



# Municipality of South Bruce Economic Development Project Effects & Strategy

Deloitte LLC  
August 2022

# Contents

- Land Acknowledgement..... 3
- Peer Review Approach..... 3
- 1. Executive Summary ..... 4
- 2. Local Economy of South Bruce ..... 8
- 3. NWMO Potential Business Needs..... 14
- 4. Supply Chain Opportunities ..... 21
- 5. Economic and Commercial Development Opportunities..... 27
- 6. Potential Constraints to Industrial Development ..... 38
- 7. Community Benefits ..... 40
- 8. Enabling Economic Development ..... 57
- 9. Recommendations..... 64
- Appendix A: Study Charter ..... 66
- Appendix B: Business Gap Analysis ..... 72
- Appendix C: Detailed Benefits of NWMO Project ..... 76
- Appendix D: Studies of Community Benefits Agreements ..... 82
- Appendix E: Local Economic Development Strategy 2021..... 87
- Appendix F: SOARR Analysis (without NWMO)..... 88

© 2002 Deloitte LLP

Cover photo source: Kinectrics, PPE laundering facility, Teeswater. kinectrics.com

20220804 FINAL

## 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 Neyaashiinigiing (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.

## Peer Review Approach

The Municipality of South Bruce is responsible for the completion of the Economic Development Project Effects & Strategy. This study was undertaken by MDB Insight Inc. (which was acquired by Deloitte LLC in April 2022). It was reviewed as part of the Municipality of South Bruce Consultants Peer Review Protocol by GHD.

## 1. Executive Summary

The objectives of the Municipality of South Bruce Economic Development Project Effects and Strategy,<sup>1</sup> as outlined in the Study Charter,<sup>2</sup> were to:

- Describe the local economy of South Bruce, with special attention to the energy, nuclear, and construction sectors.
- Describe the economic and commercial development opportunities in South Bruce associated with the Nuclear Waste Management Organization (NWMO) Deep Geological Repository (DGR) Project.
- Identify strategies to encourage local economic development related to the Project.
- Identify opportunities for economic cooperation between existing South Bruce businesses and the NWMO that can result in mutual benefits.

### Guiding Principles

The Municipality of South Bruce developed 36 Guiding Principles<sup>3</sup> with community input. The principles are focused on safety for people and the environment, ensuring the Project brings meaningful benefits to the community, and ensuring the community has a voice in decision making. This study addressed these Guiding Principles:

- #10 - Socio-Economic Impacts.
- #12 - Mitigation for Businesses.
- #21 - Business Opportunities Strategy.
- #22 - Procurement Strategy.

### Methodology

The methodology for this strategy included a review of relevant documents, examination of the local economy, analysis of labour force and employment, and review of the NWMO supply-chain industry sectors. The expected contributions of potential NWMO facilities were considered, including the proposed Centre of Expertise and concepts for uses of the remaining lands around the proposed DGR site. International trends and best practices in nuclear waste management were explored, with a focus on understanding South Bruce's potential exportable goods or services if the Project were to proceed. A commercial gap assessment was also

---

<sup>1</sup> The original charter document for this study was called the Local Economic Development Study. For the purposes of clarity, the Municipality of South Bruce requested that the title of the final report be changed to the Municipality of South Bruce Economic Development Project Effects and Strategy.

<sup>2</sup> Study Charter, see Appendix A.

<sup>3</sup> Municipality of South Bruce Guiding Principles, [southbruce.ca](http://southbruce.ca)

prepared to determine potential growth in population-oriented commerce and services.

This report builds upon the previous Economic Development Strategy Update (prepared for the Municipality of South Bruce in 2021) which explicitly excluded the NWMO Project in its engagement and analysis. That report outlined three strategic objectives (Foundations and Follow-through, Agri-business Reboot, and Village Revival) and several priorities that could be implemented in the absence of the NWMO opportunity.

The Economic Development Project Effects & Strategy (prepared for the Municipality of South Bruce) and the Regional Economic Development Study (prepared for the NWMO) have been coordinated to ensure they

use common assumptions and do not result in competing strategies for maximizing the economic benefits of the Project.

### South Bruce's 2021 Economic Development Strategy Update

#### Foundations & Follow-Through

- Activate human resources to implement the strategy.
- Increase flexibility and relevance of policies and tactics.
- Accelerate infrastructure investments.

#### Agri-Business Reboot

- Lead the way in agricultural innovation.
- Enable investments in value-added, agritech, and culinary.

#### Village Revival

- Ensure villages are shovel-ready for development.
- Double-down on support for village revitalization.
- Embrace diversity in business and culture.

## Current Economic Landscape

In this report, we paint a picture of the **current economic landscape** of the area, with special emphasis on utilities and construction. Additional information is provided on other key sectors as well. The potential business needs of the NWMO are explored, including construction services, commodities, equipment, operations, and maintenance.

Supply chain opportunities are analyzed, and suggestions are provided on how existing local and regional businesses can participate in opportunities provided by the NWMO Project. Strategies are examined to attract people and new employers to the area. Additional economic and commercial development opportunities are scrutinized, sector by sector, and a detailed market threshold analysis is projected across the forecast population growth to 2031.

## Potential Economic Future

Another picture is sketched of the **potential economic future** for South Bruce. Several community benefits that could be associated with the NWMO Project, are identified, including:

- Business opportunities: new products, services, and markets; foreign investment; and improved local business resilience and capacity.
- Support for agriculture: research, local food, and culinary opportunities
- Labour force improvements: career opportunities and skilled worker attraction (supported by recommendations within the 2022 Municipality of South Bruce Local Hiring Study and Strategy (provided under separate cover).
- Resident attraction and quality of life: youth retention and repatriation, and cultural awareness.
- Increases in tourism and visitor spending.

### Benefits and aspirations of the NWMO Project

- New business opportunities.
- Business resilience and capacity building.
- Business retention and expansion.
- Climate change research and green industry opportunities.
- Cultural awareness.
- Foreign investment.
- Innovation in agriculture.
- Career and job opportunities.
- Local food and culinary opportunities.
- Resident attraction and quality of life.
- Tourism and visitor spending.
- Traffic impact mitigation.
- Youth retention and repatriation.

## Community Benefits in a Hosting Agreement

The Economic Development Project Effects & Strategy report examines the evolving and increasing use of Community Benefits Agreements (CBAs) related to large developments. By outlining experiences in other communities, several learning opportunities are summarized: governance and oversight, negotiation, environmental concerns, community and social amenities, support for small business, targeted hiring, clear understanding, timelines, monitoring, and enforcement. We look around the world at the experience of other communities related to large scale projects.

### Learning from other communities: Community Benefits Agreements

- Clear understanding.
- Governance and oversight.
- Negotiation.
- Environmental concerns.
- Community and social amenities.
- Support for small business.
- Targeted hiring.
- Timelines.
- Monitoring and enforcement.

The successful implementation of the NWMO Project is considered from the point of view of the municipality and its various partners, within the context of the 2021 report, where the NWMO Project was not included. Economic development is enabled through commitments to investment, readiness, and collaboration. All of the actors involved in next steps are explored, with special emphasis on what the Municipality of South Bruce must do to maximize the economic and community benefits associated with the Project.

A series of recommendations complete the report, related to:

- Negotiating and enforcing community benefits within the Hosting Agreement.
- Expediting local economic development outcomes, and accelerating infrastructure investments to ensure shovel-readiness.
- Helping businesses make informed decisions about their future, and promoting the community as an investment destination.
- Taking a proactive stand on the vision for agriculture's future, building agricultural innovation opportunities, and expanding the economic impact of the local tourism industry.

## 2. Local Economy of South Bruce

This section of the report describes South Bruce's economy (presumably as a whole) with focus on the utilities and construction sectors, as requested in the Study Charter (Appendix A) provided by the Municipality. The agriculture and tourism sectors are also included as they are key the subject of two separate studies: the Agriculture Business Impact Study and the Tourism Industry Effects Study.

### In a Nutshell

South Bruce has a labour force of 3,494 people.<sup>4</sup> There are 1,732 jobs in South Bruce, and most are in agriculture (483), construction (227), retail (177), and manufacturing (160).<sup>5</sup> South Bruce is a net exporter of workers, with more than 1,200 residents commuting to work in manufacturing, health care and social assistance, construction, and utilities employers primarily in the communities of Brockton, Hanover, and Kincardine. There are 361 farms and 515 farm operators in South Bruce. Soybeans cover the most acreage in South Bruce, along with corn, wheat, and hay crops.<sup>6</sup> Tourism businesses in South Bruce are highly concentrated in support services, including retail trade, restaurants, and personal services.<sup>7</sup>

### Notes on Data

This section builds on the Situational Analysis presented in the 2021 Municipal Economic Development Strategy Update and aligns with the data and sources used in the NWMO's 2022 Regional Economic Development Study Draft. The data sources used include:

- *metroeconomics*, 2022 for population, housing, and employment Base Case (without the Project) and Impact Case (anticipated Project effects) projections.
- EMSI Analyst, 2021 for industry and occupation trends.
- Canadian Business Counts, June 2021 for numbers of businesses across industries.
- Manifold Data Mining, 2020 for labour force trends.

