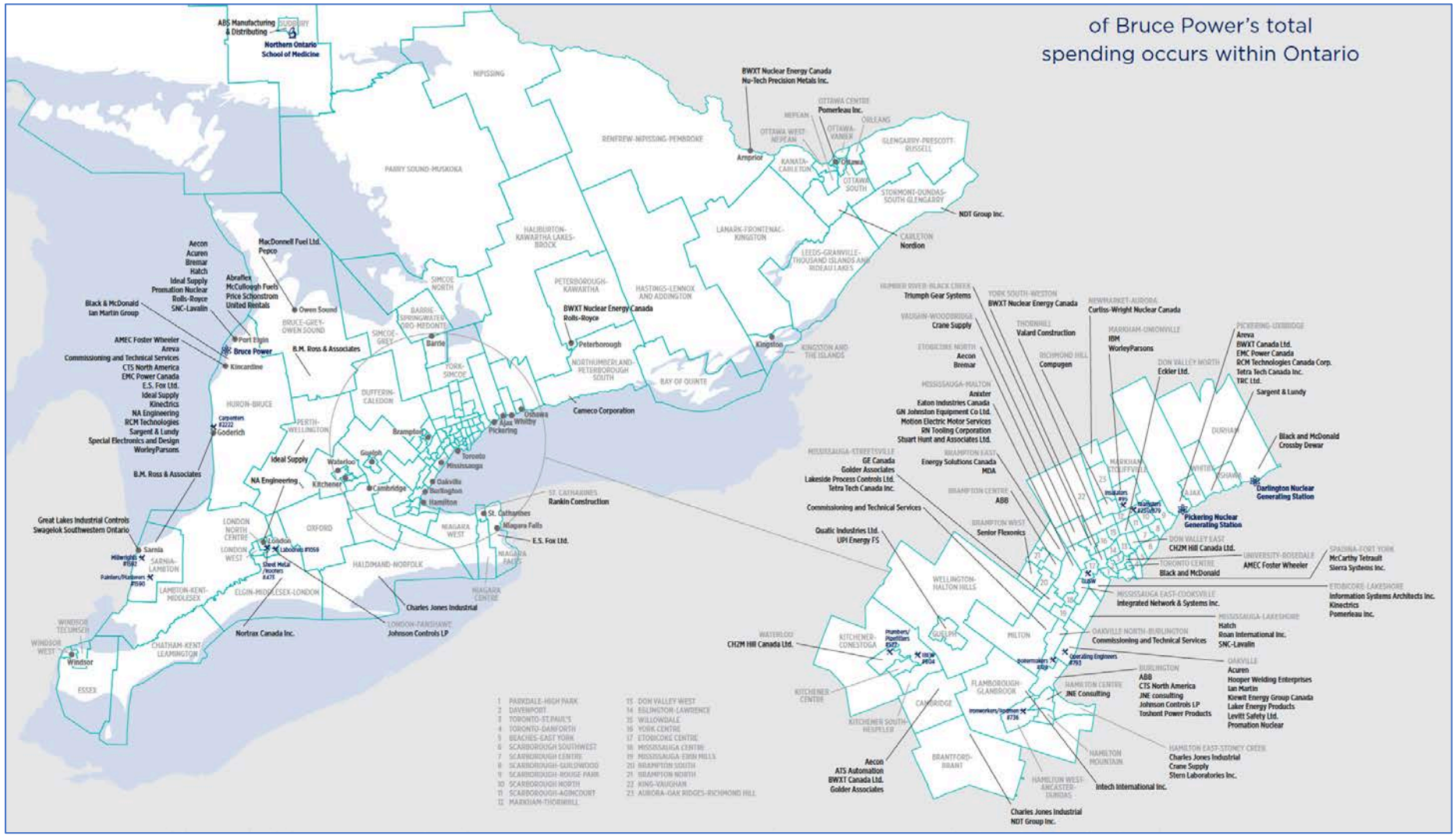
3.4 Nuclear Supply Chain Companies

3.4.1 Bruce Power Supply Chain

1 Bruce Power estimates that over 90% of its spending occurs in Ontario. Figure 10 below provides an overview of where the firms involved in its supply chain are located.

2 A total of 85 firms are depicted on the map and the numerical distributions of these names according to the map are tabulated in Figure 10. Not only do many of these companies have multiple offices in Ontario, but some are also located in Bruce County. The Figure 9 map in combination with Figures 11 and 12, particularly in the case of Bruce County, demonstrates that 28% of the firms have a presence within the County.

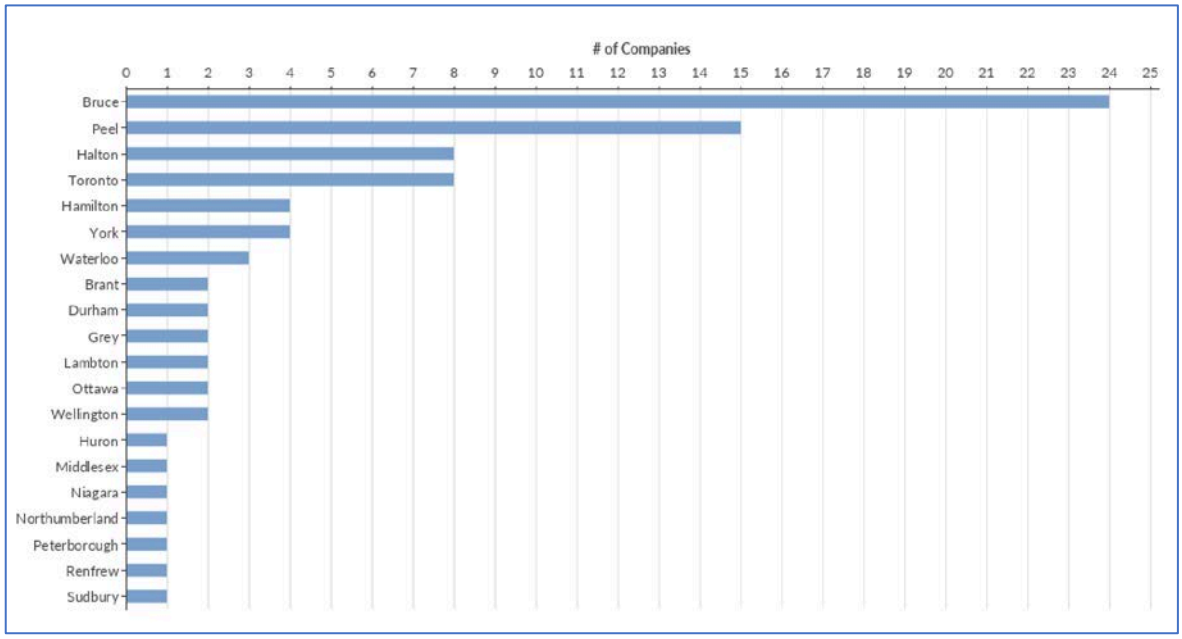
Figure 10: Location of Companies Involved in Bruce Power Supply Chain



Source: Bruce Power, Ontario Economic Impact Map, 2018

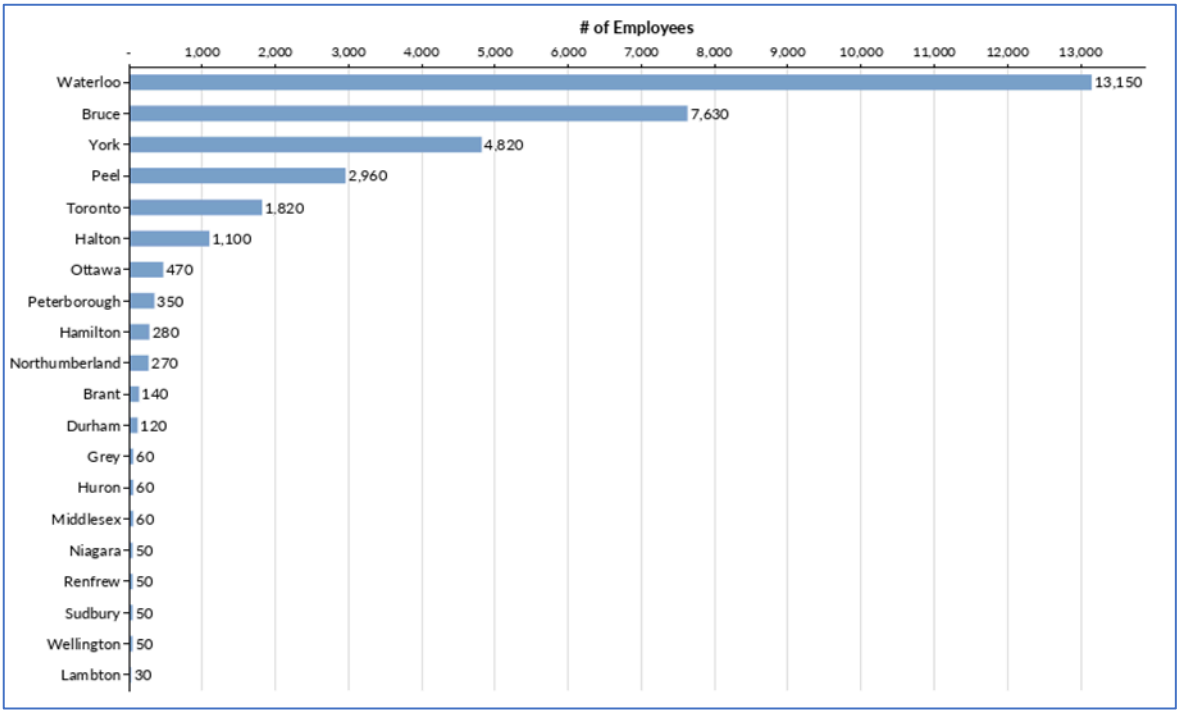
3 The 85 firms account for approximately 33,500 employees in Ontario. The employee count for the firms represented in Bruce County reaches approximately 7,600. In comparison, firms with a presence in Waterloo account for roughly 13,150 employees. Figure 11 depicts the employee counts by area according to the mapped distribution of companies.

Figure 11: Location Counts by Area for Companies with a Presence in the Bruce Power Supply Chain



Source: Keir Corp using data from Bruce Power, Ontario Economic Impact Map, 2018

Figure 12: Employee Totals by Area for Companies with a Presence in the Bruce Power Supply Chain



Source: Keir Corp using data from Bruce Power, Ontario Economic Impact Map, 2018

4 Figures 10 through 12 indicate a strong presence of firms in the LSA, primarily in Kincardine and Saugeen Shores, that are part of Bruce Power's supply chain. The fact that they are part of the supply chain implies that they have abilities to supply goods and services to the nuclear industry.

5 Furthermore, all of the firms combined have a significant employee count. Relative to the Project, those companies with offices in the Local Study Area and beyond have employee compliments that can potentially help meet the workforce needs of the Project across its construction and operations phases.

3.4.2 Organization of Canadian Nuclear Industries

1 The Organization of Canadian Nuclear Industries (OCNI) is headquartered in the City of Pickering but also has a branch office in Kincardine. The mandate of the organization is to promote a healthy nuclear industry in Canada.

2 The organization has four focal points.[3]

- ***Connection:*** OCNI creates and maintains strong connections among members and customers that lead to contracts for members.
- ***Capacity:*** OCNI organizes workshops to address technical and process issues that aide member companies in acquiring skills and quality programs that are demanded by utility customers, the national nuclear laboratory and EPC contractors.
- ***Global Reach:*** OCNI supports member companies in off-shore markets by providing market updates and leading trade missions (in-person and virtual) to strategic target markets with high growth potential.
- ***Advocacy:*** OCNI works directly with partners to create a positive climate for the nuclear supply chain sector in Canada.

3 Among its recent initiatives, OCNI accomplished the following:

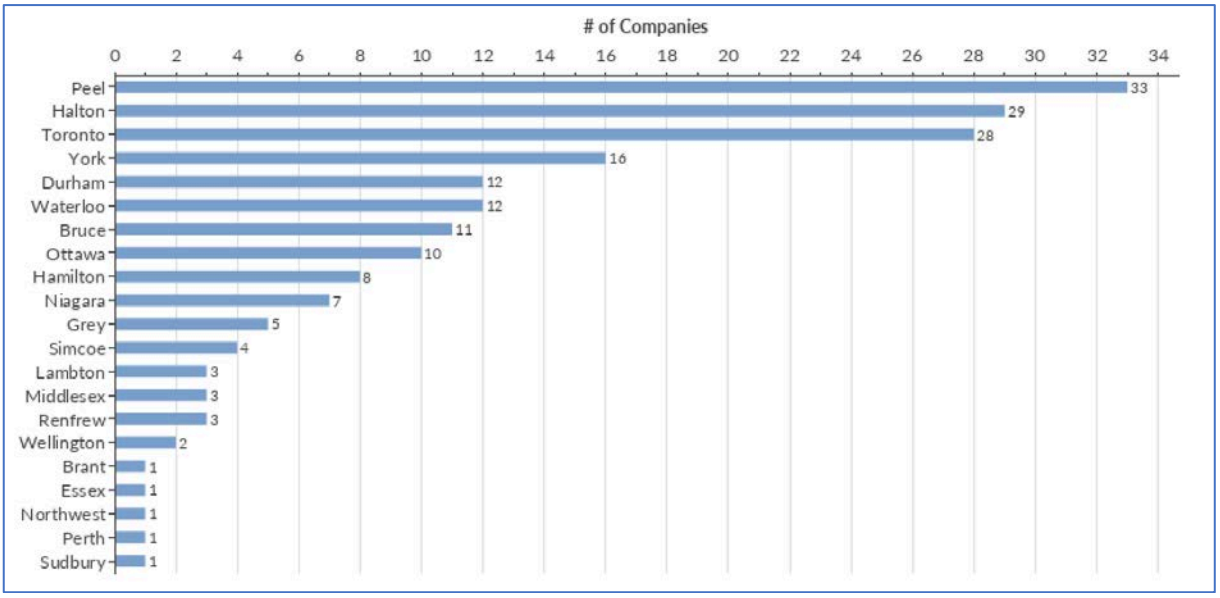
- Signed a Memorandum of Understanding (MOU) with the First Nations Power Authority (FNPA) to jointly promote and support Indigenous engagement and participation in the Canadian Nuclear Industry.
- Mandated ongoing advisement to the OCNI CEO on research, development and implementation of new technologies and processes that will help transform and create new opportunities for the Canadian nuclear supply chain.
- Leading the development of a Pan-Canadian Small Modular Reactor (SMR) supply chain to successfully deploy SMRs in Ontario, New Brunswick, Saskatchewan, and Alberta.
- Ongoing involvement with the OCNI Youth Shadow Council (OYSC) to nurture leadership and involvement of young people to help shape the future of the Canadian nuclear industry and help Canada achieve its “Net Zero by 2050” target.

4 OCNI has approximately 240 member companies and in combination these have roughly 15,000 employees. Once again, like the Bruce Power supply chain companies, firms involved with OCNI have the potential to in part, help the Project with its direct and indirect workforce requirements across its various phases.

5 Figure 13 highlights the distribution of 191 OCNI member companies in Ontario. Of these, 34 companies have addresses in the Regional Study Area and 11 have a presence in Bruce County.

[3] *Source: OCNI, Annual Report, 2021*

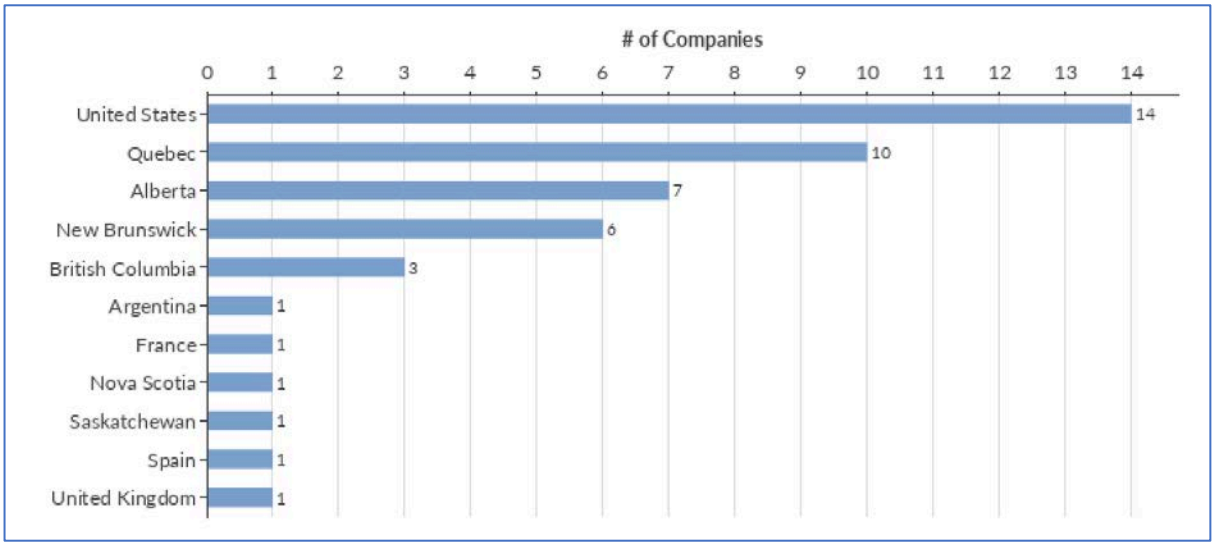
Figure 13: Distribution of OCNI Member Companies in Ontario



Source: Keir Corp using data from OCNI, 2022

6 Figure 14 shows the distribution of OCNI members in locations outside the Province. Twenty-eight companies are located in other provinces and 18 are located outside of Canada.