---

<sup>4</sup> Manifold Data Mining, 2020

<sup>5</sup> EMSI, 2021

<sup>6</sup> Statistics Canada Census of Agriculture, 2021

<sup>7</sup> Economic Development Strategy Research and Analysis Report, 2021

## Introduction

In 2021, there were 1,732 jobs in South Bruce.<sup>8</sup> The agriculture sector (see Figure 1) is the sector with the most jobs in South Bruce (483 or 28% of all jobs). Between 2016 to 2021, South Bruce saw a 7% decline in local jobs. This decline was driven by job losses in manufacturing, health care, and social assistance.

South Bruce employment is forecasted to grow by 7% by 2028, adding approximately 116 jobs, with most industry sectors projected to see some growth. Sectors that are projected to see the most job growth are construction; wholesale trade; and administrative and support, waste management, and remediation services.

*Figure 1: Top 15 South Bruce Industry Sectors by Number of Jobs, 2021*

<b>Top 15 South Bruce Industry Sectors</b>	<b>2021 Jobs</b>
Agriculture, forestry, fishing, and hunting	483
Construction	227
Retail trade	177
Manufacturing	160
Other services (except public administration)	151
Wholesale trade	97
Administrative and support, waste management & remediation	78
Public administration	58
Professional, scientific and technical services	55
Educational services	49
Accommodation and food services	43
Mining, quarrying, and oil and gas extraction	42
Health care and social assistance	38
Transportation and warehousing	21
Unclassified	18

Source: EMSI Analyst, 2021

South Bruce is a net exporter of workers, with more than 1,200 residents commuting to work outside the community. Sectors that see the highest outflow of South Bruce residents are manufacturing, health care and social assistance, construction, and utilities. The main destinations for South Bruce commuters are Brockton, Hanover, and Kincardine.

South Bruce attracts approximately 415 people to work in the community, with more working in agriculture (90) and manufacturing (60) than any other sectors and primarily coming from Brockton (155), West Grey (85), and Morris-Turnberry (45).

<sup>8</sup> EMSI, 2021

The Location Quotient (LQ) is an analytical statistic that measures a region's industrial specialization relative to a larger geographic unit. In some cases, it will be used in this section to understand the impact of an industry sector. LQ Categories include:

- LQ greater than or equal to 1.25 – high concentration of occupations than the larger comparison area.
- LQ between 1.0 to 1.24 – above average concentration.
- LQ 1.0 – on par with the larger comparison area.
- LQ lower than 1.0 and higher than 0.75 – moderate concentration.
- LQ lower than 0.75 - low concentration.

### Utilities (Energy and Nuclear)

As per the Canadian Business Counts, June 2021, South Bruce's utilities sector is comprised of six businesses (1.2% of all businesses), primarily engaged in electric power generation. All of these businesses are self-employed but may still have a workforce of contracted workers, family members, or business owners.

As per Manifold Data Mining, 2020, South Bruce accounted for a labour force of 3,494 people by industry, 125 (3%) of which worked in utilities (electric power generation, transmission, and distribution), almost all of which commuted outside of South Bruce to work. Bruce County showed a utilities labour force of 4,971, representing 9% of its total labour of 36,890.

#### Employment in Utilities

125 residents of South Bruce worked in electric power generation, transmission, and distribution, almost all of which commuted outside of South Bruce to work.

In terms of the utilities sector labour force, 125 residents of South Bruce worked in electric power generation, transmission, and distribution (3% of total labour force in South Bruce) in 2020, almost all of which commuted outside of South Bruce to work.

Most of the people employed in the electric power transmission and distribution in Bruce County were in occupations such as power engineers, power systems operators, construction millwrights and industrial mechanics, electrical and electronics engineers, and cable workers in 2021. These occupations are in line with the NWMO-denoted occupational categories. While South Bruce currently has limited occupations in the sector, Bruce County accounts for over 6,300 jobs. The majority of these people work in Kincardine. Overall, the electric power generation, transmission, and distribution sector is projected to grow 6% by 2028, adding 396 jobs in Bruce County.

The major supply-chain businesses for the utility sector include building equipment contractors; manufacturing and professional and financial services including computer systems design; and financial and consulting services.

## Construction

According to the Canadian Business Counts (June 2021), 52 construction businesses were recorded in South Bruce. These are predominately micro and small-sized enterprises, employing between 1 to 9 employees. 42% of construction businesses are also sole proprietorships<sup>9</sup>.

65% of South Bruce's construction businesses are specialty trade contractors primarily engaged in trade activities generally needed in the construction of buildings and structures, such as masonry, painting, or electrical work. Building construction accounts for 15 businesses (29% of all construction businesses). Of these 15 businesses, 11 do residential building construction while the remaining do non-residential building construction (commercial, industrial, institutional, agricultural).

South Bruce's construction sector accounted for 8% of Bruce County's construction sector. When considering industry concentration using the Location Quotient (LQ) analysis, South Bruce shows an LQ<sup>10</sup> of 1.08, indicating that the sector concentration is "above average", but also on par with the County.

227 people were employed in the construction sector in South Bruce in 2021. The subsectors with the most employees were residential building construction (59) and building equipment contractors (53). In terms of the labour force, 430 residents of South Bruce worked in construction in 2020 (12% of total labour force in South Bruce).

The top occupations employed by these industries include carpenters; construction trades helpers and labourers; contractors and supervisors; other construction trades; installers, repairers, and servicers; and residential and commercial installers and servicers. These occupations are in line with the NWMO-denoted occupational categories.

The major supply chain businesses for the construction sector include architectural, engineering, and related services; manufacturing including architectural and structural metals manufacturing; petroleum and coal product manufacturing;

### Construction Sector

Construction businesses in South Bruce are predominately micro and small-sized enterprises, employing between 1 to 9 employees.

<sup>9</sup> The category may still have a workforce of contracted workers, family members, or business owners.

<sup>10</sup> See definition of LQ in Introduction of this Section.

cement and concrete product manufacturing; plastic product manufacturing; and other electrical equipment and component manufacturing.

## Agriculture

According to the Municipality of South Bruce Agriculture Business Impact Study, agriculture and agribusiness is primarily focused on the commodities of grains and oilseeds, dairy, and beef. Soil in South Bruce is high in organic matter and very efficient at draining water, qualities which are beneficial for agriculture.

Over the last decade, farmers in South Bruce grew fewer acres of crops in general. Total farm area of South Bruce was 70,657 acres in 2021, of which 54,139 acres (76%) was land in crops. South Bruce cropland dropped from 19% of Bruce County total in 2011, to 14.7% in 2021. Soybeans, corn, wheat, and hay dominate acreage, but less of these crops were recorded in 2021, compared to a decade ago.

### Agriculture

South Bruce agriculture and agribusiness is primarily focused on traditional Ontario commodities of grains and oilseeds, dairy, and beef.

There were 361 farms in South Bruce in 2021, a decrease of 55 farms since 2011. Total farm capital in South Bruce was valued at \$1.1 billion in 2021, a 91% increase in value over ten years. However, since 2016 the value increased by only 5%.

South Bruce farms had 20% fewer cattle in 2021 (19,441 animals) compared to 2011, with increases only for dairy cows (5,062, +6%). Beef cattle numbers dropped 46%. There were 665,676 total hens and chickens in South Bruce in 2021, primarily broilers and roasters, up 24% since 2011. Sheep inventories declined since 2011 in South Bruce. There were 4,000 rabbits and 3,662 goats in 2021, and the number of farms raising them has declined since 2011.

Farm sizes have changed since 2011, with increases in farms under 10 acres, farms 10-69 acres, and farms 2,240-2,879 acres in 2021. Reductions in farm sizes over the past decade were farms 70-129, 130-179, 180-239, and 760-1,119 acres.

Farms are increasingly using more agriculture technology, such as auto-steer, robotic milkers, and GPS mapping. A total of 40 farms reported direct sales to consumers.

Fruit and vegetables are not widely grown in South Bruce, but some farmers produce strawberries, grapes, pumpkins, beets, onions, cucumbers.

Most farms are run by sole proprietors, which are in decline, as well as partnerships, which have remained static. Small farms and agritourism operations, focused on direct sales, co-exist with major cash-crop operations with large acreages, who are using more technology to remain competitive. Local and provincial agricultural organizations are there to support the farming community.

As of 2020, there are approximately 669 agri-business<sup>11</sup> jobs, 40% of all jobs in the municipality. This concentration of agri-business jobs is much higher than the 11% in Bruce County and 6% in Ontario. On-farm employment made up the largest proportion of agri-business jobs with 500 jobs, followed by dairy product manufacturing (i.e., condensed dairy product manufacturing – Gay Lea), beverage manufacturing (i.e., wineries – Hoity Toity Cellars), agriculture supplies merchant wholesalers, and meat product manufacturing. Top occupations in agri-business are managers and general workers, representing nine of every ten positions. The remaining occupations are distributed among truck drivers, machine operators, and wholesale account representatives. Modest job growth between 2020 and 2025 is expected on farms, and with agriculture supplies merchant wholesalers, and meat products manufacturing. Dairy product manufacturing (e.g., condensed dairy products) and beverage manufacturing (e.g., wineries) are expected to record job losses by 2025.

The agri-business supply chain in South Bruce relies heavily on imports of pesticides, fertilizer, and other agricultural chemicals, animal food, electricity, fuel, and general freight trucking services.

## Tourism and Hospitality

Tourism and hospitality in the Municipality of South Bruce is highly concentrated in support services, including retail trade, restaurants, and personal services, according to data provided in the Economic Development Strategy Research and Analysis Report in 2021. The Tourism Industry Effects Study provides additional information on this sector in South Bruce.

In 2020, South Bruce accounted for 330 tourism-related jobs, 20% of all jobs in the municipality. This concentration of tourism jobs is similar to the average of 21% in Bruce County and 25% in Ontario.

---

<sup>11</sup> Agri-business includes the full agriculture-related value chain and not just primary agriculture.

## 3. NWMO Potential Business Needs

This section of the report describes the potential business needs of the NWMO with focus on the major component categories and the associated goods and services that need to be supplied to the Project during its various phases.

### In a Nutshell

The supply chain needs of NWMO include four major categories: construction, commodities, equipment manufacture and supply, and maintenance and operation services. Locally, there is little capacity on the nuclear construction front. With upskilling, the South Bruce construction sector could address potential non-nuclear construction needs of the Project. Business opportunities also exist for local firms to be suppliers and transporters of concrete, aggregate, and other construction materials. South Bruce's manufacturing sector may not have the capabilities to build and supply equipment, so business supports, training, and local-first thresholds would be important. Operation and maintenance services, including municipal health and emergency services, exist to a degree locally and regionally but will need to be upscaled and reinforced to support the Project.

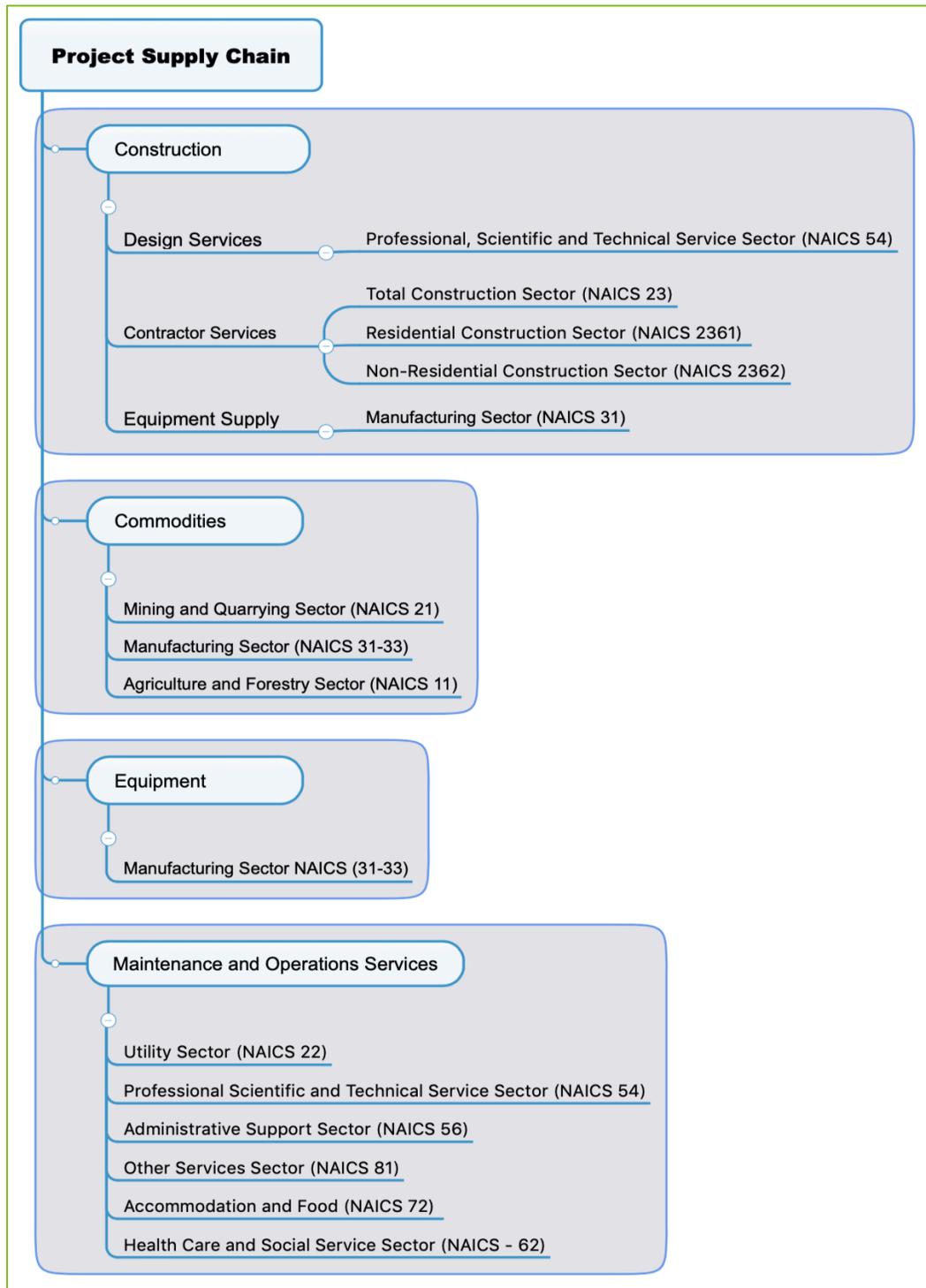
### Introduction

The supply chain for the NWMO Project was prepared through a review of the Community Planning Assumptions (NWMO, 2021) and discussions with NWMO. As illustrated in Figure 2, which is sourced from the NWMO 2022 Regional Economic Development Study, the supply chain requirements for the NWMO Project encompasses ten major industry sectors as described by the North American Industry Classification System (NAICS). The industry sectors include:

- Agriculture and forestry.
- Mining and quarrying.
- Utilities.
- Construction.
- Manufacturing.
- Professional, scientific, and technical services.
- Administrative and support, waste management, and remediation services.
- Health care and social assistance.
- Accommodation and food services.
- Other services (except public administration).

Looking at the business supply chain needs in more detail, there are four major categories: construction, commodities, equipment manufacture and supply, and maintenance and operation services.

Figure 1: Project Supply Chain Requirements by Industry Sectors



Source: NWMO 2022 Regional Economic Development Study Draft

The Project Supply Chain is further examined below with focus on the four major categories and South Bruce’s current capabilities for each. The insights from the

NWMO 2022 Regional Economic Development Study Draft are adapted to inform the analysis, considering both the nuclear and non-nuclear capabilities.

## Construction

Construction is an important supply chain sector for the NWMO Project. Within the sector, the two major services that will be required are building construction and facility infrastructure construction. The construction of residential and non-residential buildings and infrastructure facilities (i.e., water, sewer, power, roads, etc.) requires a wide range of contractor services, construction equipment supplies, and design services, including architects and engineers.

As detailed in the NWMO 2022 Regional Economic Development Study Draft, the construction sector has witnessed growth and is slated for continued growth into the future. Data shows that the Regional Study Area<sup>12</sup> (RSA) has several firms involved in building construction and facility infrastructure construction. The RSA shows considerable strength for both nuclear and non-nuclear building construction capabilities across design, contractor services, and equipment supply. Similarly, the Local Study Area<sup>13</sup> (LSA) is well positioned for non-nuclear capabilities and support nuclear capabilities related to construction. This could be attributed to the presence of Bruce Power and its local suppliers. The Core Study Area<sup>14</sup> (CSA), on the other hand, has little capacity on the nuclear construction front and there are no apparent strengths relating to the provision of infrastructure construction services or equipment supply.

When considering South Bruce specifically, the following assumptions can be made: South Bruce is home to 52 construction businesses, the majority of which are specialty trade contractors and residential construction firms. South Bruce shows a construction LQ of 1.08, indicating that the sector concentration is on par with the County. The most immediate opportunities for South Bruce related to the Project would be the construction of accommodation. Contractor upskilling should also be a priority to give the area capabilities and experience for the supply of non-residential contractor services. With upskilling and through the supply of skilled construction trades and labour, there may be opportunities for South Bruce to leverage the strength of the construction sector to address the potential non-nuclear construction needs of the Project.

### Construction opportunities

The most immediate opportunities for South Bruce related to the Project would be the construction of accommodation.

<sup>12</sup> Regional Study Area (RSA) is comprised of Bruce, Grey, Huron, Wellington, Perth, Oxford, Middlesex Counties, and the Region of Waterloo. Source: Labour Baseline Study (Keir Corp., 2022a)

<sup>13</sup> Local Study Area (LSA) is comprised of South Bruce, Huron-Kinloss, Kincardine, Saugeen Shores, Arran-Elderslie, Brockton, Hanover, West Grey, Minto, Howick, Morris-Turnberry, North Huron, and Ashfield-Colborne-Wawanosh

<sup>14</sup> Core Study Area (CSA) is comprised of South Bruce, Huron-Kinloss, Brockton, North Huron, and Morris-Turnberry

When considering the supply chain for design services, South Bruce is home to approximately 12 professional, scientific, and technical services (PSTS) businesses. The majority of these firms are non-employee establishments and South Bruce shows a very low PSTS industry concentration (LQ 0.23). The majority of PSTS firms in South Bruce are administrative management and general management consulting services. There is a lack of civil and mechanical engineering capabilities in South Bruce, which has no businesses in architectural, drafting, and building inspection services. This indicates gaps in its ability to potentially be suppliers to construction design requirements of the Project.

## Commodities

Commodities also form an important supply chain requirement for the NWMO Project. As detailed in the NWMO 2022 Regional Economic Development Study Draft, commodity requirements include:

- Aggregate.
- Concrete.
- Timber.
- Bentonite.
- Mining.
- Steel.
- Pipe and Conduit.
- Miscellaneous Building Materials.