Figure 14: Distribution of OCNI Member Companies in Ontario



Source: Keir Corp using data from OCNI, 2022

3.5 Observations and Conclusions

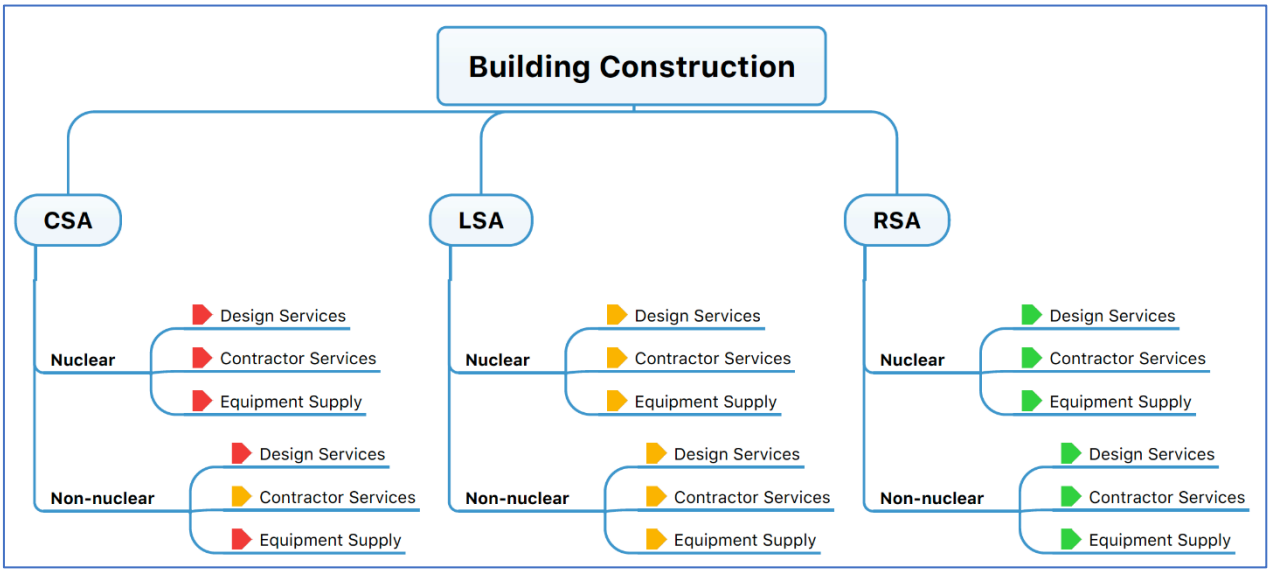
3.5.1 Supply Chain Observations

1 The previous sections have comparatively examined the capabilities of supply chain sectors and organizations across three study areas. The statistics highlight the order of magnitude differences between them.

2 The RSA economy has enormous scope and scale, and for many industry sectors it is a significant economic force at the provincial and national levels. The LSA and CSA in most cases are relatively minor players in comparison. Outputs in the RSA are commonly measured in the $billions, whereas in the LSA the level is $100s of millions and in the CSA study area $10s of millions. There are exceptions but in general, there are considerable differences in the economic weight, reach and self-sufficiency of the three study areas.

3 The following observations return to the Project Supply Chain structure put forward by NWMO in Figure 8 above. Figure 15 first looks at the building construction sector[4].

Figure 15: Building Construction Capability Rating



Source: Keir Corp, 2022

4 In reference to Figure 15, there is considerable strength in the RSA for both nuclear and non-nuclear capability across design and contractor services and equipment supply. Dropping down to the LSA, there is medium strength across all these sectors. On the nuclear front, aided in large part by Bruce Power's insistence that suppliers to the MCR Project have a local presence,

[4] *The coloured markers in the Figures in this section signify qualitative good, fair, poor capability ratings. Green = Good, Yellow = Fair and Red = Poor.*

many of the major engineering companies with design capabilities have offices in the LSA particularly in Kincardine and Saugeen Shores.

5 On the non-nuclear front, construction services and equipment supply companies have a presence in the LSA but with strong connections via supply chain linkages to parent companies and non-related firms within the RSA. The fact that Kincardine and Saugeen Shores are the two largest settlement areas in Bruce County and the two municipalities are slated for the most growth going forward make them focal points for companies with construction capability in the non-nuclear sector.

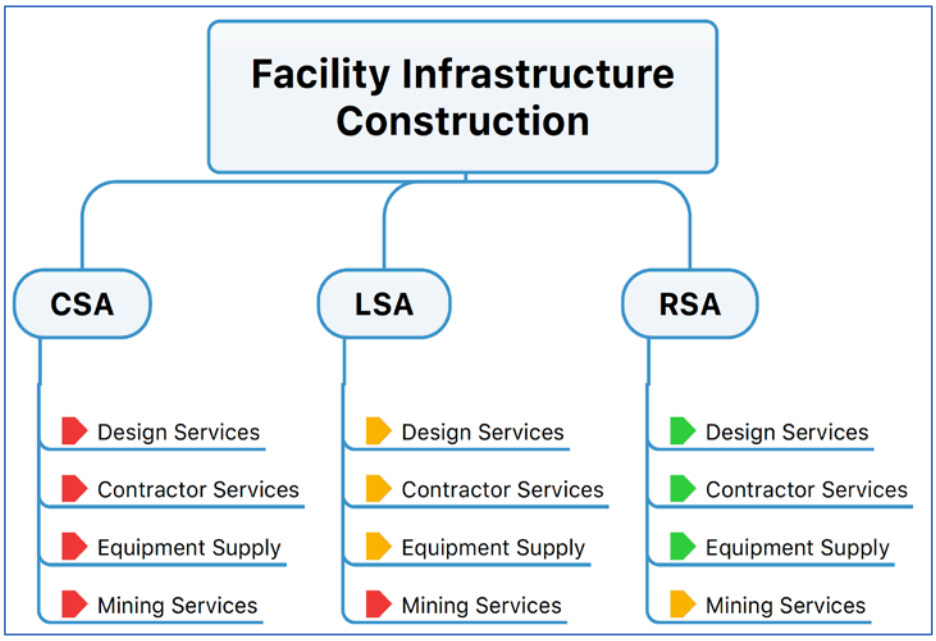
6 The CSA has little capacity on the nuclear construction front. Some companies largely in Walkerton are minor players in the supply chain and the recent establishment of the Kinectrics Laundry Facility in Teeswater also provides a nuclear connection. A few residents of the area are also part of the labour forces associated with the MCR Project and Bruce Power operations. Overall, however, the CSA shows no critical mass or capability on this front relative to the RSA and LSA.

7 Turning to non-nuclear construction capabilities, the CSA has very limited capability for the supply of design services and equipment supply. With respect to contactor services the key strength of the area is in the residential construction sector. There is very little capability in the non-residential construction sector. These circumstances suggest that the most immediate opportunities for the CSA on Project construction are associated with accommodation. Contractor upskilling should also be a priority to give the area capabilities and experience for the supply of non-residential contractor services.

8 Figure 16 sets out the study area capabilities for the construction of facility infrastructure (i.e., water, sewer, power, roads, etc.). These capabilities are strongly present in the RSA. The area has experienced strong growth and is slated for continued strong growth for the foreseeable future. Companies involved with major infrastructure construction for residential, commercial, and industrial projects are all present in the RSA.

9 The one partial weakness in RSA capabilities on the infrastructure construction front is with respect to mining services. Although there are many large quarries in the area and a major underground salt mine operation in Goderich, there are other areas in the province such as Sudbury and Timmins where mining capabilities are more extensive.

Figure 16: Facility Infrastructure Construction Capability Rating



Source: Keir Corp, 2022

10 In the LSA, infrastructure design and contractor construction services are present but not to the same degree and magnitude that they are in the RSA. Nevertheless, the presence of satellite offices in the area with strong connections to head offices and supply chains in the RSA and beyond provide the area with capabilities that can be readily mustered should needs arise.

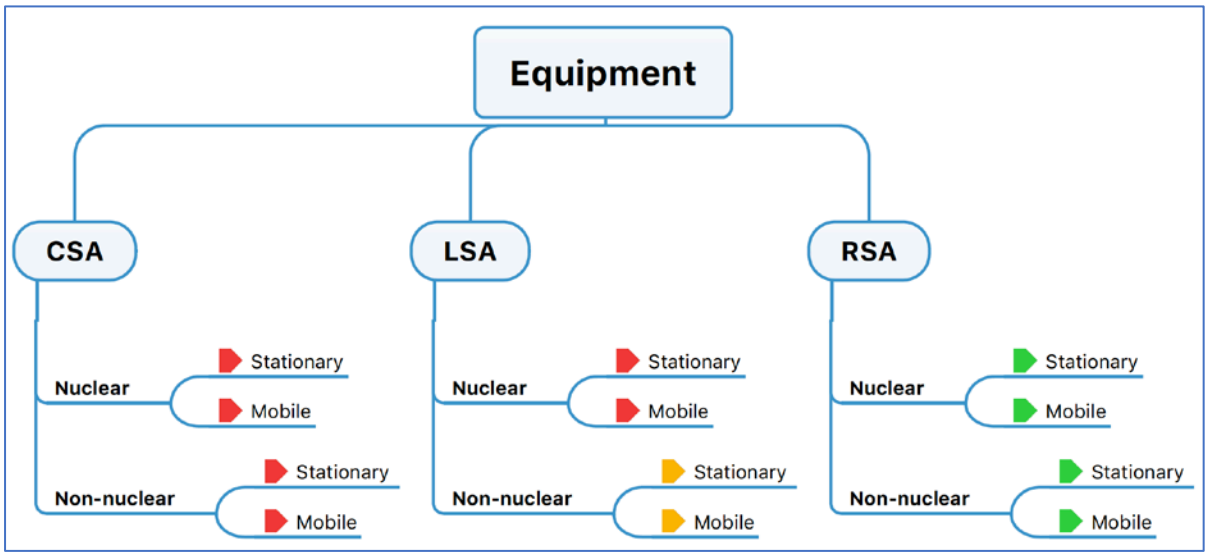
11 Within the LSA, the obvious sector deficiency in the construction portfolio is for mining services. There are no major capabilities in the area for the supply of these services.

12 Looking at the CSA relative to the RSA and LSA, there are no apparent strengths in the area for the provision of infrastructure construction services or equipment supply.

13 Figure 17 looks at the abilities of the respective study areas to supply operating equipment for both nuclear and non-nuclear activities. The advantage clearly resides with the RSA. Companies actively involved with the supply of stationary and mobile equipment for the nuclear industry are present in the area. The Bruce Power and OCNI company lists confirm their presence.

14 The RSA is also a powerhouse for the manufacture and supply of non-nuclear stationary and mobile equipment. The area is home to some of the largest automotive manufacturing operations in the country and it is a leader in advanced manufacturing for a wide variety of equipment.

Figure 17: Equipment Manufacture and Supply Capability Rating



Source: Keir Corp, 2022

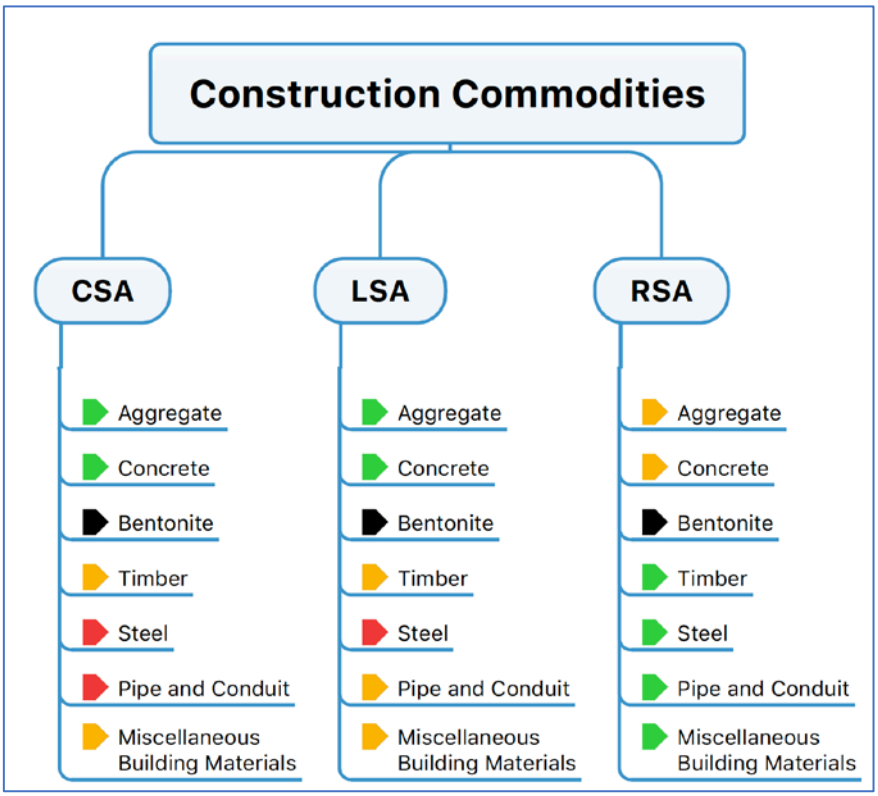
15 The LSA does not have strong manufacturing capabilities for nuclear equipment both stationary and mobile. Albeit there are companies located in the area that have connections to out of area home operations and other companies elsewhere that do have these capabilities.

16 With respect to the manufacture and provision of non-nuclear stationary and mobile equipment the LSA has some abilities, particularly through equipment dealers and rental agencies, but capabilities are modest relative to the broader deeper capabilities found within the RSA.

17 There is no evidence that the CSA is currently involved with the manufacture and supply of nuclear equipment either stationary or mobile to the nuclear industry. With respect to the manufacture and supply of non-nuclear stationary and mobile equipment the abilities are modest relative to the capabilities in the LSA and hugely overshadowed by abilities in the RSA.

Figure 18 compares the ability to produce construction commodities in the three study areas. Aggregate and concrete are readily available in the CSA and LSA, and both areas because of transportation costs have an advantage over the RSA in serving the needs of the Project. The CSA given the availability of these products in the immediate vicinity of the potential Project Site, enjoys a distinct locational advantage over the LSA. Bentonite will not be sourced from any of the three study areas. The preferred location is from Wyoming in the United States.

Figure 18: Construction Commodities Capability Rating



Source: Keir Corp, 2022

18 Timber is produced in each of the study areas. Raw logs are produced and milled in all three of the areas, but treatment is done primarily in the RSA. Treated stamped lumber for the project will likely be sourced from the RSA and further afield depending on the requirements of the project.

19 Steel fabrication is done in each of the study areas, but primary heavy steel fabrication is confined to the RSA. Both the LSA and CSA have some specialized fabrication abilities for car parts and other products. However, the RSA also has these capabilities at significantly larger scales across a much broader spectrum of outputs.

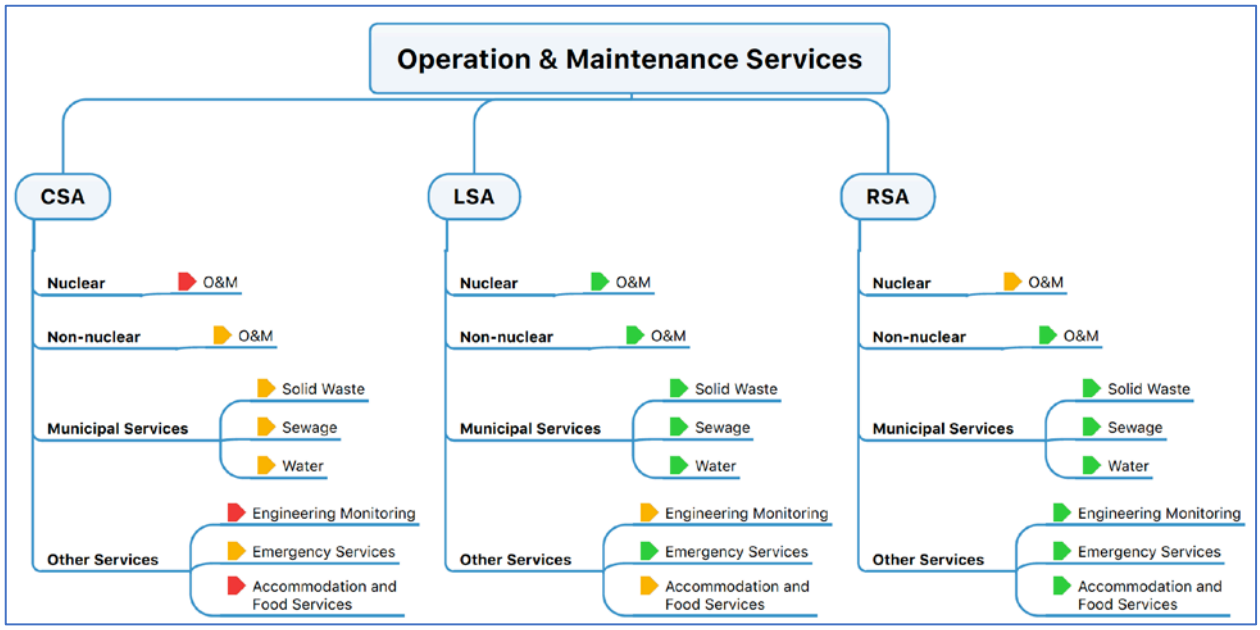
20 Pipe and conduit production capabilities generally mirror the above. The biggest capabilities and broadest product choices reside with the RSA. These capabilities are dramatically less in the LSA and very scarce in the CSA.

21 Production of miscellaneous building materials is prolific and at a large scale in the RSA. Miscellaneous building products are produced and available in the LSA and CSA, but volumes and diversity of production are much more limited. It is also evident that much of the supply chain input needed for building material production in the LSA and CSA is located beyond their borders.

22 Figure 19 looks at the capability of the study areas to supply operation and maintenance services. For nuclear services, the location of Bruce Power in

the LSA gives this area a strong competitive advantage over the RSA. In the case of the CSA there is very limited capacity except for the Kinectrics Laundry Facility in Teeswater.

Figure 19: Operation and Maintenance Services



Source: Keir Corp, 2022

23 Availability of non-nuclear operation and maintenance services are readily available in the RSA and LSA, but at a much more reduced scale in the latter. These services are also available in the CSA but again at a reduced scale and diversity compared to the LSA.