Aggregate and concrete resources and firms will support the Project construction purposes. Since the resources would be sourced locally, business opportunities exist for firms to be local suppliers, equipment suppliers, and transporters of aggregate material. Bentonite clay is a supply requirement for the Project for processing the used fuel while timber, steel fabrication, pipe, and conduits are needed for building material production and construction.

As detailed in the Aggregate Study, aggregate, granular materials, and concrete resources and services are readily available in the three study areas. This requirement is one of the distinct products that the CSA and LSA have advantage over the Regional Study Area (RSA), because of proximity to the Project site and lower transportation costs. Given the availability of these products in the immediate vicinity of the potential Project site, the CSA enjoys a distinct locational advantage over the LSA. Similarly, the LSA and CSA have the advantage of the ability to provide timber and milling services.

The RSA has strengths in heavy steel fabrication capabilities, while both the LSA and CSA have some specialized fabrication abilities for car parts and other products. Pipe and conduit production capabilities are scarce in the CSA and are lacking in the LSA, most of these capabilities are concentrated in the RSA.

Mining services that support infrastructure construction (e.g., quarrying, grinding, pulverizing, and professional, technical, and scientific expertise related to sampling, geological observations, etc.) are constrained in the RSA and LSA. 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. There are no major capabilities in the area for the supply of these services. As per NWMO, bentonite will not be sourced from any of the three study areas and is expected to come from Wyoming, USA.

When considering South Bruce specifically, the following assumption can be made: agriculture and forestry are a key target sector for South Bruce. Within this sector, South Bruce has businesses related to forestry and logging, as well as support activities for agriculture and forestry and wood product manufacturing. However, most of them are non-employee establishments which could impede South Bruce's capabilities to provide construction commodities for the Project. Business supports and training may be needed for small businesses to participate in the Project, as well as provisions in any CBA negotiated and executed with the NWMO.

### **Business supports**

Business supports and training may be needed for small businesses to participate in the Project, as well as provisions in any Community Benefits Agreement negotiated and executed with the NWMO.

## **Equipment Manufacture and Supply**

Manufacturing is an important supply chain sector for the NWMO Project, as it relates to nuclear and non-nuclear stationary and mobile equipment manufacturing and supply. Manufacturing goods and services needed for the Project include machinery, robotics, automotive assembly, and parts and power generation equipment manufacturing.

Manufacturing is a dominant sector in the RSA; the economy is highly diversified with large and advanced manufacturing sectors, including automotive and advanced manufacturing operations. The LSA has strengths in non-nuclear stationary and mobile equipment manufacturing and supply, due to the presence of equipment dealers and rental agencies. The CSA is not currently involved in the manufacturing and supply of nuclear equipment either stationary or mobile to the nuclear industry.

### **Manufacturing needs**

Goods and services needed for the Project include machinery, robotics, automotive assembly, and parts and power generation equipment manufacturing.

When considering the manufacturing sector, South Bruce records approximately 9 firms, the majority of which are fabricated metal product and wood product manufacturing. South Bruce's manufacturing sector is dominated by non-employee

establishments and may not have the capabilities to support equipment manufacturing and supply, unless business supports, training, and local-first thresholds in Community Benefits Agreements are implemented.

## Operation and Maintenance Services

Operation and maintenance (O&M) services for the NWMO Project include:

- Nuclear O&M.
- Non-nuclear O&M.
- Municipal services including waste, sewage, and water management.
- Engineering monitoring.
- Emergency services.
- Accommodation and food services.

Non-nuclear operation and maintenance services are readily available in the Regional Study Area (RSA) and Local Study Area (LSA), but at a much more reduced scale in the latter. These services are also available in the Core Study Area (CSA) but again at a reduced scale and diversity compared to the LSA.

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.

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.

### Municipal services

Municipal service capabilities are present across the study areas but at progressively lesser levels and diminished capability moving down from the Regional Study Area to the Core Study Area.

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 demand 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 specialty of services in the other two study areas, with South Bruce Fire Rescue services being supported by volunteers. There have also been staffing shortages at the Walkerton and Chesley hospitals in recent years, causing them to close for periods of time.<sup>15</sup>

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

<sup>15</sup> Bayshore Broadcasting news item, June 2022, [bayshorebroadcasting.ca](http://bayshorebroadcasting.ca)

accommodation and food service establishments, but they are limited in number and location. See Figure 3.

South Bruce's utilities sector is comprised of establishments, primarily engaged in hydro-electric power generation or power generation using sources such as wind and solar energy. Currently, there are no nuclear electric power generation businesses in South Bruce. The sector shows an LQ of 1.18, indicating that the sector concentration is in par with the County. South Bruce is also home to five businesses in administrative and support, waste management, and remediation services. The recent establishment of the Kinectrics Laundry Facility in Teeswater provides a nuclear connection.

When considering emergency services, the Municipality has a Community Emergency Management Coordinator (CEMC) to provide centralized direction and coordination of emergency response and recovery operations.

Figure 3: Businesses by Industry related to Project Supply Chain Requirements, South Bruce

NAICS Code	Description	South Bruce Businesses		Location Quotient (LQ)	
		Counts	% of Total Businesses	Factor of Bruce County	Factor of Ontario
<b>11</b>	Agriculture and forestry	246	49%	2.03	15.10
<b>21</b>	Mining and quarrying	1	0%	2.24	1.80
<b>22</b>	Utilities	6	1%	1.18	5.88
<b>23</b>	Construction	52	10%	1.08	1.09
<b>31-33</b>	Manufacturing	9	2%	0.84	0.74
<b>54</b>	Professional, scientific, and technical services	12	2%	0.23	0.17
<b>56</b>	Administrative and support, waste management and remediation services	5	1%	0.42	0.25
<b>62</b>	Health care and social assistance	9	2%	0.38	0.25
<b>72</b>	Accommodation and food services	4	1%	0.20	0.27
<b>81</b>	Other services (except public administration)	38	8%	1.14	1.17
<b>Total Businesses for the Project Supply Chain</b>		382	77%	1.17	1.53
<b>Total Businesses by all Industries (NAICS)</b>		<b>497</b>			

Source: EMSI Analyst, 2021

## 4. Supply Chain Opportunities

This section focuses on identifying strategies to encourage local business participating in supply chain opportunities related to the NWMO Project, such as:

- Strategies for existing South Bruce businesses to become suppliers to the NWMO Project.
- Strategies to encourage potential suppliers to the NWMO Project to locate their operations in South Bruce.

Supply chain opportunities, which are directly associated with the Project, are explored separately from economic and commercial opportunities (see next section), which are more in directly associated.

### In a Nutshell

Any development of local supply chains, in relation to the Project, must be targeted to NWMO's anticipated demand needs. The pandemic has exacerbated local business challenges related to changing business models and attracting talent. There are many benefits to becoming an NWMO supplier, and local businesses see those opportunities and want to compete for them. However, stakeholders report that South Bruce suppliers have already been overlooked by the Project's assessment phase, and there may already be a lack of confidence that local firms will be awarded future contracts. Resources will be needed to build capacity among local businesses to compete, as well address infrastructure needs. NWMO has announced a series of commitments to local procurement, with conditions.<sup>16</sup>

### Introduction

The implications of COVID-19 have also raised questions about the pros and cons of a complex and lengthy international supply chain that is vulnerable to disruption. As a result, many industries are shifting towards a more localized supply chain with opportunities for South Bruce to attract new specialist suppliers. However, to be successful it is important any supply-chain development is targeted to NWMO's anticipated demand needs. Also, as noted in the 2022 Municipality of South Bruce Local Hiring Study and Strategy, the pandemic has added a layer of concern as businesses currently find it difficult to pivot their business models and attract employees. While the long-term impacts of COVID-19 are still largely unknown, the implications for employment, operations and consumer behaviour need to be monitored moving forward.

---

<sup>16</sup> Full details are available in the Memorandum of Understanding (MOU) between Municipality of South Bruce and NWMO, June 2022, [nwmo.ca](http://nwmo.ca)

Local stakeholders were consulted as part of this study<sup>17</sup> to better understand existing business constraints and potential integration between South Bruce businesses and NWMO supply chain opportunities. Interviews were conducted with business owners and industry operators and local business-support organizations.<sup>18</sup> They included businesses part of the existing nuclear supply chain, small and large-scale agricultural employers, manufacturers, directors of technology organizations, business enhancement/ training organizations, aggregate suppliers, neighbouring municipal staff, local construction company executives, and heavy equipment business managers.

If the Project proceeds, South Bruce should focus on a capacity-building program to increase local access to NWMO procurement opportunities. As per the current NWMO procurement guide, the NWMO is committed to “maximising the use of local capable suppliers from municipalities and First Nation and Métis communities in areas engaged in the APM site selection process.” Capacity building programs will focus on local business development. This will enable local firms to build sophisticated supply chains and logistical capacity and submit quality bid documents to win procurement contracts.

### What are the key benefits to becoming a supplier?

- Steady revenue.
- Potential alignment with additional industrial customers.
- Potential business partners already in the region.