24 Municipal service capabilities are present across the study areas but at progressively lesser levels and diminished capability moving down from the RSA to the CSA.

25 Engineering monitoring services capabilities are large and diversified in the RSA, and relatively strong in the LSA given the presence of numerous engineering consulting firms. The CSA by contrast has relatively limited capability for this service.

26 The RSA and LSA have strong capabilities with respect to emergency services. In the RSA the size and nature of the area in terms of residential, commercial and community activities demands substantial emergency service capabilities. In the LSA the special needs of the communities are well served, especially in the Kincardine area where heightened emergency service and health care capabilities are required to meet the requirements of Bruce Power. In the CSA, emergency services and health care are available; however, they are not at the scale and speciality of services in the other two study areas.

27 Accommodation and food services are widespread and sizeable in the RSA. The quantity and diversity of these services in the LSA is much less than in

the RSA but still present and vibrant. In the CSA there are some excellent quality accommodation and food service establishments, but they are limited in number and location.

3.5.2 Conclusions

1 The CSA is nested within the larger, stronger, and more diversified economies of the LSA and RSA. Economic opportunities associated with the Project will in most cases naturally migrate to these surrounding areas especially given the fact that their relative proximity generally precludes distance being a limiting factor.

2 Representatives from the CSA municipalities have all expressed a desire to see economic benefit derived from the potential Project. For this to happen, the CSA will need to be proactive, focused and compete with the other areas for Project-associated economic development. The chapters that follow lay out a game plan and identify opportunities for the CSA municipalities to achieve their economic development aspirations. “Having it all” is neither a good, nor an achievable starting point. Starting without a plan and collaboration among CSA member municipalities is also recipe for failure.

3 In the chapters ahead, a focused course of action is laid out to enable the CSA municipalities to compete and be successful within the context of regional economic opportunities available through the Project.

4. The Strategy

1 This Study provides an approach to an economic development strategy. It is presented by the authors to foster discussion only. It does not represent commitments or actions for the NWMO, the Municipality of South Bruce, or other parties. The final decisions on actions and commitments will be made at a future date.

2 A strategy map for regional economic development is set out in Figure 20. It lays out a set of objectives and initiatives for guiding the Core Study Area Municipalities toward desired outcomes. Once outcomes are identified, the strategy map should be read from the bottom up. In the enabling tier, resources and capabilities need to be first put in place to create a team with an aligned vision and the abilities to identify and explore opportunities related to the Project.

3 In the opportunities and systems tier, the economic development team needs to make connections with a variety of interests pertinent to the opportunities under consideration. The opportunities themselves need to be thought of as a system of interconnected undertakings. The more they can be synergistic and leverage off one another, the more robust they will be, thereby making the whole economic development effort that much stronger. The same five 'strategy cascade' questions set out in Section 2.3 also apply for each specific opportunity under consideration.

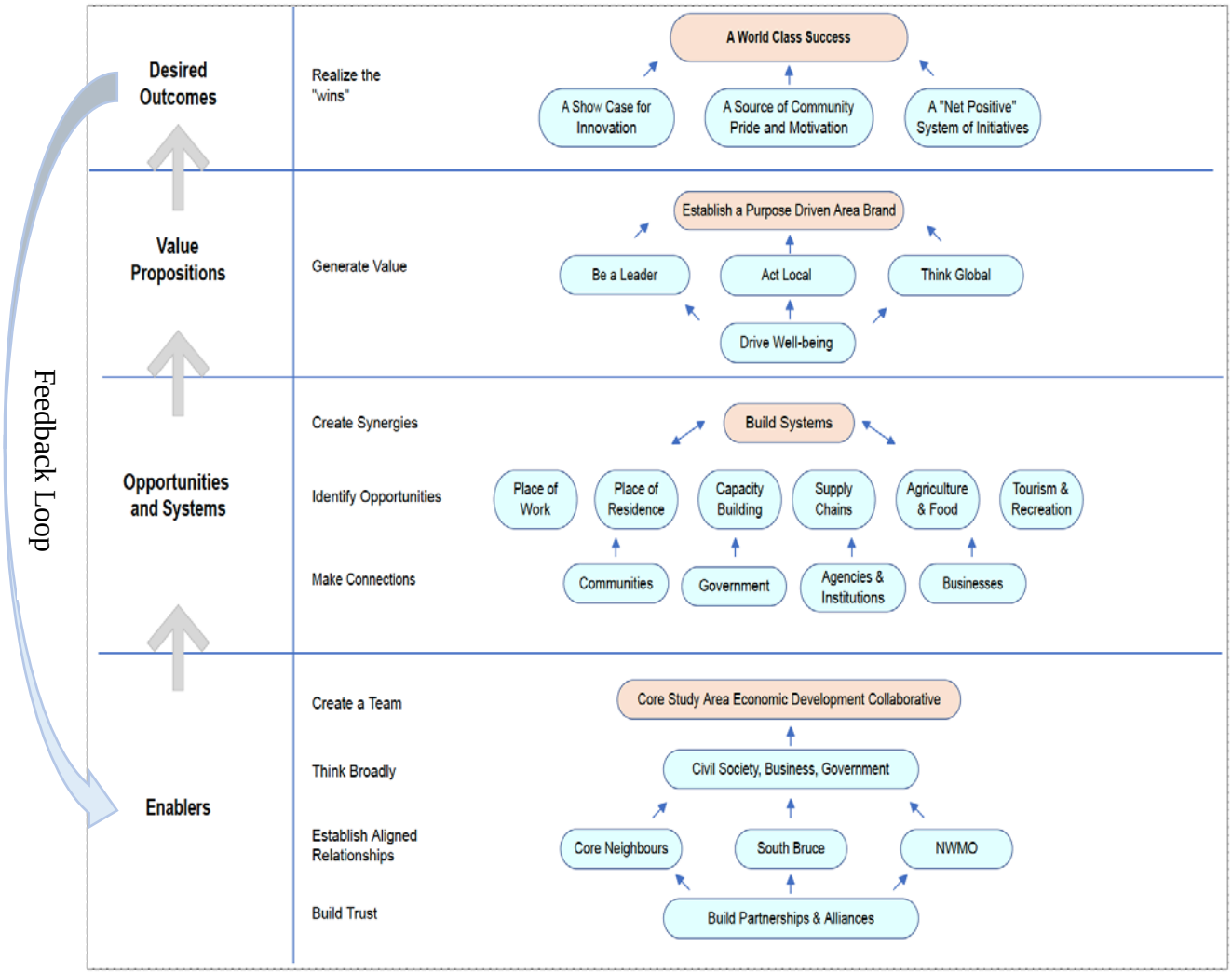
3 Economic development in part and in whole must deliver value. Each of the opportunities must have a value proposition which sets out the business case for the opportunity. Without the business case, the rationale for pursuit both in part and in whole is non-existent. At the apex of the value proposition tier is the forging of "brand". In many ways this becomes the identity of the organization, the initiatives pursued, and the geographies served.

4 The fourth tier includes the desired outcomes which are both the starting point and the end point of the plan. They are the destination that is underpinned by all the other tiers. When starting a journey knowing the desired end point is essential. The strategy provides a roadmap to achieving these outcomes by leveraging enablers, pursuing opportunities, and promoting the business cases to achieve the value proposition. The ability to successfully marshal and navigate the underlying tiers is what enables attainment of the desired outcomes.

5 These four tiers of the strategy map are elaborated upon in the following sections.

a. Desired Outcomes – *Section 5*
b. Enablers – *Section 6*
c. Opportunities and Systems – Section 7
d. Value Proposition – *Section 8*

Figure 20: Strategy Map for Regional Economic Development



Source: Keir Corp (2022)

5. Desired Outcomes

1. Desired outcomes reflect “winning aspirations”. These outcomes define what organizations seek to achieve through the workings of their economic development strategies. All of the upper and lower tier municipalities that constitute the Regional Study Area, Local Study Area and the Core Study Area have economic development aspirations. The Project coordinated and attuned with areas of interest offers potential to enable broad socio-economic benefit.

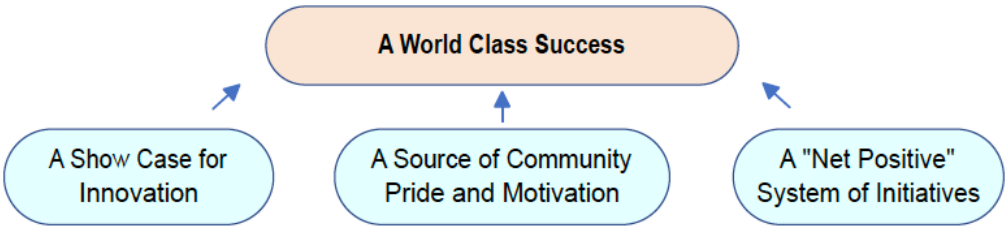
2. South Bruce has requested the development of a suite of community studies related to the Project, including this *Regional Economic Development Study*. The Municipality’s Guiding Principles relevant to the *Regional Economic Development Study* in the context of the Project are set out above in Section 1.3.1. Some are quite specific to particular economic sectors while others are more general in nature. Collectively they act as goals providing broad direction for economic development. The strategy, however, requires targeted objectives to act as galvanizing end point destinations.

3. Reflecting on earlier discussion, the Project is a moderate size long-term undertaking. Not only is it important at the local, provincial, and national levels but it is also important globally. From an economic development perspective, the Project needs to be considered as “a means to an end” and not as “an end to a means”. The Project presents a door to the future and a spectrum of potential initiatives across Project stages. The goals for the regional economic development strategy centered around the Project should not be pedestrian, they need to match the opportunity.

4. “Big goals” are ambitious and while not so easy to accomplish they can drive new thinking, stimulate change, and create well-being across many geographies. They are motivational and progressively stepping towards and attaining them can generate real pride.

5. With these attributes in mind, Project associated regional economic development needs to aim high. The following target outcomes in Figure 21 are suggestions.

Figure 21: Desired Outcomes



Source: Keir Corp (2022)

a) A Showcase for Innovation

The Project itself is unique, but the opportunities it presents are also rare. Regional economic development needs to highlight the innovations enabled by the Project. Some of these might include:

- Community integration and development
- Training and capacity building
- Technology applications
- Sustainability
- Ecosystem enhancement
- Land and resource use
- Business creation
- Problem solving

b) A Source of Community Pride and Motivation

South Bruce and area need to be proud of their economic development efforts and accomplishments. It is important that people feel they have contributed to initiatives that make a positive difference. Some initiatives will be localized, while others will cast a much larger shadow. The bottom line is that people need to realize a confident sense of achievement.

c) A Net Positive System of Initiatives

Regional economic development initiatives enabled by the Project should be an interconnected constellation reflecting whole systems thinking. Initiatives are connected to one another and play both supportive and catalytic roles. Across the spectrum of initiatives, the goal is “net positive” – meaning that the local area and communities and the places and environments touched by them should be better off because of them. The twelve principles of net positive are set out in Figure 22.

d) A World Class Success

At the very top of the strategy map is the goal to be a world class success. The bar is high but aiming for anything less is under shooting. The Project is a world class project. The regional economic development strategy needs to cast itself in the same light. The Project and the opportunities that it can generate should seek to make the world a better place. If all the other parts of the strategy are orchestrated to deliver real value, this outcome will be conveyed. The world is watching!

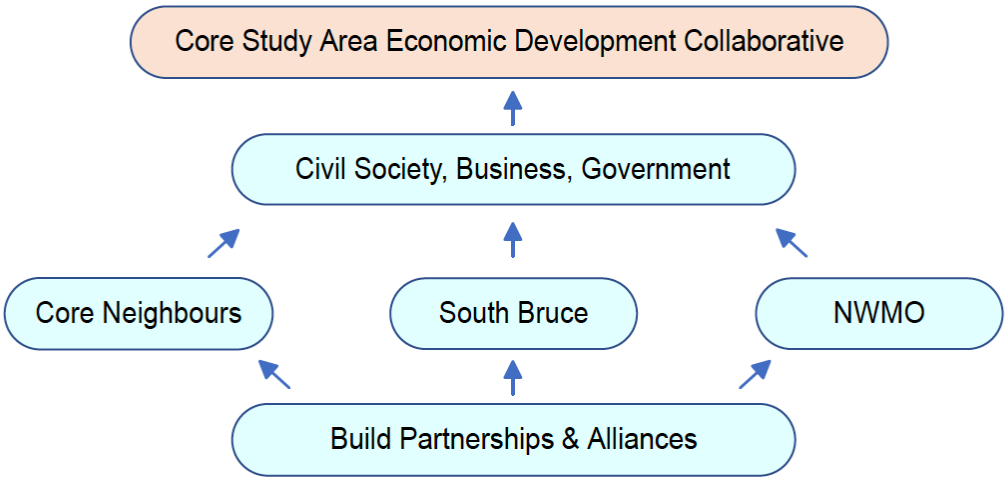
Figure 22: The Principles of Net Positive

1. The organisation aims to make a positive impact in its key material areas.
2. The positive impact is clearly demonstrable if not measurable.
3. As well as aiming to have a positive impact in its key material areas, the organisation also shows best practice in corporate responsibility and sustainability across the spectrum of social, environmental and economic impact areas, in line with globally accepted standards.
4. The organisation invests in innovation in products and services, enters new markets, works across the value chain, and in some cases, challenges the very business model it relies on.
5. A Net Positive impact often requires a big shift in approach and outcomes, and cannot be achieved by business-as-usual.
6. Reporting on progress is transparent, consistent, authentic and independently verified where possible. Boundaries and scope are clearly defined and take account of both positive and negative impacts. Any trade-offs are explained.
7. Net Positive is delivered in a robust way and no aspect of a Net Positive approach compensates for unacceptable or irreplaceable natural losses, or ill treatment of individuals and communities.
8. Organisations enter into wider partnerships and networks to create bigger positive impacts.
9. Every opportunity is used to deliver positive impacts across value chains, sectors, systems, and throughput to the natural world and society.
10. Organisations publicly engage in influencing policy for positive change.
11. Where key material areas are ecological, robust environmentally restorative and socially inclusive methods are applied.
12. An inclusive approach is adopted at every opportunity, ensuring affected communities are involved in the process of creating positive social and/or environmental impacts.

Source: Forum for the Future, (2013)

6. Enablers

Figure 23: Enablers



Source: Keir Corp (2022)

1. At the bottom of the strategy map (Figure 23), the focus is on enablers. These are the key stakeholders that initially need to be aligned and brought together through partnerships and alliances to effectively pursue regional economic development around the Project.

2. NWMO and South Bruce are clearly essential participants for moving forward. They have negotiated an MOU (June 2022) with respect to the Project. This understanding provides NWMO and MSB with some flexibility with respect to the composition of the Collaborative. From NWMO's perspective they could either be a member of the Collaborative or a Partner called on to help to implement specific opportunities. From the communities' perspective having an arm's length relationship with NWMO may facilitate negotiations on those specific opportunities.

3. However, since late 2021 discussions have also taken place between South Bruce and its immediate neighbours (i.e., Huron-Kinloss, Brockton, North Huron and as of early 2022 Morris-Turnberry) on how they all might collectively pursue Project-associated economic development.

4. The Saugeen Ojibway Nation (SON) is another key partner that may share similar goals and aspirations around the Project.

5. The prospect of stakeholders collaboratively working together and combining resources, assets and capabilities dramatically opens up the potential to create value around civil society, business, and government opportunities. A good example of an effective collaboration is the Southwestern Ontario Marketing Alliance or SOMA, which has been operating since the early 1990s (www.canadasindustrialheartland.com).

6. Key ingredients for realizing a "Core Study Area Economic Development Collaborative" team ('the Collaborative') include: trust, alignment, broad thinking, and teaming.

1. <u>Build trust</u>:

a) Leverage the existing relationship amongst the Core Study Area communities, SON and NWMO to create a team that shares a set of common goals and objectives aimed at identifying, encouraging, and supporting economic and workforce development.

b) Engage representatives from NWMO, Core Study Area communities and SON on the merits of working together to achieve their shared goals and objectives. Develop a value proposition that identifies how each partner benefits from being associated with the Collaborative.

c) Introduce the concept of a not-for-profit agency that would enable the partners to identify, encourage and facilitate economic development opportunities related to the Project not only for the Core Study Area but also for Local Study Area and the Region. These opportunities would not only be directly related to the Project, but they could also represent innovative indirect spin-offs.

d) Build and maintain trust on purpose. Negotiate good contracts, deepen personal contacts and act reliably with reciprocity.

2. <u>Create alignment</u>:

a) Confirm each member's understanding of the overarching goals of the strategy (i.e., Desired Outcomes). Make sure partners understand what the economic development strategy is trying to accomplish in whole and in part.

b) Identify what internal and external resources are needed for success. Look at the outcomes and opportunities being pursued and gauge the resources and connections that need to be put in place to arrive at success.

c) Understand how a collaborative relationship is an enabling force that drives opportunity and creates value. Identify the abilities that the relationship brings to the table. Understand its advantages and disadvantages and gaps that are going to need filling.

d) Identify the geographic landscape of the strategy. Some initiatives will be quite localized, others will play over broader geographies both domestic and abroad.

e) Ensure members understand the advantage and leverage that an aligned collaborative brings to the regional economic development table.

f) Minimize competing interests and internal rivalries.

g) At the outset look for early success with easy opportunities. This will build confidence and create momentum.

3. Think broadly:

a) Take account of self-interests but also look beyond to the interests of others.

b) Look at how opportunities and initiatives can be connected socially, economically, physically, and spatially.

c) Be creative, embrace innovation and look to the future, both near term and long term.

d) Look for synergies with others. Identify the critical links.

e) Learn from the experience of others. See what others are doing.