## Strategies to Align Existing South Bruce Businesses to Become NWMO Suppliers

South Bruce stakeholders and businesses indicate that existing construction-related businesses have the greatest capacity to support the NWMO Project and would integrate easily into the supply chain. Skilled trade groups, homebuilders, general contractors, heavy equipment operators, and maintenance firms are available locally and have extensive knowledge and expertise to serve the needs of the Project as required. Similarly, South Bruce’s aggregate suppliers could support extraction, heavy-machinery maintenance, and well-drilling requirements of the Project.

Unfortunately, local firms were not used by NWMO for the recent execution of borehole sites, and stakeholders now lack confidence that South Bruce businesses will be awarded contracts for heavy-machinery maintenance.

---

<sup>17</sup> Individual stakeholder interviews for the South Bruce Local Economic Development Study (with NWMO) were completed throughout late March- April 2022.

<sup>18</sup> A total of 40 stakeholders were contacted and 12 agreed to participate in the interview process. COVID-19 and engagement fatigue were recognized by the project team as barriers to participation.

Stakeholders identified that businesses need to be more informed about the proposed Project scope as this is a challenge when trying to align existing local businesses with the potential supply chain. Businesses have and will continue to face difficulties to scale-up and build capacity and resources, without a clear understanding of the implications, opportunities, requirements, and impacts of the Project.

---

*"I would encourage the NWMO to demonstrate their desire to support local business with concrete commitments. This is still very unknown, so the business community is apprehensive about collaborating." – South Bruce business owner*

---

There is also hesitancy to publicly confirm interest in becoming a Project supplier due to tensions within the community. A number of companies have received threats for their support of the Project, and at least one engaged their lawyer to issue cease-and-desist letters to those opposed.

Businesses are also concerned about securing the additional labour and capital resources/liquidity that will be needed to increase capacity and scale businesses to the levels required by the Project.

## Business Vulnerabilities

Supporting businesses to become suppliers for the Project requires an understanding of their priorities and vulnerabilities.

Small operators dominate South Bruce's business base – sole proprietorships are 79% of all businesses, and small and medium businesses that employ between one to nine employees account for an additional 17%.<sup>19</sup>

These businesses are in various industries, ranging from real estate, transportation and warehousing, construction, accommodation and food services, and retail trade.

Given the volume of self-employed business operators in South Bruce with small payrolls or no staff, these businesses are susceptible to increased vulnerabilities, such as difficulties maintaining levels of service/profitability during sick days or health

### Vulnerabilities

- High incidence of self-employment.
- Competition for skilled labour.
- Business owner/operator nearing retirement.
- Municipal resources available to build capacity and support future infrastructure needs.

---

<sup>19</sup> Canadian Business Counts, June 2021

concerns. Self-employed business operators may not have the resources or capacity to quickly mobilize on new partnerships or bulk purchase opportunities to expand business revenues due to their smaller size.

As noted in the Municipality of South Bruce Local Hiring Study and Strategy, workforce shortages and increased competition for skilled and trained labour, place small businesses in a vulnerable position to effectively hire for the skillsets they need. As highlighted through consultation, local South Bruce businesses are bussing in staff from the regional service area or are reducing their operational capacity given staffing shortages.

In addition, local employers are often competing with larger and more attractive population centers for the limited labour pool. There is also an increase in the number of business owner/operators nearing retirement and businesses requiring succession planning.

The Municipality of South Bruce as a business entity could be perceived as vulnerable from an infrastructure cost perspective. The cost to fabricate the required infrastructure to support business expansion and retention requirements, as well as investment attraction initiatives, may extend beyond the financial and human resources available.

These constraints, if not addressed, will be compounded with the NWMO Project as businesses struggle to increase their labour force capacity and scale their operations to the level required to integrate themselves into NWMO's supply chain. There may also be increased competition for workers and a combative environment for South Bruce businesses, undermining the relationships and collaboration required to support an effective local supply chain.

### How Can South Bruce Support Local Businesses?

As noted in the 2022 Municipality of South Bruce Local Hiring Study and Strategy, addressing labour force constraints, enabling a supportive business growth environment, and positioning South Bruce competitively for talent development, attraction and retention is essential to enable South Bruce businesses to become suppliers to the Project. Proposed actions include:

- Partnership development with local and regional employers and workforce partners.
- Development of workforce wraparound supports, including transit, infrastructure, housing, and quality of life considerations.
- Strengthening the local talent pipeline.
- Enabling an environment supportive of business growth and expansion.
- Cultivating entrepreneurship and innovation within the Municipality.
- Talent retention and attractive readiness initiatives.
- Establish performance measures to monitor outcomes.

Additional strategies to further strengthen the capacity of existing businesses in South Bruce include:

- Negotiate and execute CBAs with NWMO to confirm local procurement thresholds and enforcement mechanisms.
- Cultivate and encourage community based entrepreneurial opportunities such as business incubation, resources, and access to capital.
- Ensure required business infrastructure (such as natural gas, broadband internet, electricity supply) is adequate for current business needs, while considering and planning for increased future capacity.
- Conduct continuous reviews of existing land use, commercial and zoning policies to ensure South Bruce is business friendly and able to effectively support growth and expansion of existing businesses.

---

*"They could bring in training for HR, for example, that local owners could participate in. Our company is small so we don't have this department but if we had a training session offered exclusively to support local entrepreneurs this would help and create buy-in with the business community." – South Bruce business owner*

---

- Through a defined communication strategy, share information related to available lands and infrastructure pre-planning requirements to support business growth (leasable warehousing, industrial lands, temporary worker housing, etc.) to existing local businesses looking to expand and or potential business investors.
- Facilitation of key public/private partnerships to support business development where applicable and appropriate.

## Commitments in Place

In a Memorandum of Understanding (MOU) signed in June 2022 between the Municipality of South Bruce and the NWMO, a commitment was put in place to implement a procurement strategy for the Project that gives preference to the selection of suppliers who can demonstrate economic benefit to South Bruce and surrounding communities.<sup>20</sup> The NWMO committed to utilizing, where appropriate, weighted evaluation criteria in its awarding of its contracts throughout the Project.

---

<sup>20</sup> MOU, June 2022, [nwmo.ca](http://nwmo.ca)

The weighted criteria or a procurement scorecard will grant merit points on several factors both financial and non-financial, including location of the business (local and Indigenous), local and Indigenous employees, joint ventures or subcontracting with local and Indigenous companies, a commitment to local “Corporate Social Responsibility,” price, type of product or service, and quality standards.

Other procurement commitments included:

- Creating and maintaining a list of local and Indigenous subcontractors and providing that list to companies interested in bidding on contracts at the beginning of the Request for Proposal (RFP) process.
- Supporting local and Indigenous companies’ marketing through the proposed local incubator hub.
- Single sourcing to local and Indigenous suppliers will be allowed within NWMO’s Procurement Process up to a maximum dollar value and within conditions stipulated within NWMO’s governance.
- RFPs or Requests for Quotations (RFQs) may be issued by invitation only on a regional basis, within conditions stipulated within NWMO’s governance.
- Reducing the requirement for three competitive quotes/proposals to two for local and Indigenous suppliers for contracts less than a maximum dollar value, where three are not available.
- Working with local business associations to ensure that the procurement process is as clear and simple to manage for local businesses as possible, understanding that a certain amount of complexity will be required.
- Discussions should be initiated to understand and confirm the definitions of words such as “local”, “regional” and “conditions”. Without them, “local” may be misinterpreted to include companies outside the Core Study Area or Local Study Area. Also, potential local and Indigenous suppliers must clearly understand if and when the requirement for reducing the number of quotes/proposals has been activated.

### Procurement commitments

- Weighted criteria granting merit points to location of business.
- Creation and maintenance of a list of local sub-contractors.
- Supports for local companies’ marketing through proposed local incubator hub.
- Single sourcing to local suppliers up to a maximum dollar value.
- Requests for Proposal (RFPs) and Requests for Quotations (RFQs) may be issued by invitation only on regional basis.
- Work with local business associations to ensure procurement process is clear and simple to manage for local businesses.

## 5. Economic and Commercial Development Opportunities

This section of the report describes the economic and commercial development opportunities in South Bruce associated with the NWMO Project, and strategies for maximizing its benefits. Economic and commercial development opportunities, which are indirectly associated with the Project, are explored separately from supply chain opportunities (see previous section), which are more directly associated.

### In a Nutshell

The most promising areas of opportunity include non-nuclear project site construction, residential housing construction, and equipment manufacturing and maintenance. South Bruce's ability to immediately mobilize on opportunities may be limited due to workforce gaps, business capacity challenges, and infrastructure needs. A market threshold analysis uncovered several business sectors that may benefit from additional businesses locating to South Bruce over the next decade, including lessors of real estate, computer systems design, financial investment activities, general freight trucking, and management, scientific and technical consulting services. Aspirational opportunities surround the potential development of surplus DGR lands and the Centre of Expertise, including agriculture and agritech, tourism, and hospitality sectors. Potential partners for the Municipality of South Bruce in developing opportunities include senior levels of government, neighbouring communities, economic development and workforce agencies, business and industry associations, employers, and others. There are many specific strategies available to encourage local businesses to participate in the NWMO supply chain, and to attract suppliers to locate their operations in South Bruce.

### Introduction

If NWMO's proposed Project were to develop in South Bruce, there would be potential economic and commercial opportunities across a variety of sectors, industries, and communities that last in various durations. This could be direct Project-related opportunities, supply chain initiatives, or spin-off and secondary economic development opportunities. Impacts would be felt throughout the community and across multiple sectors, increasing community economic stability and residential populations.