4. Be a team:

a) Establish a not-for-profit agency (the Collaborative) to identify, develop and promote initiatives that will lead to economic and workforce development in the CSA and more broadly for the Region. Focus on opportunities that are not only directly related to the Project, but also spin-off opportunities that might be more innovative.

b) The Collaborative could be formed in two ways. One option would include representatives from NWMO, the Municipalities of South Bruce, Brockton, Huron-Kinloss, North Huron, Morris-Turnberry, and SON. The other option would see NWMO as a Partner to the Collaborative through its MOU with MSB, and the Collaborative would then include the CSA Municipalities plus SON.

c) The Collaborative should be based on a Memorandum of Understanding (MOU) that will be negotiated and developed by the Partners establishing their common ground, shared interests, and objectives.

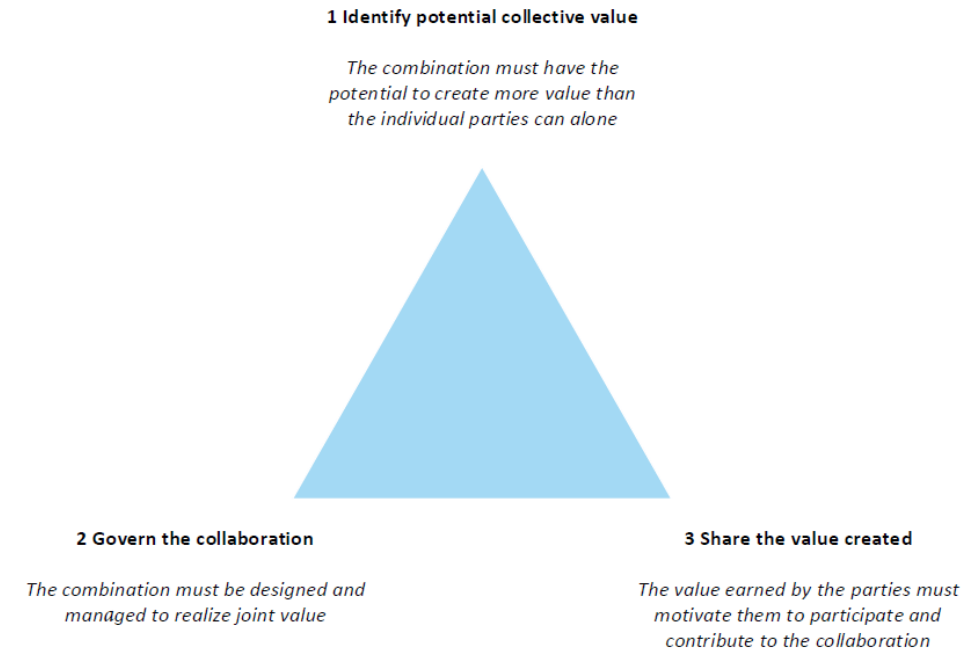
d) The MOU will act as an enabling document to define, encourage, and support initiatives that will engage business and government and lead to programs in economic and/or workforce development for the betterment of civil society in the CSA and Region.

e) The MOU will identify how the Collaborative will be administered. Some of the more obvious options include:
   - Rotating administrative duties among the Partners.
   - Compensating a Partner to take it on full-time; or
   - Hiring an outside administrator.

f) The MOU will include a mutually agreed upon funding formula to finance the administration of the Collaborative and its mandate. As a not-for-profit, it will be able to leverage government funding programs such as CanExport Community Investments (CECI) to fund economic development initiatives aimed at opportunity identification, promotion, and investment attraction.

g) Figure 24 provides a visual summation of the key overarching priorities for establishing a collaborative team.

Figure 24: Three Key Laws of Organizational Combinations

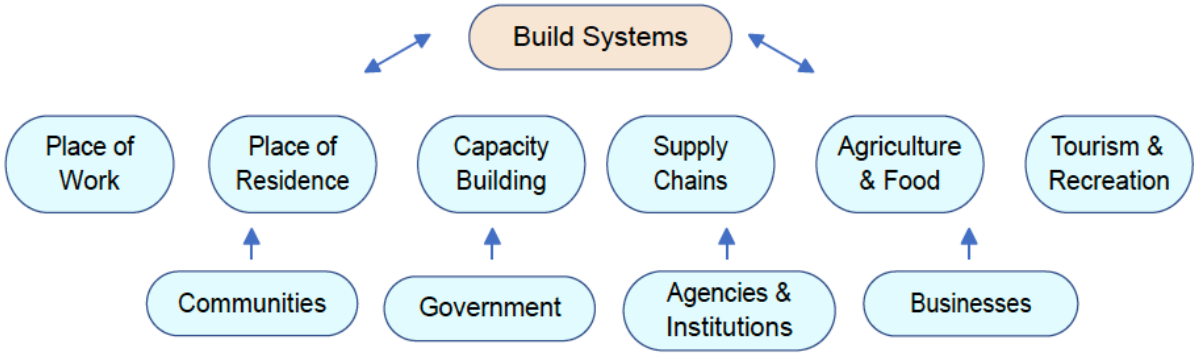


Source: Keir Corp (2022)

7. Connections and Opportunities

7.1 Connections

Figure 25: Connections and Opportunities



Source: Keir Corp (2022)

1. In this tier of the strategy map (Figure 25), once the Core Study Area Economic Development Collaborative has been formed, attention turns to making connections and the pursuit of economic development opportunities.

2. Not all connections are applicable to every opportunity. Focus is required to identify the opportunities and make decisions on the outside interests who can help move them forward.

3. In a generic sense at this stage there are four groups of interests:

   a) Communities – the residents of an area that may be affected by a particular opportunity.
   b) Government – the different levels of government (i.e., local, regional provincial, national or even international) who might have interest in the opportunity and may be able to assist with moving it forward.
   c) Agencies and Institutions - that have skills, capabilities, and interests in line with the opportunities being explored.
   d) Businesses - who have the skills, resources, and capabilities to undertake prescribed tasks and get involved in the pursuit of the opportunities.

4. Make connections:

a) The Collaborative will seek to build relationships with a variety of organizations, agencies, and government departments/ministries to deliver its mandate to implement economic and workforce development initiatives. The intent will be to determine those organizations that share similar objectives to facilitate developing mutually beneficial relationships.

b) The Partners will identify the economic development related "Hot Button" issues facing local, provincial, and federal governments to identify areas of mutual interest where the Collaborative can benefit from alliances.

c) The Partners will engage with economic development departments within the Regional Study Area at community and county levels to understand their objectives, identify synergies and explore the potential for developing cooperation around key opportunities.

d) The Collaborative will engage with provincial government ministries such as Ministry of Economic Development, Job Creation and Trade, Invest Ontario and the Ministry of Agriculture, Food and Rural Affairs to identify potential synergies, areas of mutual interest and explore the potential for working collaboratively on opportunities.

e) The Collaborative will engage with federal government departments such as Global Affairs Canada's Trade Commissioners Service, Canadian Posts in selected key target markets, Invest Canada CanExport (ICCE), and NRCAN to identify and pursue potential investment opportunities and leverage funding programs aimed at strategic economic development and investment attraction.

f) The Collaborative will meet with local conservation authorities, such as the Saugeen Valley, Maitland Valley and Grey Sauble Conservation Authorities and organizations such as the Pine River Watershed Initiative Network to identify reclamation and wilding opportunities, trail development, identification, and protection of unique habitats.

g) The Collaborative will meet with municipal tourism staff and tourism associations such as the Bruce Peninsula and Saugeen Country Tourism Associations and the Bruce Grey Simcoe Regional Tourism Organization (RTO7) to discuss opportunities to develop tourism and recreational assets along with initiatives to encourage workforce development.

h) The Collaborative will identify and engage with current suppliers to the nuclear industry to better understand the potential impact that the Project might have on their business plans. The objective will be to identify supply chain opportunities that can be filled locally as well as gaps that can be filled through investment attraction. It can be especially attractive if these businesses could also potentially supply to Bruce Power.

i) The Organization of Canadian Nuclear Industries (OCNI) will be a key source of information to help identify suppliers both local and regional who have capabilities to serve the Project. The organization has an office in Kincardine.

j) Additionally, Bruce Power and Ontario Power Generation both have projects in the area and their respective procurement departments could be a valuable source of information on the capabilities of local companies to meet Project needs.

k) Working with County Economic Development Departments and local Business Associations, the Collaborative can further identify and meet with potential Project suppliers in the mining, construction, building supply and office equipment industries located within the Core and Regional Study Areas.

l) To further its workforce development mandate, the Collaborative will build relationships with organizations such as:
   - The Bluewater and the Bruce-Grey Catholic District School Boards to discuss how the Ontario Youth Apprenticeship Program (OYAP) can be leveraged to encourage and train young people in the Core Study Area to consider employment in the trades. NWMO can act as a partner or community resource encouraging students to consider a career in the trades and companies to participate by providing employment opportunities for students enrolled in OYAP.

   - Training organizations such as Fanshawe and Conestoga colleges and NORCAT[5] to identify NWMO's short, medium, and long-term skill requirements for the Project and Centre of Expertise. Identify those skills that can be met locally with appropriate training programs and those that are currently being met by the colleges as part of their regular curriculum.

[5] NORCAT (Northern Centre for Advanced Technology) can be leveraged to deliver the training required for those skills related to the Project's underground operations. NORCAT is a not-for-profit training, technology and innovation centre headquartered in Greater Sudbury. Additional detail is provided in the *Workforce Development Study* (Keir Corp. 2022b).

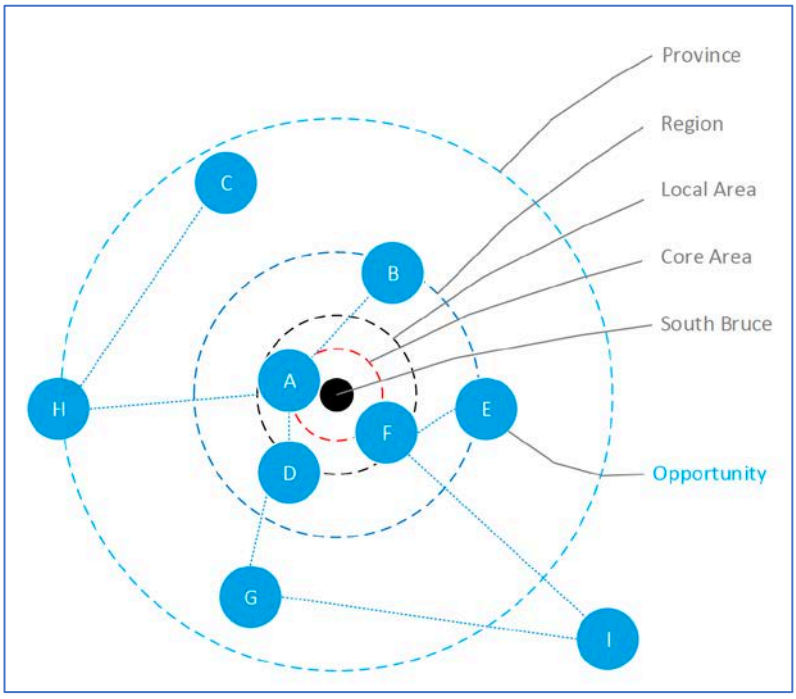
- Colleges and universities in the area. allowing NWMO to raise awareness regarding the career opportunities that will become available at NWMO and the Project. The intention should be to highlight not only careers in the trades, but also in administration, science, engineering, and technology. Get young people excited about a career in the nuclear industry, what NWMO is planning to accomplish and the organization's value proposition.

- Above and below ground construction companies and equipment suppliers that could be selected to deliver and install the various components of the Project. Encourage them to use the construction period as an opportunity to train local residents who might become part of the operations team once the Project is operational.

5. Making connections and identifying opportunities go hand in hand, and there is not necessarily an order of one before the other. However, in most cases the tendency will be to identify an opportunity and then assess who might be most suited to help move the opportunity forward and carry out implementation.

6. The Project presents an interconnected constellation of opportunities potentially spread across a variety of geographies and locational interests. Figure 26 sets out the concept.

Figure 26: A Constellation of Interconnected Opportunities

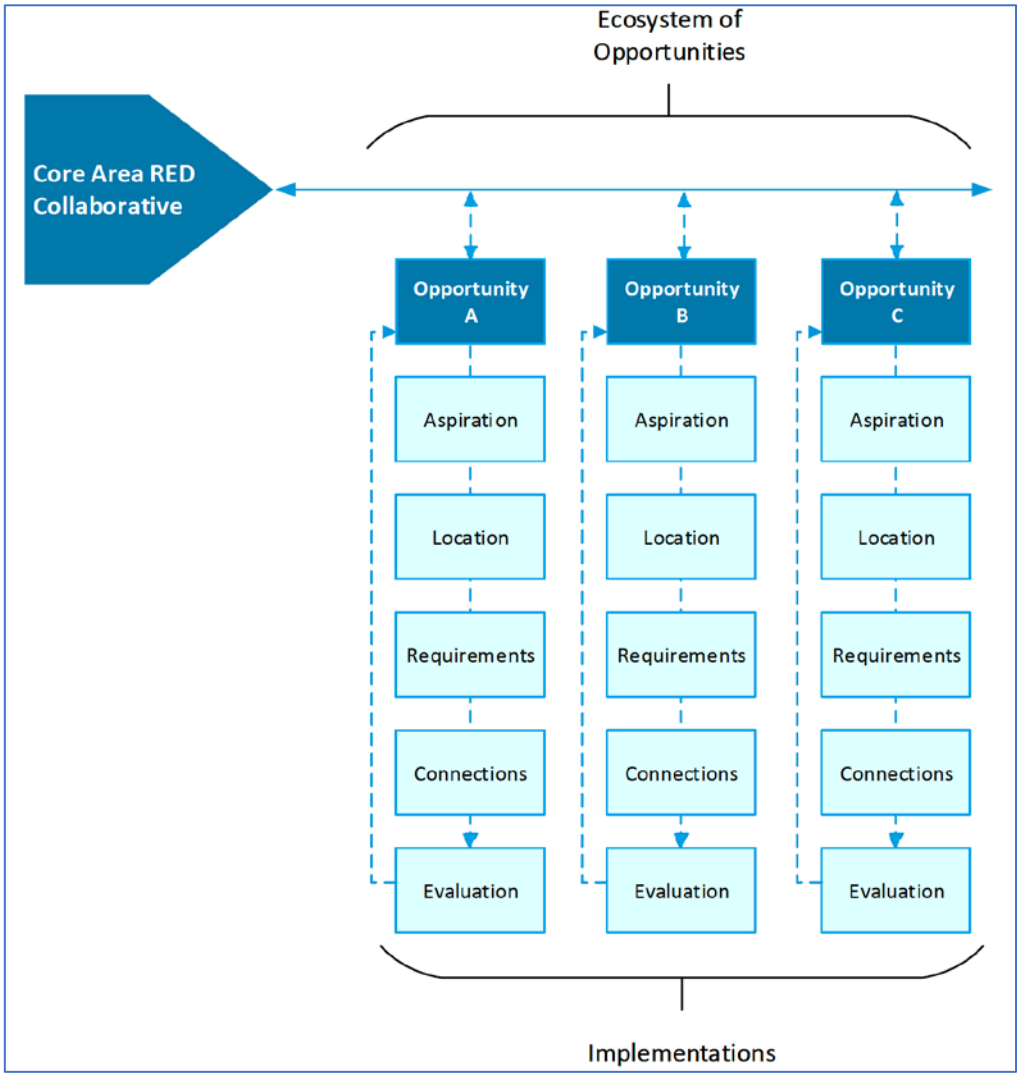


Source: Keir Corp (2022)

7. Figure 27 provides a framework for evaluating potential economic development opportunities at a high level.

8. Following on from the framework diagram, a series of opportunities are profiled and subject to high level SWOTs (Strengths Weaknesses Opportunities and Threats) analyses. This framework is modular and other opportunities can be readily plugged in and existing ones removed. The intention at this stage is to present a cross section of ideas as examples. Subsequently these opportunities or others can be better defined and scrutinized at much higher levels of resolution.

Figure 27: A Framework for Opportunity Considerations



Source: Keir Corp (2022)

9. In the following SWOTs analyses, a suite of opportunities organized in the following 4 themes are examined:
   - Training and Recruiting (Figures 28-32)
   - Supply Chain Considerations (Figures 33-37)
   - Resource Use and Enhancement (38-43)
   - Community Initiatives (44-47)

7.2 Training and Recruiting

Figure 28: Ontario Youth Apprenticeship

Opportunity	Ontario Youth Apprenticeship Program	
Aspiration	To develop a talent pool from within the Local and Core Study Areas.	
Location	Local Study Area	
Requirements	• Embark upon a program that informs Local Area Study residents about the career opportunities within the organization. • Target the program to encourage high school students to consider a career in the skilled trades.	
Connections	• Reach out to the Bluewater and the Bruce-Grey Catholic District School Boards to become a resource, and once the Project is operational a Community Partner.	
Evaluation	**Strengths**	**Weaknesses**
	• Lays a foundation for developing a local skilled workforce for the mid to long term. • Provides an employment option that allows young people to remain in the community.	• Requires the Collaborative to become proactive in terms of career development and training.
	Opportunities	**Threats**
	• Proactively adds to the pool of skill trades. • Tries to deal with the aging skill trades workforce.	• Other organizations already have the advantage of establishing themselves as preferred employers. • Businesses and organizations are already participating in the program.

Figure 29: NWMO Staffing

<table>
<tr><td>Opportunity</td><td colspan="2">NWMO Staffing</td></tr>
<tr><td>Aspiration</td><td colspan="2">To develop a local talent pool of highly skilled knowledge workers to meet the mid to long term staffing needs of NWMO.</td></tr>
<tr><td>Location</td><td colspan="2">Local Study Area</td></tr>
<tr><td>Requirements</td><td colspan="2">• It is anticipated that over time due to career changes and retirements, the staff at NWMO will need to be replaced.
• Raise awareness of NWMO's value proposition within the scientific and global community.
• Target college and university students in scientific, technical, and administrative fields and make them aware of the career opportunities at NWMO.
• Inform local area residents that have already graduated and are working elsewhere of the employment opportunities in an effort to repatriate them.
• Inform local area residents about scientific, technical, and administrative career opportunities at NWMO so they might pass on this information on to relatives and friends.</td></tr>
<tr><td>Connections</td><td colspan="2">• Career development offices within the colleges and universities servicing the Region</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Develops a pool of skilled knowledge workers from within the community.
• Provides high quality employment opportunities to local residents.</td><td>• Requires the Collaborative to be proactive in terms of workforce development.
• Requires the development of a competitive business case to create interest and attract employees.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Provides employment opportunities that can repatriate local residents.
• Creates an economy with employment opportunities that can attract and retain young people.</td><td>• Other organizations like Bruce Power are competing for individuals with similar skills.
• Competition for skilled knowledge workers will only intensify within the Region and beyond.</td></tr>
</table>

Figure 30: Workforce Development Underground Operations

<table>
<tr><td>Opportunity</td><td colspan="2">Workforce Development - Underground Operations</td></tr>
<tr><td>Aspiration</td><td colspan="2">To create training programs aimed at developing a local pool of underground mining talent</td></tr>
<tr><td>Location</td><td colspan="2">Regional Study Area</td></tr>
<tr><td>Requirements</td><td colspan="2">• Organize a job fair inviting people to apply for an underground operations training program related to the Project's Off-Site operations
• Preference is given to local residents and Indigenous people.
• Mine development company trains apprentices and employs them once qualified during the construction phase.
• Qualified underground miners would then have the option of joining the Project once it is operational.</td></tr>
<tr><td>Connections</td><td colspan="2">• Labour market planning boards operating in the region to advertise and organize job fairs.
• NORCAT to deliver the underground training program.
• Underground mine development company working on the Project to sponsor the apprentices.</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Provides training and employment opportunities for local residents.
• Helps to retain local residents including young people in the area.</td><td>• Requires the buy-in of both NWMO and the underground mine development company.
• Need to establish a 3-way partnership between NWMO – NORCAT – Mine Development Company</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• An established training initiative that can respond to the Project's medium to long term workforce requirements.
• Can provide training for similar projects located elsewhere internationally.</td><td>• Qualified workers from elsewhere can fill these positions.
• Lack of interest on the part of the underground development company to participate in the program.</td></tr>
</table>

Figure 31: Food Services Training and Workforce Development

<table>
<tr><td>Opportunity</td><td colspan="2">Food Services Training and Workforce Development</td></tr>
<tr><td>Aspiration</td><td colspan="2">To provide food services for the Project's On-Site and Off-Site operations, including the Centre of Expertise.</td></tr>
<tr><td>Location</td><td colspan="2">Project On-Site and Off-Site Operations</td></tr>
<tr><td>Requirements</td><td colspan="2">• NWMO enters into a partnership with Fanshawe or Conestoga colleges to set-up and manage a food service facility as part of their culinary program.
• Preference will be given to students from the communities that make up the Collaborative.</td></tr>
<tr><td>Connections</td><td colspan="2">• Engage with each of the colleges to determine their interest in getting involved with such an opportunity.
• Explore their interest in establishing a satellite culinary program at the Centre of Expertise.
• Engage the local agricultural and food processing community as suppliers.
• Include food products and recipes from the local Mennonite and Saugeen Ojibway communities.</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Localizes training programs directly related to tourism and hospitality
• Provides access to post-secondary education and training in the Region.</td><td>• Requires an additional effort on the part of the Collaborative and NWMO to organize.
• Requires a buy-in from several organizations and interest groups.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Culinary program can become a potential tourist destination offering culinary workshops.
• Workshops and training can leverage Mennonite or Indigenous recipes.
• Can create a post-workshop demand for local food products.</td><td>• Lack of interest on the part of the colleges due to a lack of awareness regarding the Project, the economic and market transformations occurring in the Region.</td></tr>
</table>

Figure 32: Training and Conference Facility

<table>
<tr><td>Opportunity</td><td colspan="2">Training and Conference Facility</td></tr>
<tr><td>Aspiration</td><td colspan="2">To create a training and conference facility that can support Project-related up-skilling and re-training as well as act as a springboard for leading edge international dialogue and consultation in nuclear waste management.</td></tr>
<tr><td>Location</td><td colspan="2">Project Off-Site, including Centre of Expertise</td></tr>
<tr><td>Requirements</td><td colspan="2">• Create world class centre for hosting research, dialogue and consultation regarding the management of nuclear waste.
• Organize global conferences on nuclear waste management with a particular focus on spin-off opportunities and new technologies.
• Explore the application of new technologies in other sectors such as agriculture
• Identify the application of new technologies and provide related training and up-skilling.</td></tr>
<tr><td>Connections</td><td colspan="2">• Colleges, universities, and research institutes servicing the Region
• Colleges, universities, and research institutes with a particular focus on nuclear energy, clean energy, and sustainable technology.
• Government departments and ministries with an energy, environment, economic or workforce development mandate.</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Creates a world-class research and innovation institute within the local community.
• Attracts global attention, senior scientists, researchers, and educators.</td><td>• Requires the community and the Collaborative to be proactive with a competitive business case.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Creates a market for international tourism.
• Attracts research and development projects related to the application of new technology in agriculture.</td><td>• There is considerable competition for this type of activity within the Region as well as internationally.</td></tr>
</table>

7.3 Supply Chain Considerations

Figure 33: Office Building and Grounds Maintenance

<table>
<tr><th>Opportunity</th><th colspan="2">Office Building and Grounds Maintenance</th></tr>
<tr><td>Aspiration</td><td colspan="2">To use local companies for providing office maintenance and grounds care.</td></tr>
<tr><td>Location</td><td colspan="2">South Bruce and Local Study Area</td></tr>
<tr><td>Requirements</td><td colspan="2">• Determine the (non-nuclear) building and ground maintenance requirements both for on and off-site facilities.</td></tr>
<tr><td>Connections</td><td colspan="2">• Bruce Power – to understand how they have satisfied these requirements with respect to their office buildings and grounds.
• Local and Regional Area business involved with the provision of these types of services.</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Provides significant long term business opportunities for area businesses involved in provision of these types of services.
• Involves on and off-site facilities and grounds.</td><td>• May preclude small businesses because of the scale of requirements.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Provides long term customer continuity for area businesses.
• May allow local area businesses to up-scale capabilities (labour, equipment, and management).</td><td>• May require very special qualifications and security clearances given that the nuclear security requirements of the Project.
• Businesses from outside the Local Study Area may see opportunities to provide the services required.</td></tr>
</table>

Figure 34: Equipment Maintenance

<table>
<tr><td>Opportunity</td><td colspan="2">Equipment Maintenance</td></tr>
<tr><td>Aspiration</td><td colspan="2">To provide maintenance and servicing for corporate vehicles and on-site heavy equipment.</td></tr>
<tr><td>Location</td><td colspan="2">Project On-Site and Off-Site</td></tr>
<tr><td>Requirements</td><td colspan="2">• NWMO's corporate vehicles will require routine maintenance and servicing.
• Heavy equipment related to the potential Project Site will also require routine maintenance and servicing.</td></tr>
<tr><td>Connections</td><td colspan="2">• Identify local equipment maintenance and servicing companies that can support NWMO's fleet of light vehicles and heavy equipment.
• Colleges and training institutes with vehicle and heavy equipment maintenance programs</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Leverages the considerable amount of local expertise, skill and knowledge regarding the maintenance and servicing of both light and heavy equipment.
• Creates a new business opportunity for an existing local supplier.</td><td>• Need to proactively raise awareness of the potential spin-off business opportunities inherent in the Project.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Potential skilled trades career opportunity for young people resident in the area.
• Could repatriate skilled workers.
• An opportunity to apply OYAP.</td><td>• There is a high demand within the Region and beyond for light and heavy equipment mechanics and maintenance specialists.</td></tr>
</table>

Figure 35: Used Fuel Container Manufacture

Opportunity	Used Fuel Container Manufacture	
Aspiration	To locally manufacture the Used Fuel Containers that will be used by the Project.	
Location	Potentially within one of the three Study Areas (i.e., Core Study Area, Local Study Area or Regional Study Area)	
Requirements	• Determine the specifications for the container, the number and timing of requirements, and potential contractual considerations.	
Connections	• Discuss requirements with NWMO • Connect with potential manufacturers/fabricators in the Local and Regional study areas who might have an interest in this aspect of the Project. • County economic development departments • Organization of Canadian Nuclear Industries (OCNI) • Nuclear Innovation Institute	
Evaluation	**Strengths**	**Weaknesses**
	• Provides a significant long term business opportunity for a business located in the one of the Study Areas. • The Core Study Area given proximity to the Project may have a transportation advantage.	• Existing businesses in the Core Study Area may not be capable of meeting the manufacturing requirements. • Location in the Core Study Area may not offer competitive advantage logistically or financially.
	Opportunities	**Threats**
	• May allow local area businesses to up-scale capabilities (labour, equipment, and management) to take advantage of the opportunity. • A large, long-term contract awarded to a local area company creates Project acceptance, provides local jobs, and encourages workers and their families to live locally.	• Existing businesses may not be competitive with those located outside of the local area who already have the qualifications, experience, and physical capabilities to undertake the container manufacturing.

Figure 36: Food Services Company

<table>
<tr><td>Opportunity</td><td colspan="2">Food Services Company</td></tr>
<tr><td>Aspiration</td><td colspan="2">To provide food services for the Project On-Site and Off-Site operations, including the Centre of Expertise.</td></tr>
<tr><td>Location</td><td colspan="2">Project On-Site and Off-Site</td></tr>
<tr><td>Requirements</td><td colspan="2">• Contract with a company to set-up and manage a food service facility initially to service the Project Off-Site and the Centre of Expertise, and subsequently On-Site once it is up and running.
• Preference will be given to local food service companies to enter into a contract with NWMO to deliver these services.
• The selected company will commit to an initial staff complement of 50% local hires which will increase to 80% within 3 years.</td></tr>
<tr><td>Connections</td><td colspan="2">• The company will engage with either Fanshawe or Conestoga College to provide training to fully up-skill their staff.
• The company will encourage staff to engage in continuous education programs related to new technology and techniques in food services management and preparation.</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Builds capacity and offers a business opportunity to local entrepreneurs.
• Provides employment and training opportunities for locals and the potential to repatriate former residents.</td><td>• A small to mid-size local food services company may not be as competitive as a larger more established company from outside the Region.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Creates a portal showcasing signature dishes from the Mennonite community and Saugeen Ojibway Nation.
• Contributes to the skilled talent pool necessary for growth of the Tourism and Hospitality Sector</td><td>• Large-scale food service companies can most likely be more cost competitive.</td></tr>
</table>

Figure 37: Supply Chain Investment

<table>
<tr><th>Opportunity</th><th colspan="2">Supply Chain Related Investment</th></tr>
<tr><th>Aspiration</th><td colspan="2">To attract nuclear supply chain investment into the Core Study Area.</td></tr>
<tr><th>Location</th><td colspan="2">Core Study Area</td></tr>
<tr><th>Requirements</th><td colspan="2">• Identify gaps in the nuclear supply chain and identify companies not currently located in the area that can fill those gaps.
• Develop a list of current suppliers determining which ones are not operating in the area.
• Develop a business case for each opportunity.</td></tr>
<tr><th>Connections</th><td colspan="2">• Reach out to companies that can fill the supply chain gaps and are current suppliers but not operating in the area and determine their level of interest to expand.
• Reach out to the Canadian Diplomatic Posts to determine if they are aware of suitable companies that might be interested in expanding to Canada.
• Reach out to other agencies/organizations to determine if they are working with any suitable companies that might be interested in locating in Ontario.</td></tr>
<tr><th rowspan="4">Evaluation</th><th>Strengths</th><th>Weaknesses</th></tr>
<tr><td>• New investment will generate new employment opportunities.
• Helps to diversify the local economy.</td><td>• Requires a focused, sustained, and targeted effort.
• Investment attraction is expensive and takes time.</td></tr>
<tr><th>Opportunities</th><th>Threats</th></tr>
<tr><td>• Creates potential for partnerships with existing firms.
• Provides existing firms with access to new markets.</td><td>• Considerable competition amongst communities world-wide for new investment.
• Other communities like Waterloo and organizations like SOMA could become competitors.</td></tr>
</table>

7.4 Resource Use and Enhancement

Figure 38: Aggregate Supply

<table>
<tr><th>Opportunity</th><th colspan="2">Aggregate Supply</th></tr>
<tr><td>Aspiration</td><td colspan="2">To use local aggregate resources for Project construction purposes.</td></tr>
<tr><td>Location</td><td colspan="2">South Bruce and Local Study Area</td></tr>
<tr><td>Requirements</td><td colspan="2">• Identify the aggregate sources that can meet the needs of the Project with minimal transportation requirements and environmental impacts</td></tr>
<tr><td>Connections</td><td colspan="2">• Local aggregate suppliers.
• Ministry of Northern Development, Mines, Natural Resources and Forestry
• Core and Local Area works/roads departments.</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Uses resources that are available locally.
• Provides business opportunity for local suppliers, equipment suppliers and transporters of aggregate material.</td><td>• Potential transportation impacts (i.e., traffic issues, noise, dust, vibrations, wear and tear on roads etc.)
• Environmental and aesthetic issues as a result of pit operations.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• If aggregate resources are located on-site or immediately adjacent to the site, this may minimize transportation impacts to local residents and road infrastructure.
• Use of local roads may require improvements to serve the purposes of the Project but will also benefit the local communities.</td><td>• Unwanted disruption to Core and Local study areas from transportation and pit operations.
• Safety issues involving transport of materials on local roads.</td></tr>
</table>

Figure 39: Excavated Rock Management Area

<table>
<tr><th>Opportunity</th><th colspan="2">Excavated Rock Management Area</th></tr>
<tr><td>Aspiration</td><td colspan="2">To use the excavated rock for public purposes.</td></tr>
<tr><td>Location</td><td colspan="2">South Bruce and Local Study Area</td></tr>
<tr><td>Requirements</td><td colspan="2">• Determine the nature of the excavated rock and its suitability for other uses. At present it has been determined that the rock from the repository level is not concrete or asphalt quality.</td></tr>
<tr><td>Connections</td><td colspan="2">• Local aggregate suppliers and handlers
• Ministry of Northern Development, Mines, Natural Resources and Forestry
• Conservation Authorities
• Core and Local Study Area municipalities.
• County Departments</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Makes use of a resource that is a product of the underground excavations.
• Preserves the aesthetics of the area in the site vicinity.
• Allows the resource to be employed for public projects that might otherwise not be possible because of material costs.</td><td>• Potential transportation impacts (i.e., traffic, noise, dust, vibration, wear and tear on roads etc.).</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Could potentially be a revenue source if material sold to out of area interests.</td><td>• The material may not be suitable for other uses (i.e., as noted previously, rock from the repository level is not concrete or asphalt quality.)
• The disturbances and safety issues involved in transporting the material from site.
• The potential to compromise existing aggregate operations because of the availability of low-cost material.</td></tr>
</table>

Figure 40: Food Supply

<table>
<tr><td>Opportunity</td><td colspan="2">Food Supply</td></tr>
<tr><td>Aspiration</td><td colspan="2">To provide local farmers and food production companies with opportunities to supply product to cafeterias and markets associated with the on and off-site Project facilities.</td></tr>
<tr><td>Location</td><td colspan="2">Project On-Site and Off-Site</td></tr>
<tr><td>Requirements</td><td colspan="2">• Determine the food supply needs and of the Project facilities and the capabilities of the area producers to meet these needs.</td></tr>
<tr><td>Connections</td><td colspan="2">• Bruce and Huron County Federations of Agriculture
• Ontario Federation of Agriculture
• Local farmers and food manufacturers and wholesalers
• Conestoga and Fanshawe Colleges
• Ontario Food Cluster</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Supports area food producers by providing a local market.
• Gives area producers direct contact with a sizeable consumer.
• Provides learning opportunity to match production with market preferences.
• Is a natural part of the supply chain for the food services company opportunity (see Figure 36).</td><td>• Market opportunity is immediately local but of limited scale.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Area producers will learn market preferences and requirements.
• Will also provide insight into food safety requirements by being a direct supplier to an industrial/ commercial consumer.
• May provide opportunities for innovation in the production and handling of food.
• Opportunity may provide area producers with the knowledge and ability to service other markets and specific consumer entities.</td><td>• Foods supplied will need to be of high quality and pass all regulatory provisions associated with safety.</td></tr>
</table>

Figure 41: Balance of Site - Agriculture

Opportunity	Balance of Site - Agriculture	
Aspiration	To conduct agriculture on balance of site areas[6] that are suitable for agriculture. Use these areas as a laboratory to demonstrate sustainable and net positive agricultural practices.	
Location	South Bruce, Project On-site	
Requirements	• Determine site areas that are best suited for agriculture.	
Connections	• Guelph University School of Agriculture • Western University Environmental Sciences • Western Sarnia-Lambton Research Park • Bruce and Huron County Federations of Agriculture • Ontario Federation of Agriculture • Nuclear Innovation Institute • Area school boards	
Evaluation	**Strengths**	**Weaknesses**
	• Maintains agriculture on areas of site most suitable for agriculture. • Makes the agricultural area an in-field laboratory for testing and demonstrating sustainable and net positive agricultural practices. • Allows for comprehensive on-site monitoring of potential effects of Project activities on agriculture.	• Will change farming on the Project On-site lands from a focus on commercial production to one of research and development.
	Opportunities	**Threats**
	• Could attract visitors that are actively involved with sustainable agriculture research and production • Could attract agriculture businesses that are involved with equipment, crops and inputs. • Provides a demonstration project and learning opportunity. • Is a positive initiative in the fight against climate change. • Can be a centre for agricultural innovation.	• Institutions may not be interested in the opportunity as they have in-field research lands and facilities elsewhere.

[6] In terms of the Project on-site area, the 'Balance of Site' refers to all locations outside of the Protected Areas but inside the outer perimeter fence.