#### Focusing Opportunities:

- Construction (non-nuclear and residential).
- Equipment manufacturing and maintenance.

Taking into consideration the strengths of the current target sectors, the most promising areas to amplify economic and commercial opportunities would include construction and related manufacturing, and equipment manufacturing and maintenance. However, South Bruce's ability to immediately mobilize on opportunities associated with the Project may be limited due to constraints including labour gaps, existing infrastructure, and current zoning and land use policies.

The current business environment may not have all the right elements to support the NWMO Project but may be able to take advantage of indirect and spin-off opportunities linked to the NWMO Project. Opportunities would need to be effectively prioritized in relation to timing, viability, resource constraints, and best bet opportunities. Below are some potential opportunities that South Bruce businesses may be able to capitalize on.

## Sector-based Opportunities

### Construction

By encouraging the construction sector to become integrated into the NWMO supply chain, opportunities are created for revenue diversification (including residential to commercial construction), year-round employment for the sector workforce, and stimulation of partnerships between existing commercial firms for scaling and business growth opportunities.

- **Project site construction opportunities:** Local construction companies, general contractors, aggregate suppliers, heavy machinery equipment services, and maintenance businesses may be able to support Project site construction requirements, directly via potential local procurement thresholds or indirectly as subconsultants for larger companies.
- **Residential housing construction opportunities:** With both temporary and long-term additional housing required to support the NWMO Project, local construction, residential electrical, plumbing, landscaping, hospitality businesses, and aggregate supplier support could be required.

### Equipment Manufacturing / Maintenance

There are opportunities to grow maintenance and equipment operation trades and related skills. This talent base can perform occupations in maintenance and equipment operation trades, including heavy equipment and transport operators and machinery and equipment mechanics. Existing local suppliers can be provided with business expansion opportunities. Focusing on equipment manufacturing/maintenance within proximity to the Project will mitigate transportation costs and down time delays for out of service equipment, potentially positioning local business competitively for service retainer contracts.

## Other Opportunities

Focusing on economic and commercial development opportunities will also result in additional community wide economic benefits including:

- Increased population coming to South Bruce to live/ work in the community and the correlating increased tax base to leverage.
- Potential increase in the number of higher paying jobs in the South Bruce.
- Enhancement of a proactive-business community which encourages existing businesses operations to expand or start up.
- Additional businesses/operations attracted to creating economic opportunities and investing in South Bruce.

## Market Threshold Analysis

Market thresholds are important to determine the need for a specific population-oriented enterprise as a community grows. The threshold is based on the number of people required to support a single business establishment. In the Interim Report for this study, the Top 20 population-oriented industries with negative capacities in South Bruce were summarized.

### Population-related Business Growth

Through further analysis, the Top 20 industries were analyzed against forecast populations for South Bruce and the Core Study Area, based on NWMO-related population projections prepared by *metroeconomics*. The following Top 20 business sectors (Figure 4, next page) are

#### Over the next decade

South Bruce will need more lessors of real estate, computer systems design, financial investment activities, general freight trucking, and management, scientific and technical consulting services.

projected to experience gaps in capacity by 2031 in South Bruce and the CSA.

### Economic-related Business Growth

Other business sectors are also expected to experience gaps over the next decade, should the NWMO Project proceed. For South Bruce, these include lessors of real estate (-55); computer systems design and related services (-28); other financial investment activities (-16); general freight trucking (-14); management, scientific, and technical consulting services (-11); activities related to real estate (-9); taxi and limousine services (-8); management of companies and enterprises (-7); other professional, scientific, and technical services (-6); and business, professional, labour, and other membership organizations (-6). The full analysis is available in Appendix B, Business Gap Analysis.

Figure 4: Business Gap Analysis, 2031 Forecast

<b>Top 20 Business Sector</b>	<b>South Bruce Gap</b>	<b>Core Study Area Gap</b>
Offices of real estate agents and brokers	-23	-77
Offices of physicians	-15	-60
Full-service restaurants	-12	-49
Offices of other health practitioners	-12	-45
Legal services	-10	-39
Accounting, tax preparation	-10	-32
Offices of dentists	-7	-29
Motion picture and video industries	-5	-24
Health and personal care stores	-5	-21
Agencies, brokerages, insurance	-3	-15
Other miscellaneous store retailers	-2	-7
Special food services	-2	-6
Sporting goods, hobby stores	-2	-6
Electronics and appliance stores	-2	-4
Grocery stores	-1	0

Source: metroeconomics 2031 population forecast; Manifold Data Mining, December 2021

## Strategies for Maximizing the Economic Benefits of the NWMO Project

To maximize the economic benefits of the NWMO Project, South Bruce needs to focus on partnership opportunities with other regional and local economic development organizations, workforce entities, supply chain employers, NWMO, industry partners, education and training facilitates, and community organizations. Through partnerships, South Bruce could leverage more broadly community-based assets, local infrastructure resources, and a larger labour force to improve the strength and resiliency of the local and surrounding economy.

As identified in the 2022 Regional Economic Development Study Draft, the Core Study Area (CSA) Collaborative could multiply the economic impact and opportunities. By leveraging immediate neighbouring municipalities (i.e., Huron-Kinloss, Brockton, North Huron, and Morris-Turnberry), South Bruce may benefit from a collective approach to pursuing Project-associated economic development in the local economy.

### Collaborations

By leveraging collaborations with neighbouring municipalities, South Bruce may benefit from a collective approach to pursuing Project-associated economic development in the local economy, multiplying impact and opportunities.

### Aspirational Opportunities

Subject to NWMO’s commitment to developing the surplus DGR lands and the Centre of Expertise, the Municipality of South Bruce Agriculture Business Impact Study describes that there may be opportunities for additional supply chain partnerships and collaborations with the agriculture and tourism sectors. How these opportunities are activated will need to be discussed between the Municipality of South Bruce, NWMO, and other interested parties. These opportunities include:

- **Agritech:** South Bruce’s agricultural sector has deep knowledge, expertise, and understanding of locational agricultural challenges and opportunities. By further investing in commercial agritech development opportunities through supply chain and/or partnership with the NWMO’s Project on the surrounding site area lands or at the proposed Centre of Expertise, new clean-tech and agritech partnerships may create opportunities for local suppliers to up-scale capabilities (labour, equipment, and management).
- **Agricultural opportunities at Centre of Expertise and Project site:** Crop and tree research and development, new technology development (e.g., controlled-environment agriculture, vertical farming, hydroponics, etc.), artificial intelligence, satellites and sensors, autonomous farm equipment, swarm farming, robotics, food safety, pest control, software analysis, light and heat control, etc.) Experimental farming practices, bio-gestors for processing agricultural waste, organic farming, carbon sequestration, and aquaponics may all have opportunities for further development, research, and exploration on the lands surrounding the Project site/ centre of expertise.

### Agricultural aspirations

Experimental farming practices, bio-gestors for processing agricultural waste, organic farming, carbon sequestration, and aquaponics may all have opportunities for further development, research, and exploration on the lands surrounding the Project site and Centre of Expertise.

---

*“Every industry would benefit from the spin offs, especially agriculture. Even through it doesn’t have an obvious tie to the nuclear. Think automation, autonomous vehicles to the area supporting activities. The possibilities need to be communicated out so people can understand them.” – South Bruce business owner*

---

- **Tourism and hospitality:** Leveraging the commercial opportunities linked with tourism and hospitality (including retail and services) would be directly impacted by increased workforce volume in South Bruce. The economic opportunities may include:
  - A restaurant featuring local food and beverages at the Centre of Expertise.
  - Local artisans and food producers at the gift shop.
  - An agricultural showcase explaining the history of farming in South Bruce.
  - Indigenous exhibits and performances celebrating culture and customs at the Centre of Expertise.

- Visitor Centre providing travel information, accommodation referrals, and options to book tours and transportation.
- Hotel accommodation for visitors, as well as residences for visiting international guests.
- Innovation hub and training centre to focus on encouraging skills development and business start-ups among local entrepreneurs and young people.

Other strategies for maximizing the economic benefits of the Project include:

- The potential Collaborative could act as a facilitator to develop local partnerships to align goals and aspirations around the Project. This could include facilitation between local school districts, Four County Labour Market Planning Board, the County of Bruce, Saugeen Ojibway Nation (SON), major employers in the region, and other employment support agencies.
- Increasing trust with community residents through continued open communication about potential economic opportunities and challenges of NWMO's Project. Open Government is identified as a foundation goal of the Municipal Corporate Strategic Plan (2021-2025), to ensure that all residents and stakeholders have easy access to information and effectively participate in the democratic process.
- South Bruce and the potential Collaborative should also focus efforts to be investment ready. This includes a review of existing policies (such as wastewater, industrial lands, commercial zoning, light manufacturing corridors, noise bylaws etc.) which may impact both existing and potential suppliers/investors to ensure South Bruce is shovel ready and/or able to attract additional investment.
- Community Benefits Agreement should also be focused on monitoring and enforcing the details of any initiatives that attempt to maximize the economic benefits associated with the NWMO Project. Section 7 of the Agreement presents further information.
- As outlined in the 2022 Municipality of South Bruce Local Hiring Study and Strategy, South Bruce needs to understand and address labour force priorities, nurture partnerships with key local and regional partners, develop training and upskilling programs, improve connections with regional employers and suppliers and develop initiatives that provide workforce supports for local small businesses and entrepreneurs.