Figure 42: Balance of Site – Wilding

Opportunity	Balance of Site - Wilding	
Aspiration	To introduce wilding on balance of site areas that are of marginal use for agriculture.	
Location	South Bruce, Project On-site	
Requirements	• Determine site areas that are appropriate for re-wilding	
Connections	• Saugeen Valley and Maitland Valley Conservation Authorities • Guelph University School of Agriculture • Western University Environmental Sciences • Western Sarnia-Lambton Research Park • Bruce County Federation of Agriculture • Ontario Federation of Agriculture • Ontario Woodlot Association • Nuclear Innovation Institute • Area school boards	
Evaluation	**Strengths**	**Weaknesses**
	• Returns areas to nature. • Enhances environmental diversity and quality in local area • Provides undisturbed habitat for flora and fauna.	• May remove some land from agriculture.
	Opportunities	**Threats**
	• Could be synergistic with trail system (Figure 45, below) and tourism. • Offers potential for carbon off-sets. • Provides demonstration project and learning opportunity.	• Wilding may not be a priority or interest for large scale industrial agriculture. • Application of agricultural chemicals on area fields may affect wilding efforts. • Site operations may disturb wilding.

Figure 43: Agri-tech Development

<table>
<tr><td>Opportunity</td><td colspan="2">Agri-tech Development</td></tr>
<tr><td>Aspiration</td><td colspan="2">To take advantage of technologies and associated training done for the Project that may also be applicable to agriculture.</td></tr>
<tr><td>Location</td><td colspan="2">Core Study Area</td></tr>
<tr><td>Requirements</td><td colspan="2">• Understand the Project-related technologies and training aspects that may have application to agriculture (e.g., AI, robotics and alternative fuels come to mind).</td></tr>
<tr><td>Connections</td><td colspan="2">• Agri Food Canada
• Ontario Ministry of Agriculture Food and Rural Affairs
• Ontario Food Cluster
• Ontario Federation of Agriculture
• Guelph University School of Agriculture
• Western University Environmental Sciences
• Western Sarnia-Lambton Research Park
• Fanshawe and Georgian Colleges
• Nuclear Innovation Institute
• Organization of Canadian Nuclear Industries (OCNI)</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Initiative directly connects Project to agriculture which is a major economic activity and the most spatially extensive activity in the local area.
• Agriculture is rapidly being infused with robotics and AI technology.</td><td>• Will require that training facilities, staff, equipment programs and partnerships be put in place in the local area.
• While applicable to large scale agriculture, will not fit as well with smaller scale operations and Mennonite farms.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Could have far reaching benefit that extends beyond the local area.
• Could spark new innovations and applications and be a strong catalyst for research and development.
• Provides a platform that may attract international interest particularly in countries that are grappling with used nuclear fuel issues and associated community engagement and betterment.</td><td>• Institutions may feel the initiative is competitive and not wish to move beyond their current locations and programming.
• Government agencies give the initiative low priority or not be supportive at all.</td></tr>
</table>

7.5 Community Initiatives

Figure 44: Project Awareness Building

<table>
<tr><th>Opportunity</th><th colspan="2">Project Awareness Building</th></tr>
<tr><td>Aspiration</td><td colspan="2">To communicate NWMO's unique value proposition to local, regional, provincial, national, and international audiences, generate interest in the Project and garner broad-based support.</td></tr>
<tr><td>Location</td><td colspan="2">Local, Regional, Provincial, National, International</td></tr>
<tr><td>Requirements</td><td colspan="2">• Develop and deliver a program informing audiences at all levels about the R&D and career opportunities available related to the Project.
• Emphasize the efforts that NWMO is making to develop a local talent pool of skilled knowledge workers in such areas as administration, science, technology, and skilled trades.
• Build awareness, generate interest and excitement about NWMO's leading edge efforts at managing nuclear waste and use of the site.</td></tr>
<tr><td>Connections</td><td colspan="2">• Reach out to the colleges and universities operating within the Regional Study Area.
• Meet with representatives from key government departments and ministries.
• Engage the local district school boards.
• Leverage the Trade Commissioners Service and the Canadian Posts to help inform international audiences.</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Contributes to the local development of skilled trades and knowledge workers.
• Helps to retain young people in the community.</td><td>• The Collaborative and NWMO may need to be convinced as to the importance of proactively building awareness.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Creates a high-value employment alternative for young people.
• Further positions the nuclear industry as a contributor to economic, environmental, and social well-being.</td><td>• Organizations like Bruce Power are already considered to be preferred employers creating competition for skilled knowledge workers.</td></tr>
</table>

Figure 45: Regional Trail System

<table>
<tr><th>Opportunity</th><th colspan="2">Regional Trail System</th></tr>
<tr><td>Aspiration</td><td colspan="2">To capitalize on opportunities presented by the Project to develop a regional trail system</td></tr>
<tr><td>Location</td><td colspan="2">Core Study Area and Potentially Local Study Area</td></tr>
<tr><td>Requirements</td><td colspan="2">• Determine the potential location of a regional trail system and the public and private properties that would need to be accessed and acquired to enable development and operation.</td></tr>
<tr><td>Connections</td><td colspan="2">• Bruce, Huron, and Grey County Tourism Departments
• Saugeen Valley and Maitland Valley Conservation Authorities
• Pine River Watershed Initiative Network
• NWMO</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Provides a substantial area-based tourist attraction.
• Could support year-round use for hiking. biking, snowshoeing and cross-country skiing.
• Interconnects the Core Study Area and potentially Local Study Area municipalities.
• Synergistic with eateries and accommodation facilities across the area.
• Could potentially be enabled by low cost/no cost gravel sourced from the on-site excavated rock storage pile (see Figure 39, above).</td><td>• Land access and acquisition may be difficult.
• Construction and maintenance costs will need to be shared across municipalities.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Can become a tourist attraction that caters to locals as well as people from further afield.
• Can be a year-round facility.
• Could be tied into some other tourist attraction aspects of the Project (i.e., Centre of Expertise, conferencing, training, and on-site demonstration initiatives).</td><td>• Excavated rock from the potential Project Site may not be suitable for trail construction.
• May not be able to acquire or access private lands.</td></tr>
</table>

Figure 46: Day Care

<table>
<tr><td>Opportunity</td><td colspan="2">Day Care</td></tr>
<tr><td>Aspiration</td><td colspan="2">To provide Day Care for Project employees and other families in the community</td></tr>
<tr><td>Location</td><td colspan="2">Core Study Area</td></tr>
<tr><td>Requirements</td><td colspan="2">• Determine location that best serves needs of families associated with the Project and other members of the core communities</td></tr>
<tr><td>Connections</td><td colspan="2">• Bruce County Children’s Services
• Huron County Social and Property Services</td></tr>
<tr><td rowspan="4">Evaluation</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>• Helps ensure Project will not exacerbate existing day care problem.
• Provides opportunity for the broader community to also make use of service.</td><td>• Day care facility must be specifically located, and this may hinder accessibility for the broader community.
• The facility cannot meet all community are day care needs.
• There will likely be capacity limits on enrollments.</td></tr>
<tr><td>Opportunities</td><td>Threats</td></tr>
<tr><td>• Could potentially develop a “day care model” that could be deployed in other communities.
• There may be potential to share staff resources in a networked day care system.
• Centralized administration and purchasing in a networked day care system could help reduce costs.</td><td>• Area demand far outweighs the capability of the facility.</td></tr>
</table>

Figure 47: Seniors Housing

Opportunity	Seniors Housing	
Aspiration	To provide independent-living and long-term care (LTC) accommodation for seniors.	
Location	South Bruce	
Requirements	• The community has an aging population and is facing the need to provide both independent living as well as LTC accommodation for its residents. • A Project-affiliated campus development could fill the need for both as NWMO staff transition to permanent accommodation (see a description of the campus concept in the *Housing Needs and Demand Analysis Study,* Keir Corp. 2022c, e.g., Figure 27).	
Connections	• Meet with architects and designers to ensure that the Project-affiliated campus development is constructed in a manner that will facilitate its transition into independent-living and LTC accommodation. • Potential to engage the architectural and design programs at colleges and universities within the Region • Meet with facility managers with expertise in managing independent-living and LTC accommodations for seniors.	
Evaluation	Strengths	Weaknesses
	• The building can be repurposed to serve the long term needs of the community. • The community has access to a facility that will allow it to respond proactively to a social need for the long-term.	• The community and NWMO to determine the merits of a campus concept and the potential uses it could serve in the near term and long term.
	Opportunities	Threats
	• Helps meet a demand for social housing. • Creates a business opportunity for the local community. • Developing the Project-affiliated campus could also involve students through university architectural departments.	• The decision is made not to move forward with the campus concept.

7.7 Implementation

1. After identifying and considering an opportunity or a combination of opportunities, a “go/no-go” decision by the Collaborative is the precursor to implementation.

2. Decision makers need to decide what opportunities to pursue and what to reject or shelve. For those with a “go” decision, the next step hinges around “do or buy”. Will the decision makers pursue these opportunities internally using staff, or externally by retaining the services of outside expertise? This decision will most likely be tempered by the nature of the opportunity and the level and type of support and connectivity it requires.

3. For each go-forward opportunity, an implementation strategy needs to be developed. Considerations may include but are not limited to the following:

    a) Who will take responsibility for the opportunity?
    b) How long it will take to realize the opportunity and a determination of whether it is time sensitive or not/
    c) What hurdles if any need to be overcome?
    d) How will the Collaborative leverage its strengths to overcome weaknesses or counter threats?
    e) What collateral material will be required and who will be responsible for creating it.
    f) What will be the role of the private sector as a resource and/or partner?
    g) What Project-related meetings will be required with what agency, government department/ministry representatives and what will be the topic of those discussions and what will be the ask?
    h) What meetings with elected officials will be required, at what level (local, provincial, federal) and what will be the ask?

4. As the Collaborative moves forward with its economic development initiatives, it will need to put in place an Opportunities Funnel to help manage its portfolio of preferred initiatives.

5. The Funnel reflects how an organization defines and implements its economic and workforce development mandate and brings in several core functions such as:

    a) Developing a solid understanding of an area’s SWOTs.
    b) Developing a unique business case that distinguishes the area from competitors.
    c) Delivering the area’s message in an effective manner to a business audience.
    d) Establishing effective and productive intermediary relationships.
    e) Determining how success is measured and defined.
    f) Delivering responsive client servicing and after-care programs.
    g) Understanding the Region’s target markets and the key drivers influencing investment decisions in selected industries.

h) Understanding the resource capacity of an area, both financial and personnel.
i) Implementing the economic and workforce development strategy in an efficient manner.

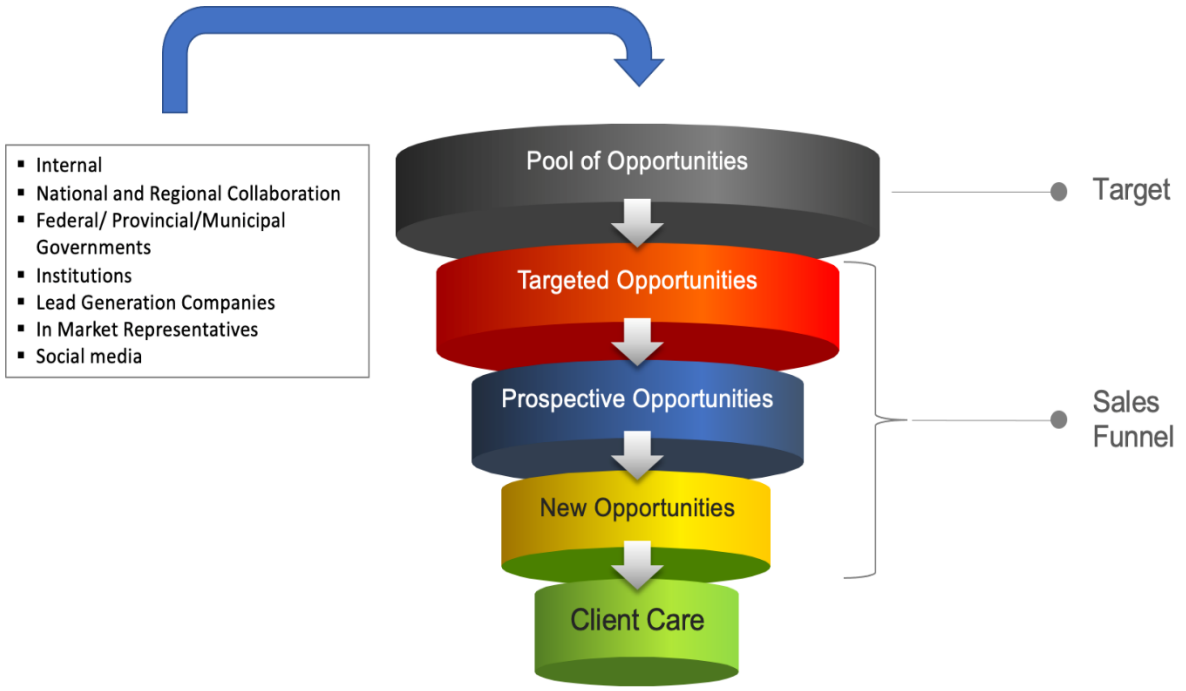
6. Prospecting activities to secure and fill the Funnel with qualified leads can include several channels as depicted in Table 13:

Table 13: Prospecting Activities and Channels

Awareness Building Campaigns	• Media Relations • Business Ambassadors • Advertising	• Social Media Platforms • Website
Qualified Lead Prospecting	• Internalized • Corporate Call Program • Agency/Government Referrals • Trade Shows/Conferences	• International Intermediary Relationships • Key Account Executives • Sector-based Associations
Investment Servicing	• Incoming Delegations	• Services to Partner Organizations (local) • Services to Partner Organizations (Int'l)

7. The Opportunities Funnel illustrated in Figure 48 includes all the opportunities that the Collaborative is currently managing at various investment ready stages.

Figure 48: The Opportunities Funnel



Source: Keir Corp after Navigate[STI] Consulting inc. (2022)

A proposed opportunity life cycle and client servicing model for the Collaborative is summarized below in Table 14.

Table 14: Opportunity Life Cycle and Client Servicing Model

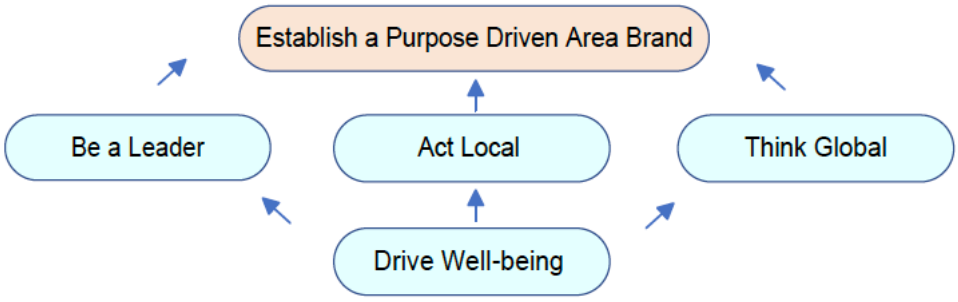
Pool of Opportunities	▪ A target list of opportunities that are not yet pre-qualified but have the right profile for the **Region**. ▪ Represents the collective opportunities that have been referred to the Collaborative through various intermediary channels, from either proactive or reactive initiatives. ▪ Companies or organizations are provided with a Business Case for locating in the Region, which is customized to their specific sector, including a high-level response that aligns with their needs.

Targeted Opportunities	▪ Pool of target opportunities that have an identified interest in establishing or expanding North American-based operations within 2-years and will consider the Region.
	▪ Companies or organizations that have been identified as having some elements of the pre-qualified criteria, including, but not limited to the following:
	  ▪ Within the Region's targeted sector(s) or interests
	  ▪ Have plans for expansion in North America
	  ▪ Have the capacity to expand operations based on number of employees, operational budget and current market share
	  ▪ Products and/or services have a potential market in North America
	  ▪ Have a current client base and sales in North America, but no physical presence
	  ▪ Expansion project timeframe for completion is within 2-3 years
	  ▪ Expansion project involves setting up a physical location and creating a minimum number of jobs over 2 years.

Prospective Opportunities	▪ Company or organization that has completed its due diligence (soft-landing) program in the Region and the project is 18 months from completion
New Opportunities	▪ New opportunities realized in the Region will be included in the Collaborative's Aftercare Program. ▪ Opportunities that are not realized will be followed-up to determine the reason. - Carry out a SWOTs analysis to identify the reasons and circumstances that led to the decision.

8. Value Proposition

Figure 49: The Value Proposition



Source: Keir Corp (2022)

1. All strategies in part and in whole must aim to create value (Figure 49). In group strategy, value is generated by the shared capabilities and assets used to successfully implement initiatives.

2. The value that needs to be generated by the Regional Economic Development Strategy and all the direct and spin-off potential opportunities is community "well-being" across the geographies served. Quite simply, well-being is created when actions and results contribute to the greater good - socially, economically, and environmentally.

3. A development like the Project creates value and contributes to the well-being of the Region through the various direct and spin-off opportunities that it can generate. Many of these have already been identified in the previous Section 7. Developing an attractive business case will position the Region and its constituents to capture those opportunities and the associated well-being for their residents and members.

4. The journey to net positive well-being is not easy it requires that the Regional Economic Development Collaborative:

    - Take responsibility
    - Serve others
    - Improve the social contract
    - Focus on livelihoods
    - Tackle the issues that matter
    - Build deep trust
    - Partner in new ways
    - Develop a "can do" culture

5. With the above in mind, Regional Economic Development is not about following - it is about leading.

6. To be a leader that is accepted by the communities served and respected by the communities interacted with, the dual talent of acting locally and thinking globally needs to be mastered.

7. The Collaborative needs to develop a business case that will attract residents and businesses to the Core Study Area. In developing that case however, they must be mindful of other communities that most likely will be competing for the same residents and businesses. Their key challenge therefore will be not only to make the business case for investment but also to differentiate their area from competitors.

8. For the last 35 years Area Development has carried out an Annual Corporate Survey asking key decision-makers what factors most influence their site selection decisions.