#### **Investment readiness**

Municipalities should also focus efforts to be investment ready. This includes a review of existing policies which may impact both existing and potential suppliers and investors to ensure South Bruce is shovel ready and/or able to attract additional investment.

- A foundational focus for South Bruce relates to marketing the community and the area to support talent attraction and retention.
- Develop a business attraction and investment support program, which includes involving developers, real estate agencies, marketing firms, site selectors, centralization data management and municipal planning officials to support having a single point of contact for potential business expansion, investment, or entrepreneurial support.

## Opportunities for Economic Cooperation Between Stakeholders

### What can NWMO do to capitalize on opportunities?

Prior to the South Bruce business community mobilizing on potential economic development opportunities, it would be beneficial for NWMO, in conjunction with South Bruce, to assess the capacity and willingness of business support agencies within South Bruce to support the Project. To facilitate and mobilize the above-mentioned economic development business opportunities, NWMO would be encouraged to:

- Provide clear and consistent communication to South Bruce about the types of skilled jobs and occupations which will be utilized for the Project and by suppliers within the supply chain.
- Work in partnerships with local educational institutes including training facilities, post-secondary educational facilities, and regional training centres to provide access within South Bruce to reskilling, upskilling, and additional training opportunities to further narrow the skills gap between the existing labour force and employment required for the NWMO Project.

### What can other agencies do to capitalize on opportunities?

Economic development agencies could support and capitalize on supply chain opportunities by:

- Increasing data collection efforts in relation to critically examining the labour force skills gap within the supply chain and existing South Bruce and regional businesses.
- Improve communication and education with the local community on potential and available employment opportunities within the supply chain to combat out-migration and commuting labour force.
- Establish performance measures to monitor outcomes, to support the allocation of financial and human resources to implement the initiatives.

## What are the roles of the community partners?

To ensure economic sustainability and maximize local opportunism it is essential that South Bruce leverage partnerships with both private and public sectors. Partnerships should include neighbouring municipalities, post-secondary educational institutions (universities and colleges), educational training facilities (industry-specific training programs), employment providers, business support organizations, clean energy providers, networking associations, local chambers/ business improvement associations, community future organizations, business incubators, industry associations and business stakeholders. Partnerships within economic development are an integral component in effectively parenting the development of a strong supply chain.

Partner roles may include:

- Municipalities and business support organizations facilitating and supporting business incubators/ entrepreneurial training.
- Non-profit's business support services and educational partners increasing access to relevant training for employers, especially in non-technical skills such as communication, time management, and decision making.
- Chambers of commerce and business improvement associations working in conjunction with Municipal staff to encourage local and regional promotion.
- County business support programs, working with local employment resourcing services to increase access to employer training, business planning, and service enhancement.
- Labour market planning boards, municipalities, and regional business support services collaboratively working on community and regional talent retention strategies.
- Community future organizations and industry associations supporting existing business expansion, succession planning, capital development, and product market alignment with supply chain opportunities.
- Municipalities working with entrepreneurial organizations to support Business Retention and Expansion (BR&E) and business diversification opportunities.

### Potential Partners

- Neighboring municipalities including Bruce County.
- Community Futures organizations.
- Industry associations.
- Business improvement member-based organizations.
- Educational institutions and facilities.
- Existing suppliers within the nuclear and clean energy supply chain.
- Employment services.

- County and local municipalities collaborating to ensure business-related infrastructure is adequately available within the region (i.e., water and wastewater treatment, power, broadband internet) and communities are investment-ready with adequate supplies of serviced, shovel-ready, marketable commercial and industrial development land.

## Strategies to Encourage Suppliers to Locate Their Operations in South Bruce

South Bruce needs to take targeted actions and focus initiatives to attract regional suppliers to locate in the Municipality. Opportunities with the most return on investment would be the businesses interested in becoming suppliers for the NWMO Project. South Bruce can promote locational advantages including proximity to the Project and other clean energy providers, transportation efficiencies, and guaranteed purchased agreements to encourage potential suppliers to locate their operations in the community.

It should be noted that the NWMO Project may potentially have mandatory location requirements for suppliers such as physical office locations, local hiring practices, and community reinvestment. This practice is exemplified locally within Bruce Power's nuclear supply chain requirements.

To encourage potential NWMO Project suppliers to locate their operations in South Bruce, the following focus areas would allow for increased success in attracting, retaining, and development business economic opportunities.

### Make South Bruce investment ready

- Ensure South Bruce employment lands are investment ready with potential industrial lands being defined and serviced, while also having policies in place to support future business development and growth and access to key transportation corridors.
- Cultivate accurate local data which is made available to suppliers in making informed business decisions related to investment opportunities.
- Make the community shovel ready for investment by adapting zoning, policy, and business infrastructure needs prior to seeking external suppliers to relocate to South Bruce.

### Focus on specific supply chain businesses gaps

- Knowing what business gaps exist in South Bruce and the potential supply chain. Once defined, target these businesses with the relevant data and potential opportunities they can take advantage of, by relocating to South Bruce and integrating into the NWMO supply chain. Once business gaps and data are defined, South Bruce can leverage them with targeted marketing campaigns to site selectors, developers, and potential investors.

### Ensure partnerships and expertise are available to leverage

- Enabling strong partnerships across South Bruce, throughout Bruce County, and with neighboring municipalities is necessary to facilitate regional attraction and competitive business investment.
- Increase South Bruce's visibility and involvement with the Business to Bruce program to further expand supports available for new businesses in the area.

### Make it easy to do business in South Bruce

- Facilitate resources through a working committee focused on business enhancement and attraction. The committee can streamline business development questions, limit planning red tape, and provide contact information for business owners, investors, and site selectors required throughout the business development cycle.

### Ensure the community is ready to support new/ additional businesses

- New businesses require workforce access. South Bruce can support increased workforce capacity through partnerships and strategically focusing on existing cluster businesses to determine how workforce needs can be leveraged collectively across similar industries.
- Appropriate public infrastructure and amenities must be in place to ensure new businesses can invest in South Bruce. Developing a plan for increased requirements on transportation systems, housing, recreational amenities, commercial corridors, downtown development through existing programs including "Spruce the Bruce" should be examined.

### Leverage existing supply chain integrations

- Review the existing local nuclear supply chain program and indicate additional ways suppliers could create revenue diversification opportunities by supporting additional clean energy initiatives with similarities but different timelines.

### Utilize networking opportunities

- Leverage energy and industrial based membership organizations to facilitate network opportunities with other clean energy clusters and affiliations both in the regional service area and more broadly. Networking specifically to the known supply chain business gaps can be an effective strategy to position and highlight South Bruce as an attractive and shovel ready community for business expansion and relocation opportunities.

## 6. Potential Constraints to Industrial Development

This section identifies any potential constraints to commercial and industrial development in South Bruce.

### In a Nutshell

Constraints directly limit the ability to create a sustainable supply chain and to improve local economic development in South Bruce. Constraints identified include competition for labour force, lack of industrial land, limited infrastructure capacity, lack of diverse and affordable housing, limited municipal financial and resource capacity, and environmental concerns.

### Introduction

If NWMO's proposed Project were to develop in South Bruce, there would be constraints to commercial and industrial development for current and future business opportunities need to be factored into supply chain evaluation. Constraints may be impacting current business activities, as well as the sustainability of future business growth in South Bruce.

Constraints have broader implications especially as they relate to workforce development, youth hiring, regional economic development, agriculture, and tourism. Each of the complimentary studies highlights in detail the prevalent constraints impacting each study's area of focus.

Constraints which will directly limit the ability to create a sustainable supply chain and local economic development in South Bruce include:

- Availability of industrial lands and any restrictions on their use.
- Implications of Bruce County's Growth Management Plan, as connected with:
  - Availability and affordability of housing.
  - Enhanced quality of life.
  - Amenities.

### Potential Constraints

- Availability and affordability of housing.
- Enhanced quality of life.
- Amenities.
- Environmental concerns.
- Financial sustainability of maintaining an increased tax base.
- Municipality's capacity to deliver the increase in business supports required
- Restrictions on wastewater and current land use policies.
- Limited infrastructure capacity.
- Competition for skilled labour force
- Lands available for agriculture opportunities on the Project site are restricted by current Official Plan

- Infrastructure growth vs incremental demand.
- Environmental concerns related to the Project may become both a perceived and realized constraint on development.
- The financial sustainability of maintaining an increased tax base created by new residents may impede and accelerate tax base planning for the Municipality when planning for future infrastructure enhancements.

Other constraints include:

- The Municipality's capacity to deliver the increase in business supports required, including pre-development costs associated with the Project.
- The required administration permits and detailed studies to be completed by individual businesses for business expansion along MTO highways or owned areas.
- Restrictions on wastewater and current land use policies (see Land Use Study under separate cover).
- Limited infrastructure capacity to add/ expand additional industry to the region (see Infrastructure and Road Conditions studies under separate cover):
  - Water and sewage treatment.
  - Roads and bridges.
  - Drainage.
  - Utilities (electricity, natural gas).
  - Hospitals, schools, and daycares.
  - Internet.
  - Public transit.
- Competition for skilled labour force access within proximity.
- The existing workforce currently has limited capacity to further service NWMO occupational categories such as senior management occupations, engineering, architecture, science and information systems, administrative services managers, managers in transportation, and managers in natural resources production.
- The lands available for agriculture opportunities on the NWMO surplus lands are restricted by current Official Plan regulations, environmental sensitivities, aggregate deposits, etc., which will require careful thought around the highest and best use related to activities near the DGR.