9. Based on the survey results the top ten quantitative and qualitative factors influencing site selection in 2019 and 2020 are summarized in the Table 15.

Table 15: Top Ten Site Selection Factors

Ranking	Site Selection Factors	Score (Rank)	
		2020	**2019**
1	Availability of Skilled Labour	91.4	92.3 (2)
2	Highway Accessibility	88.7	92.4 (1)
3	Energy Availability & Costs	85.3	79.5 (7)
4	Quality of Life	84.8	82.2 (4)
5	Labour Costs	84.2	87.1 (3)
6	Occupancy or Construction Costs	80.6	80.3 (5)
7	Corporate Tax Rate	80.0	79.7 (6)
8	Tax Exemptions	78.6	75.0 (8)
9	Incentives	77.2	70.2 (14)
10	Inbound/Outbound Shipping Costs	76.8	69.8 (15)

Source: Area Development Corporate Survey 2021

10. The due diligence associated with selecting a location that best meets the needs of a company will involve site visits by investors or their agents to engage the local business community, government officials and other business specialists. During this stage the company will want to drill down on their "Hot Button" issues which may include factors such as:

    - Availability of skilled labour
    - Business location and supply chain networks
    - Transportation logistics and costs
    - Business setup costs
    - Market conditions
    - Regulatory requirements
    - Quality of infrastructure
    - Quality of life
    - Taxation

11. The relative importance of these factors is often unique to a particular business and depends on the type of industry, the extent of current supply chains, and the key drivers encouraging expansion and growth. Understanding economic and industry trends and their impact on site selection decision-making is a key element in developing an effective business case.

12. By adopting a targeted approach, the Core Study Area can attract the type of residents, companies and investments that best meets its betterment of civil society objectives. Developing an attractive business case will need to leverage and address several key considerations such as the Region's:

    - Economic context within Canada and Ontario.
    - Proximity and access to markets.
    - Availability and cost of labour.
    - Low-risk and cost-competitive business environment.
    - World class educational institutions.
    - Leadership in innovation.
    - Incentives – R&D tax credits, economic development grants, subsidies, preferred procurement policy.
    - Extensive and superior infrastructure – availability of industrial land – residential real estate.
    - Business networks/political stability.
    - Premier quality of life.

13. At the top of the value proposition tier in the Strategy Map for Regional Economic Development (Figure 20) is "Brand". This is a summative entity that embodies the fundamental beliefs underpinning the Collaborative, its purpose, and its culture.

14. Purpose is the reason for the Collaborative and what it is trying to accomplish. It is essential that purpose motivates people and helps direct strategy and priorities toward opportunities.

15. Culture is the how the organization channels its beliefs and purpose into behaviours. The latter make value propositions come alive through focused aspirations, coordinated pursuit of initiatives and delivery of outcomes in the geographies served.

16. Brand becomes identity - the more people are proud and motivated by what is being pursued and accomplished, the stronger the brand becomes and the more compelling its overarching value proposition.

9. Next Steps

Implementing an economic development strategy represents a serious commitment of resources. Its success depends upon a dedicated team with shared goals and objectives mobilized from within the community. The following guidelines highlight some key considerations and suggest a program for moving forward if the Project is located in South Bruce.

1. Confirm that the potential Partners see merit in pursuing development of an economic development strategy for the Project and initiating further efforts to that end.

2. Develop a value proposition (see Section 8, above) that identifies how NWMO, the municipalities of South Bruce, Brockton, Huron-Kinloss, North Huron and Morris-Turnberry and SON (the Partners) both individually and collectively benefit from being part of the Collaborative.

3. The value proposition should also provide an overview of the potential economic, workforce and innovation opportunities related to the Project and how they will enhance community well-being and emphasize the importance of being collectively proactive.

4. Using the value proposition, engage the Partners in a series of one-on-one meetings to determine if they believe they share a set of common goals and objectives aimed at economic and workforce development.

5. Use the meetings to introduce the merits of working together to achieve their shared goals and objectives and to obtain their approval in principle.

6. Organize a meeting that includes senior representatives from NWMO, the municipalities of South Bruce, Brockton, Huron-Kinloss, North Huron and Morris-Turnberry and SON (the Partners) to discuss the concept of establishing a not-for-profit economic development agency (the Collaborative) to promote the interests of their collective communities.

7. Discuss the role of the not-for-profit agency and how it will enable the Partners to identify, encourage and support economic and workforce development opportunities. This will also include the more innovative and indirect spin-offs related to the Project.

8. Develop a draft Memorandum of Understanding (MOU) that will be negotiated and refined by the Partners, articulating their common ground, shared interests, objectives, and funding formula.

9. Once the Collaborative is established, begin to develop connections to establish networks, select priority opportunities, develop a workplan, identify a timeline and assign responsibilities. In short: develop an implementation strategy that details how the Collaborative intends to build its brand, move forward with priority opportunities, and create well-being.

10. Summary Overview

1. This Study sets out a strategic plan for Project-associated regional economic development. It provides a guide to help ensure that economic development is undertaken with focus, collaboration, and creativity.

2. The plan emphasizes the importance of discerning desired outcomes up front. Before embarking on a journey, knowing the intended endpoint destination is essential.

3. With knowledge of the endpoint, the starting point for proactive regional economic development is about alignment, organization and management. A collaborative team needs to be assembled to execute the plan, connections need to be made and opportunities identified and vetted.

4. For opportunities that move to implementation, value propositions need to be clearly defined. Initiatives must contribute to the overarching goals and outcomes of the plan.

5. The brand of the organization becomes its identity and reflects its intent. Brand encompasses the culture of the organization and becomes synonymous with its action and accomplishments.

6. Implementing a regional economic development strategy is a serious commitment. Alignment among Partners is critical, and roles and responsibilities need to be carefully defined and formally agreed to.

7. Successful implementation of regional economic development is not by happenstance. It requires strategic planning.

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Appendix A: List of Socio-Economic Community Studies

Study Name	Study Proponent	Lead Consultant
Municipality of South Bruce Economic Development Project Effects and Strategy	MSB	Deloitte LLC
Economic Development Study on Youth	MSB	Deloitte Canada
Local Hiring Effects Study & Strategy	MSB	Deloitte LLP
Agriculture Business Impact Study	MSB	Deloitte LLC
Fiscal Impact and Public Finance Study	MSB	Watson & Associates Economists
Municipality of South Bruce Tourism Industry Effects Study	MSB	Deloitte LLC
Housing Needs and Demand Analysis Study	NWMO, MSB	Keir Corp.
Labour Baseline Study	NWMO	Keir Corp.
Workforce Development Study	NWMO	Keir Corp.
Regional Economic Development Study	NWMO	Keir Corp.
Effects on Recreational Resources Study	MSB	Tract Consulting
Local/Regional Education Study	NWMO, MSB	DPRA
Land Use Study	NWMO, MSB	DPRA
Social Programs Study	NWMO, MSB	DPRA
Emergency Services Study	NWMO	DPRA
Vulnerable Populations Study	NWMO	DPRA
Community Health Programs and Infrastructure Study	NWMO	DPRA
Aggregate Resources Study	NWMO, MSB	Keir Corp.
Infrastructure Baseline and Feasibility Study	NWMO	Morrison Hershfield
Local Traffic Study	NWMO	Morrison Hershfield
Road Conditions Study	NWMO	Morrison Hershfield

Appendix B: Inventory of Knowledge Holders Interviewed

The table below includes an inventory of Knowledge Holders interviewed in 2021 applicable to the *Regional Economic Development Study*. Names and titles have been excluded to respect the privacy of individuals.

Date	Knowledge Holder – Organization	Applicable Studies
15-Jul-21	Local farmer & Developer	*Housing Needs and Demand Analysis Study* *Regional Economic Development Study*
28-Jul-21	Four County Labour Market Planning Board	*Labour Baseline Study* *Workforce Development Study* *Regional Economic Development Study*
29-Jul-21	REALTORS Association of Grey Bruce Owen Sound	*Housing Needs and Demand Analysis Study* *Regional Economic Development Study*
29-Jul-21	Economic Development, Planning and Development, Bruce County	*Regional Economic Development Study* *Labour Baseline Study* *Workforce Development Study*
11-Aug-21	Teeswater Concrete	*Local Traffic Effects Study* *Aggregate Resources Study* *Regional Economic Development Study*
12-Aug-21	Riley Aggregates	*Aggregate Resources Study*
18-Aug-21	Bruce County, Human Services and Housing Services	*Housing Needs and Demand Analysis Study* *Regional Economic Development Study*
01-Sep-21	Grey County, Economics Development	*Labour Baseline Study* *Workforce Development Study* *Regional Economic Development Study*
02-Sep-21	Local Developer	*Aggregate Resources Study* *Housing Needs and Demand Analysis Study* *Regional Economic Development Study*
08-Sep-21	Nuclear Innovation Institute	*Labour Baseline Study* *Workforce Development Study* *Regional Economic Development Study*
09-Sep-21	Organization of Canadian Nuclear Industries	*Labour Baseline Study* *Workforce Development Study* *Regional Economic Development Study*
16-Sep-21	Bruce Power	*Emergency Services Study* *Housing Needs and Demand Analysis Study* *Labour Baseline Study* *Workforce Development Study* *Local Traffic Effects Study* *Road Conditions Study* *Regional Economic Development Study*

Date	Knowledge Holder – Organization	Applicable Studies
16-Sep-21	Huron County, Planning and Economic Development Departments	*Land Use Study* *Regional Economic Development Study* *Labour Baseline Study* *Workforce Development Study* *Housing Needs and Demand Analysis Study*
13-Oct-21	Huron County, Social and Property Services and Cultural Services	*Housing Needs and Demand Analysis Study* *Social Programs Study* *Regional Economic Development Study*
13-Oct-21	Ontario Youth Apprenticeship Program	*Local/ Regional Education Study* *Workforce Development Study* *Regional Economics Development Study*
03-Nov-21	VPI Working Solutions	*Workforce Development Study* *Labour Baseline Study* *Regional Economic Development Study*
11-Nov-21	Fanshawe College	*Workforce Development Study* *Labour Baseline Study* *Regional Economic Development Study*
15-Nov-21	Municipality of Brockton, Operations and Building and Planning Departments	*Housing Needs and Demand Analysis Study* *Regional Economic Development Study*
16-Nov-21	MSB Public Works	*Housing Needs and Demand Analysis Study* *Regional Economic Development Study*
17-Nov-21	Township of North Huron/Huron County	*Housing Needs and Demand Analysis Study* *Regional Economic Development Study*
17-Nov-21	Hydro One	*Labour Baseline Study* *Workforce Development Study* *Regional Economic Development Study*
24-Nov-21	Township of Huron-Kinloss	*Housing Needs and Demand Analysis Study* *Regional Economic Development Study*

Table 16: Key Findings from Knowledge Holder Interviews Relevant to the Regional Economic Development Study

Bruce Nuclear Generating Station	▪ Is the major driver in Bruce County's economy. ▪ Has created a bubble economy. ▪ Employs approximately 4,100 persons for operations. ▪ Most of the operating staff reside in Bruce County, particularly in Saugeen Shores and Kincardine. ▪ Most of the company's supply chain is in Southern Ontario. ▪ Bruce Power and its suppliers are recognized as good employers. ▪ Bruce Power is recruiting and training local people as these are the persons who most want to live and work in the area. ▪ Company is proactive around hiring Indigenous people and women.
MCR Project	▪ Onsite annual jobs for the MCR Project range from 1,000 to 2,300 with average around 1,600. ▪ 75% of trades are travelers (i.e., commute is more than 1 hour). ▪ 80% of travelers are staying in Kincardine and Saugeen Shores, predominately in rental accommodation. ▪ The MCR Project finishes in mid-2033 just as the APM Project starts construction. ▪ The confluence of these two projects is seen as an opportunity for area employment continuity. ▪ Encouraging/making supply chain companies locate in the area was a good idea, successful and helped win over public opinion. Over 60 companies located to Bruce, Grey, and Huron Counties. ▪ Bruce Power encouraged Bruce, Grey, and Huron Counties to work as a team.
Housing Issues	▪ There is a lack of affordable housing. ▪ Public transportation is not available for people who do not live close to work. ▪ Housing is becoming unaffordable for locals. ▪ Rental housing availability is low and rental rates are high. ▪ Landlords have a preference for renting to high wage tenants (i.e., those associated with Bruce Power and the MCR Project). ▪ The livable wage is too low. ▪ Municipal boundaries are political constructs, they are not economic boundaries. ▪ County level cooperation tends to be stronger than municipal level cooperation when it comes to economic development. ▪ Transportation and housing are always issues. ▪ The shoreline communities are becoming unaffordable for many people and as a result they are moving inland.

	▪ People in moving to local communities need to be made to feel welcome. ▪ It is the lack of housing stock in the area, not higher wages that are the main culprit for the shortage of affordable housing. ▪ Municipalities need to expand the diversity of housing being built. ▪ Building contractors are very busy across the County. ▪ Contractors are struggling to attract and retain workers given that workers can't afford to live on their wages with the high cost of shelter. ▪ Transportation becomes an issue once persons requiring assisted housing move outside of established urban environments.
County Housing	▪ 700 units in 35 buildings across Bruce County. ▪ Approximately 600 people are on a waitlist for affordable/supportive housing is 600. ▪ Of the above, approximately 38% are single people, 28% are families and 31% are seniors. ▪ There are instances where people outside the region are getting on the waitlist because of the huge waitlists in other jurisdictions. ▪ There is a need to diversify the housing stock away from single family residences. ▪ $850 per month is the low cutoff rent for affordable housing. ▪ In some communities subsidized housing carries a stigma and there is opposition to it. ▪ The focus of Bruce County when it comes to subsidized housing is in the communities with the greatest need (i.e., Saugeen Shores, Kincardine, Brockton and Wiarton).
Developer Perspectives	▪ Do not want to replicate Toronto-style development in Bruce County. ▪ Believe in big lots. ▪ Lots are sold to individuals who in turn use one of the builders in the area. ▪ Lots in Mildmay have sold in the range of $60K to $80K depending on the character of the lot. ▪ There is definitely more interest now in housing development in South Bruce then there was in the past. ▪ There is land in Teeswater that could potentially be rezoned. ▪ Significant development in Mildmay may be constrained by sanitary sewer capacity. ▪ Linear servicing costs for a new subdivision are in the range of $1000 per meter and building costs are in the range of $300 to $400 per square foot. ▪ South Bruce does not have development charges. In West Grey they are approximately $5K to $6K per unit. ▪ Successful downtowns don't just happen. Communities need to make decisions and then act.

	▪ It is difficult for towns to attract businesses to their core areas. The towns need reasons for people to shop in them. ▪ Downtowns will never be like they were in the 1960s. However, revitalization is possible - Blythe is an example. ▪ Residents in South Bruce have no issue with driving to Hanover, Walkerton or Wingham to shop. ▪ Many houses sold in the area are to local residents who are upgrading or moving within the area. ▪ There are some recent arrivals from the Greater Toronto Hamilton Area pursuing jobs. ▪ Renting is becoming prohibitively expensive. ▪ South Bruce needs to plan for future development or development will happen to them. Land needs to be development ready, and the Municipality needs to be prepared. It is no longer good enough to say, "open for business". ▪ South Bruce needs to take a targeted approach to economic development.
Post-secondary Education	▪ Majority of young people who go away to get an education don't come back because there are opportunities for them elsewhere. ▪ All the union halls are outside the local area and hence it is hard for local people to get union jobs. The majority of union jobs tend to be filled from outside the area. ▪ Unions and employers need to work together to train and place people more effectively. ▪ Colleges will work with employers to design custom training programs. ▪ Fanshawe has had a presence in the Bruce/Huron area for 10-15 years. ▪ Classes have been delivered in Goderich, Clinton, Tiverton, Saugeen Shores and on the SON reserves. ▪ Georgian and Fanshawe colleges offer a wide range of courses including hospitality, technology, and business. ▪ Recently Georgian College has become associated with OYAP programs in high schools.
Other Significant Issues	▪ Labour availability for low wage jobs is a big problem, particularly in hospitality, tourism, manufacturing, healthcare, childcare, and agriculture. ▪ Employee retention is a problem, and some employers are looking at cash incentives. ▪ There is frustration in the business community when employers train apprentices only to see them leave for Bruce Power when they get their certificates. ▪ NWMO / the Project will intrude in the job market, but it is unavoidable. It is a situation that is happening now and will continue to happen no matter the location. People naturally want to move to higher wage jobs. ▪ There is no magic solution around the issue of people moving to higher wage jobs. All levels of government will need to become involved to find a solution. Supportive programming is one avenue.

	▪ More employers need to take on apprentices. ▪ There is an acute shortage of nurses, and workers for the hospitality sector. ▪ People employed in the tourism and retail sectors can't afford to live in the area. ▪ Area daycares do not have the capacity to support demand. ▪ Area businesses are exploring potential to find staff among recent immigrants to Canada.

Appendix C: Detailed Comparison of the Study Areas by Key Economic Indicators

1 This appendix provides a detailed comparison of the three study areas with respect to key economic indicators such as population, employment, company concentration and purchasing patterns. The focus is on those industry sectors that best reflect the characteristics of the goods and services supply chain requirements of the Project as identified by NWMO.

1 Total Construction

1 Table C1 compares the economic performance of Total Construction Sector in the three study areas. The RSA accounts for 92% of the jobs and 96% of the companies in the sector, and posts a relatively strong LQ[7] of 1.77 relative to the other areas.

2 In terms of value-add, the RSA generates $3,313M compared to $268M by the LSA and $79M by the CSA. Table C1 also shows that there is a significant increase in out of area supply chain purchases moving through from the RSA to the CSA. This indicates that the Construction Sector within the RSA is almost self-reliant with little need to purchase goods and services outside of the area.

3 In the CSA however, the sector is much less self-contained and significantly more dependent on goods and services coming from outside of the study area. This higher degree of external dependency coupled with a smaller LQ suggests that the industry is not especially strong, and that the CSA does not have an advantage in this sector.

[7] *Location quotients indicate job concentrations in industry sectors relative to what would be expected across Canada. A value of 1 is the expected benchmark. Higher values show concentrations above the benchmark and lesser values indicate weaker concentrations below the benchmark.*

Table C1 Total Construction Sector - Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		72,500	5,560	1,740
Location Quotient		**1.77**	1.59	1.20
Number of Companies		16,500	626	143
Output Sales ($ M)		$ 14,215	$ 1,161	$ 330
Wages ($ M)		$ 3,173	$ 272	$ 72
Supply Chain Purchases	Total ($ M)	$ 7,729	$ 621	$ 179
	In-area (%)	77%	29%	16%
	Out of area (%)	23%	71%	84%
Value Add ($ M)		$ 3,313	$ 268	$ 79

Source: Keir Corp using data from EMSI Burning Glass (2021)

2 Residential Construction

1 Table C2 compares the economic performance of Residential Construction Sector in the three study areas. While the RSA accounts for 93% of both the jobs and companies in this sector, it posts an LQ of 1.06 which is just slightly above the benchmark. By comparison, although the CSA has fewer jobs and companies relative to the Region, it posts a significantly higher LQ. This indicates a particular strength in this industry relative to the other study areas.

2 In terms of value-add, the RSA generates $1,155M compared to $95M by the LSA and $36M by the CSA. There is a significant increase in out of area supply chain purchases moving from the RSA down to the LSA and CSA. This suggests that residential construction companies located in the CSA need to rely on goods and services obtained from outside the area. Nevertheless, the CSA does post an LQ that is significantly higher than the both the RSA and LSA, which indicates that this area has a particular strength and a concentration of companies and workers engaged in residential construction.

Table C2 Residential Construction Sector - Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		14,600	982	356
Location Quotient		1.06	1.38	**1.94**
Number of Companies		4,180	290	73
Output Sales ($ M)		$ 3,890	$ 318	$ 119
Wages ($ M)		$ 308	$ 25	$ 9
Supply Chain Purchases	Total ($ M)	$ 2,427	$ 198	$ 74
	In-area (%)	85%	39%	18%
	Out of area (%)	15%	61%	82%
Value Add ($ M)		$ 1,155	$ 95	$ 36

Source: Keir Corp using data from EMSI Burning Glass (2021)

3 Non-Residential Construction

1 Table C3 compares the economic performance of the Non-Residential Construction Sector in the three study areas. The RSA accounts for 92% of the jobs and 88% of the companies in this sector. Both the RSA and CSA post LQs of 0.89 and 0.23 respectively, which are below the benchmark and in comparison, to the LSA (1.94), well below its LQ. Both the RSA and the CSA lack strength and offer no particular advantage in non-residential construction. However, by comparison the LSA posts a significantly higher LQ indicating a particular strength and advantage in this sector.

2 In terms of value-add, the RSA generates $395M compared to $9M by the LSA and $1M by the CSA. While there is an increase in out of area supply chain purchases moving from the LSA down to the CSA, the difference is not as significant between the RSA and LSA. This suggests that the LSA can provide its non-residential construction companies with some of the goods and services they need thereby retaining a greater proportion of their expenditures. The LSA has a particular strength and a concentration of companies and workers in this sector relative to the other study areas.

Table C3 Non-residential Construction Sector - Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		4,940	360	20
Location Quotient		0.89	**1.94**	0.23
Number of Companies		739	73	13
Output Sales ($ M)		$ 1,717	$ 40	$ 5
Wages ($ M)		$ 291	$ 7	$ 1
Supply Chain Purchases	Total ($ M)	$ 1,031	$ 24	$ 3
	In-area (%)	89%	70%	58%
	Out of area (%)	11%	30%	42%
Value Add ($ M)		$ 395	$ 9	$ 1

Source: Keir Corp using data from EMSI Burning Glass (2021)

4 Total Manufacturing

1 Table C4 compares the economic performance of the Total Manufacturing Sector in the three study areas. The RSA accounts for 95% of the jobs and 93% of the companies in this sector and posts an LQ of 1.77 which is above the benchmark. The RSA, relative to the two other study areas which post lower quotients, has strength and an advantage in manufacturing. This is not surprising given that the RSA includes the municipalities of Wellington, Middlesex, Oxford, and Waterloo all of which have strong manufacturing sectors. Nevertheless, while not as significant, both the LSA and CSA do demonstrate some strength in manufacturing.

2 In terms of value-add, the RSA generates $74,972M compared to $1,487M by the LSA and $343M by the CSA. Out of area supply chain purchases increase moving down from the RSA to the CSA. Manufacturing companies located in the LSA and CSA need to spend more money outside of their respective areas for the goods and services they need to manufacture their products than their counterparts in the RSA. Both the LSA and CSA as a result experience a higher percentage of expenditure leakage when compared to the RSA.

Table C4 Total Manufacturing Sector - Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		132,488	4,863	1,294
Location Quotient		**1.77**	1.25	1.29
Number of Companies		5,300	296	84
Output Sales ($ M)		$ 128,647	$ 3,028	$ 698
Wages ($ M)		$ 7,882	$ 245	$ 66
Supply Chain Purchases	Total ($ M)	$ 45,793	$ 1,296	$ 289
	In-area (%)	59%	42%	33%
	Out of area (%)	41%	58%	67%
Value Add ($ M)		$ 74,972	$ 1,487	$ 343

Source: Keir Corp using data from EMSI Burning Glass (2021)

5 Agriculture and Forestry

1 Table C5 compares the economic performance of the Agriculture and Forestry Sector in the three study areas. The RSA accounts for 76% of the jobs and 75% of the companies in this sector and posts an LQ of 1.49 which is above the benchmark. While this demonstrates strength in the sector, the Region is surpassed by the other study areas. The LSA posts an LQ of 4.91, which demonstrates significant strength in the sector. The CSA posts an LQ of 7.78, surpassing the LSA indicating even greater strength and economic advantage relative to the two other study areas. This is not surprising since both the LSA and to an even greater extent the CSA have economies that are strongly focused on agriculture.

2 In terms of value-add, the RSA generates $3,641M compared to $427M by the LSA and $177M by the CSA. While out of area supply chain purchases increase moving down from the Region to the CSA, the expenditure leakage experienced by the LSA and CSA is in the range of 40-50 percent, much less then for many of the other industry sectors in their midst. The Agriculture and Forestry industry sectors in the LSA and CSA spend less money outside of their respective areas for the goods and services they need than do their counterparts in other sectors like manufacturing and construction. In turn, the LSA and CSA can provide this sector with the goods and services it requires and thereby retain a higher proportion of its purchasing.

Table C5 Agriculture and Forestry Sector - Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		26,920	4,586	1,872
Location Quotient		1.49	4.91	**7.78**
Number of Companies		19,225	3,721	1,159
Output Sales ($ M)		$ 7,813	$ 919	$ 381
Wages ($ M)		$ 411	$ 47	$ 19
Supply Chain Purchases	Total ($ M)	$ 3,761	$ 445	$ 185
	In-area (%)	73%	59%	45%
	Out of area	27%	41%	55%
Value Add ($ M)		$ 3,641	$ 427	$ 177

Source: Keir Corp using data from EMSI Burning Glass (2021)

6 Mining and Quarrying

1 Table C6 compares the economic performance of the Mining and Quarrying Sector in the three study areas. The RSA accounts for 93% of the jobs and 91% of the companies in this sector and posts an LQ of 0.22 which is well below the benchmark. The LSA posts an even lower LQ of 0.19. This indicates that this sector is not very strong within either area and that neither have a particular advantage in this sector. The CSA posts an LQ of 0.42 which though slightly better is well below the benchmark indicating that at the present time the CSA is marginally stronger in this sector than the other two areas.

2 The *Aggregate Resources Study* (Keir Corp., 2022) recently completed for this area identifies a number of potential sites in close proximity to the Project that could possibly supply it with aggregate. This suggests that this industry has the potential for growth which would give it the capacity to supply and service the needs of the Project.

3 In terms of value-add, the RSA generates $382M compared to $15M by the LSA and $7M by the CSA. Out of area supply chain purchases increase moving down from the LSA to the CSA. This indicates that companies in the LSA, and to a greater extent the CSA, need to purchase required goods and services from outside of their respective borders. This in turn contributes to greater expenditure leakage for the LSA and CSA relative to the RSA.

Table C6 Mining and Quarrying Sector – Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		2,138	96	55
Location Quotient		0.22	0.19	**0.42**
Number of Companies		142	8	5
Output Sales ($ M)		$ 788	$ 30	$ 15
Wages ($ M)		$ 165	$ 6	$ 3
Supply Chain Purchases	Total ($ M)	$ 241	$ 9	$ 5
	In-area (%)	69%	56%	31%
	Out of area (%)	31%	44%	69%
Value Add ($ M)		$ 382	$ 15	$ 7

Source: Keir Corp using data from EMSI Burning Glass (2021)

7 Utilities

1 Table C7 compares the economic performance of the Utility Sector in the three study areas. While the RSA accounts for only 32% of the jobs, it captures 71% of the companies in this sector and posts an LQ of 1.63 which indicates that the RSA does have some strength in this sector.

2 Not surprisingly, the LSA posts an overwhelmingly significant LQ of 21.22 demonstrating considerable strength and a significant comparative advantage in this sector. It is clearly influenced by the presence of Bruce Power and the MCR Project. Most of the companies, however, are located in the RSA which indicates its influence and capacity to continue servicing the needs of Bruce Power as well as similar nuclear-related projects.

3 The CSA posts an LQ of 0.73 which is below the benchmark, indicating that the Area has little strength, nor does it offer any particular advantage in this industry.

4 While the RSA contributes $3,363M to the value-add in this sector, the LSA generates $2,668M and accounts for the significant contribution. By comparison, the CSA contributes a mere $7M which confirms its lack of capacity to competitively service this sector of the economy.

5 Out of area supply chain purchases across all three study areas are well over 50%, demonstrating the lack of capacity even at the RSA level to supply and service all the needs of a utility-related project. The LSA in particular, where out of area purchases reach 98%, clearly demonstrates its inability to exclusively service the needs of major utility projects solely within the area.

Table C7 Utility Sector – Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		9,570	6,480	58
Location Quotient		1.63	**21.22**	0.73
Number of Companies		512	110	40
Output Sales ($ M)		$ 6,191	$ 4,888	$ 18
Wages ($ M)		$ 1,171	$ 888	$ 6
Supply Chain Purchases	Total ($ M)	$ 1,657	$ 1,332	$ 5
	In-area (%)	33%	2%	29%
	Out of area (%)	67%	98%	71%
Value Add ($ M)		$ 3,363	$ 2,668	$ 7

Source: Keir Corp using data from EMSI Burning Glass (2021)

8 Professional, Scientific and Technical Service Sector

1 Table C8 compares the economic performance of the Professional, Scientific and Technical Service Sector in the three study areas. The overwhelming concentration of employment at 97% and companies at 93% in this sector rests within the RSA. Employment and the number of companies drop off significantly for the LSA and CSA.

2 All three study areas post LQs below the benchmark, which indicates that all of the study areas are underserved, lack capacity, and offer no comparative advantage with respect to this sector. It would appear that the Project will depend to a certain extent on expertise that will be supplied from outside of the study areas but much more so in the case of the LSA and CSA.

3 In terms of value-add, the RSA generates $3,167M compared to $57M by the LSA and $18M by the CSA. Out of area supply chain purchases increase moving down from the RSA to the CSA. This corroborates what was said above: that companies in the LSA and to a greater extent CSA need to purchase required goods and services from outside of their respective jurisdictions.

Table C8 Professional, Scientific and Technical Service Sector – Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		52,116	1,290	329
Location Quotient		**0.86**	0.43	0.35
Number of Companies		16,349	888	179
Output Sales ($ M)		$ 9,098	$ 163	$ 33
Wages ($ M)		$ 2,988	$ 53	$ 3
Supply Chain Purchases	Total ($ M)	$ 2,943	$ 53	$ 12
	In-area (%)	73%	51%	39%
	Out of area (%)	27%	49%	61%
Value Add ($ M)		$ 3,167	$ 57	$ 18

Source: Keir Corp using data from EMSI Burning Glass (2021)

9 Administrative Support and Waste Management Service Sector

1 Table C9 compares the economic performance of the Administrative Support and Waste Management Service Sector in the three study areas. The overwhelming concentration of employment at 97% and number of companies at 93% in this sector rests within the RSA. Both the number of jobs and companies drop off dramatically for the LSA and CSA.

2 All three study areas post LQs below the benchmark which indicates that they are all underserved, lack capacity and offer no comparative advantage with respect to this sector. It would appear that the Project will depend to a certain extent on expertise supplied from outside of the study areas.

3 In terms of value-add, the RSA generates $1,648M compared to $41M by the LSA and $7M by the CSA. Out of area supply chain purchases increase moving down from the RSA to the CSA. This indicates that companies in the LSA and to a greater extent CSA need to purchase their required goods and services from outside of their respective areas.

Table C9 Administrative Support and Waste Management Service Sector – Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		44,694	1,774	478
Location Quotient		**0.96**	0.73	0.77
Number of Companies		5,781	259	54
Output Sales ($ M)		$ 4,453	$ 120	$ 27
Wages ($ M)		$ 1,348	$ 37	$ 10
Supply Chain Purchases	Total ($ M)	$ 1,457	$ 42	$ 10
	In-area (%)	70%	48%	36%
	Out of area (%)	30%	52%	64%
Value Add ($ M)		$ 1,648	$ 41	$ 7

Source: Keir Corp using data from EMSI Burning Glass (2021)

10 Accommodation and Food Sector Services Sector

1 Table C10 compares the economic performance of the Accommodation and Food Services Sector in the three study areas. The concentration of employment at 94% and number of companies at 92% in this sector rests within the RSA. Both the number of jobs and companies drop off dramatically for the LSA and CSA.

2 All three study areas however, post LQs below the benchmark which indicates that they are all underserved, lack capacity and offer no comparative advantage with respect to this sector. It would appear that this sector will have some difficulty to service the needs of the Project and will depend to a certain extent on expertise supplied from outside of the study areas.

3 In terms of value-add, the RSA generates $1,484M compared to $64M by the LSA and $7M by the CSA. Out of area supply chain purchases increase moving down from the RSA at 21% to the LSA at 49% and being the same for the CSA. This indicates that companies in the LSA and CSA share a similar need to purchase the goods and services from outside of their respective areas.

Table C10 Accommodation and Food Services Sector – Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		44,970	2,047	454
Location Quotient		**0.89**	0.78	0.67
Number of Companies		4,748	304	55
Output Sales ($ M)		$ 4,678	$ 175	$ 27
Wages ($ M)		$ 1,163	$ 41	$ 7
Supply Chain Purchases	Total ($ M)	$ 2,031	$ 70	$ 13
	In-area (%)	79%	51%	51%
	Out of area (%)	21%	49%	49%
Value Add ($ M)		$ 1,484	$ 64	$ 7

Source: Keir Corp using data from EMSI Burning Glass (2021)

11 Other Services Sector

1 Table C11 compares the economic performance of the Other Services Sector in the three study areas. The concentration of employment at 94% and number of companies at 92% in this sector rests within the RSA. Both the number of jobs and companies drop off dramatically for the LSA and CSA.

2 All three study areas however, post LQs below the benchmark which indicates that they are all underserved, lack capacity and offer no comparative advantage with respect to this sector. It would appear that this sector will have some difficulty to service the needs of the Project and will depend to a certain extent on expertise supplied from outside of the study areas.

3 In terms of value-add, the RSA generates $853M compared to $44M by the LSA and $12M by the CSA. Out of area supply chain purchases increase moving up from the RSA at 27% to the LSA at 67% and 80% for the CSA. This indicates that companies in the LSA and CSA share a similar need to purchase goods and services from outside of their respective areas.

Table C11 Other Services Sector – Study Area Comparison

		Regional Study Area	Local Study Area	Core Study Area
Jobs		37,521	2,293	731
Location Quotient		0.95	1.12	**1.39**
Number of Companies		11,883	767	214
Output Sales ($ M)		$ 3,554	$ 195	$ 46
Wages ($ M)		$ 1,135	$ 63	$ 16
Supply Chain Purchases	Total ($ M)	$ 1,566	$ 88	$ 18
	In-area (%)	73%	33%	20%
	Out of area (%)	27%	67%	80%
Value Add ($ M)		$ 853	$ 44	$ 12

Source: Keir Corp using data from EMSI Burning Glass (2021)

12 Health Care and Social Assistance Services Sector – Study Area Comparison

1 Table C12 compares the economic performance of the Health Care and Social Assistance Services Sector in the three study areas. The concentration of employment and the number of companies at 95% in this sector rests within the RSA. Both the number of jobs and companies drop off dramatically at the LSA and CSA, indicating that these areas lack strength, nor do they offer any comparative advantage in this sector.

2 The Local and Core Study post LQs above the benchmark, while the RSA is slightly below. This indicates that the LSA and CSA are marginally better served in terms of health care and social assistance than the RSA.

3 In terms of value-add, the Regional Study Area generates $2,888M compared to $96M by the Local Study Area and $31M by the Core Study area. Out of area supply chain purchases increase moving down from the RSA at 28% to the LSA at 59% and to the CSA at 71%. This indicates that organizations in this sector located in the LSA and CSA rely heavily on out of area suppliers.

Table C12 Health Care and Social Assistance Services Sector

		Regional Study Area	Local Study Area	Core Study Area
Jobs		109,561	4,578	1,406
Location Quotient		**0.94**	0.76	0.91
Number of Companies		12,665	542	112
Output Sales ($ M)		$ 10,130	$ 335	$ 110
Wages ($ M)		$ 4,483	$ 148	$ 49
Supply Chain Purchases	Total ($ M)	$ 2,759	$ 91	$ 30
	In-area (%)	72%	41%	29%
	Out of area (%)	28%	59%	71%
Value Add ($ M)		$ 2,888	$ 96	$ 31

Source: Keir Corp using data from EMSI Burning Glass (2021)