## 7. Community Benefits

This section describes potential community benefits and aspirations associated with the NWMO Project and discusses Community Benefits Agreements.

### In a Nutshell

From the perspective of local acceptance, the ultimate goal of the NWMO Project would be for the Deep Geological Repository eventually to become a source of community pride. The path to that goal involves successful execution of the Project and leveraging of community benefits generated by the Project. Benefits may include new business opportunities, business resilience and capacity building, career and job opportunities, attraction of residents to South Bruce's quality of life, public infrastructure upgrades, youth retention and repatriation, and support for agriculture and tourism. Community Benefits Agreements provide a foundation upon which desired outcomes can be described and performance measures confirmed. The most effective approach will include careful and clear negotiation, annual monitoring and public reporting requirements, the ability to investigate complaints of noncompliance, and clear enforcement mechanisms if community benefits targets are not met.

### Introduction

There are several potential community benefits associated with the NWMO Project based on the NWMO's 2022 Regional Economic Development Study Draft. These benefits may be generated if the best-case scenario occurs in the NWMO Project.

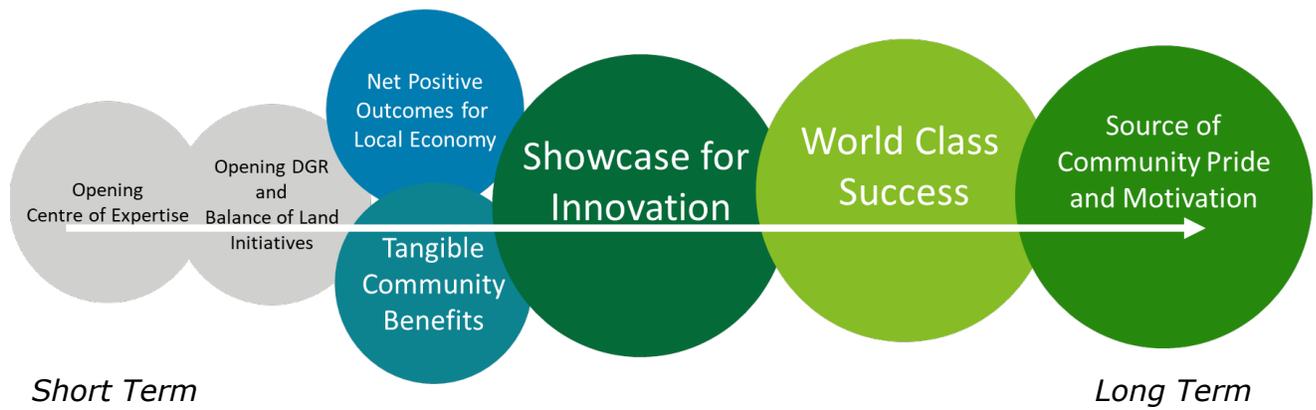
The Regional Economic Development Study also outlines the desired outcomes from which the community benefits will flow. These outcomes revolve around the Project ideally becoming a source of community pride and motivation. In the spectrum of desired outcomes, the penultimate goal will be manifested through the Project achieving world-class success, which would include becoming a showcase for innovation.

#### Desired Outcomes

- Ideally the Project would eventually become a source of community pride and motivation.
- Net positive outcomes for the local economy need to be demonstrated.
- There must be evidence of tangible community benefits; only then does world-class success matter.

To achieve those goals, the Project must demonstrate net-positive outcomes for the local economy (e.g., more jobs with better compensation, new local employers, business expansions related to employment and growth) and provide tangible community benefits (e.g., better community amenities and community health and safety). The main drivers of enabling those intermediate outcomes will be the construction and eventual opening of the DGR, preceded by the opening of the Centre of Expertise. Additionally, the potential for experimental agricultural research initiatives on the balance of DGR lands, as noted in the Agriculture and Agribusiness Impact Study (under separate cover). Figure 5 illustrates the spectrum of desired outcomes.

Figure 5: Desired Outcome Spectrum



Assuming the Project goes forward and the additional spin-off facilities (Centre of Expertise, balance of DGR land activities) are implemented, the potential range of net positive outcomes and tangible benefits are summarized as follows.

They have been divided into “community benefits” and “community aspirations”. Benefits are more obvious outcomes that may happen with little advocacy and effort on the part of the Municipality of South Bruce. Aspirations will require tenacity and leadership on the part of community and business leaders to secure tangible financial commitment from NWMO and senior levels of government.

## Community Benefits

### 1: New business opportunities

Local and regional businesses have the potential to develop and offer new products and services to the NWMO and develop and grow other markets as a result. Several areas of the Project may be ripe for product and service supply: aggregate, supply chain related investment, engineering service offices, construction supervision, inspection and testing, equipment maintenance, construction, food services, office building and grounds maintenance, used fuel container manufacturing, housing, day care, and opportunities around the excavated rock pile.

### 2: Business resilience and capacity building

Several aspects of the Project may allow local businesses to up-scale their knowledge, viability, and capabilities, related to almost every aspect of NWMO's operations. This will require businesses to learn about procurement processes, explore the black boxes of NWMO (used-fuel containment and underground operations), and stay alert to opportunities.

### 3: Business retention and expansion

Existing businesses in South Bruce and the region (aggregate, transportation, retail, food services, maintenance) may expand their operations through NWMO procurement. South Bruce will be able to retain more of its business sector, another key positive.

### 4: Career and job opportunities

The Project will provide numerous career opportunities for residents of South Bruce and the region. Residents will be exposed to new employment options and skills development opportunities. NWMO and its supply chain may create a high-value employment alternative for young people, which will help to retain them in South Bruce or repatriate them from elsewhere.

### 5: Resident attraction and quality of life

Population forecasts show that the Project will attract new residents. Employers should encourage workers to live locally, which, in turn, will help to retain wealth within South Bruce, building critical mass to support community amenities and business demand. More jobs will attract and retain young people and newcomers, creating more demand for housing and other services.

## 6: Public infrastructure upgrades

The Project is likely to accelerate infrastructure upgrades (water, wastewater, roads, bridges, power, natural gas, internet, etc.) which will spur other community benefits. Roads may be altered or improved to separate travelling public from industrial traffic. Public transportation or DGR-related shuttles could be explored to minimize disruption of local residential, commercial, and agricultural traffic.

## 7: Youth retention and repatriation

Young people will have the opportunity to pursue careers in construction, excavation, manufacturing, supply-chain industries, office roles, maintenance, hospitality, and food services. There may be opportunities in information technology, agritech development, tourism, and recreation. Improvements in housing and childcare could create models that help young people stay in the community to work and raise a family. If a Community Benefits Agreement is negotiated to include a “hire local first” provision, educational institutions may work closely with the Project to involve students and place them in careers locally.

## 8: Innovation in agriculture

In the recently executed Memorandum of Understanding (MOU) with the Municipality of South Bruce, NWMO committed to providing funding to establish a local innovation and technology incubator hub that would help support local entrepreneurs, small businesses, and start-ups.

“Key areas of support include business acceleration, services to agricultural technology companies, connecting local entrepreneurs and farmers with scientific and technical, industry knowledge, business savvy experts, and influencers.”<sup>21</sup>

The proposed Centre of Expertise and agricultural research and development opportunities on the balance of the DGR lands could be a strong catalyst for agritech research and development (e.g., new technologies and practices, autonomous farm machinery testing, food safety, vertical farming, robotics, drones, artificial intelligence) providing a platform that may attract international interest. New apprenticeship programs could also be leveraged to encourage young workers to consider agriculture, agri-business, and food technology as a career.

## 9: Tourism and visitor spending increases

Increased employment and spending on the Project may support a demand for tourist accommodation and hospitality investments. NWMO operations should encourage visiting dignitaries and guests to stay and spend locally. Agritech projects will attract niche visitor markets related to research and development

---

<sup>21</sup> Memorandum of Understanding between NWMO and Municipality of South Bruce, June 2022, [nwmo.ca](https://www.nwmo.ca)

(R&D), students, and visiting corporate representatives. The Centre of Expertise will provide benefits related to food services, and potential local food connections with farmers, chefs, and cultural groups. Returning the balance of site to a natural setting may help build out more trails and recreation activities. Using the excavated rock pile, a world-class rock sculpture park at the Centre of Expertise could boost tourism interest. Friends and relations of NWMO staff will spend when they visit. The training and conference facility may create a market for international tourism and attract conferences and corporate markets. The MOU between NWMO and the Municipality of South Bruce specifically references tourism:

“The Municipality of South Bruce will develop a tourism plan based on the Tourism Industry Effects Study and strategic recommendations from local tourism providers. The plan will include the NWMO’s Centre of Expertise becoming a tourist destination in the region. There is also the opportunity for the Municipality to partner with the NWMO on future underground tours of the facility. The Municipality and NWMO will negotiate a funding agreement to support the tourism plan.”

### 10: Local food and culinary tourism opportunities

Food-related business opportunities will develop with the Project, to feed the large number of new employees, contractors, and visitors. Increased spending and demand may attract investment for more restaurants. There will be opportunities to build links between local terroir, chefs, farms, and food production and processing. The Centre of Expertise may become a portal showcasing dishes from the Saugeen Ojibway Nation communities and other local sources. Local skills development and apprenticeship programs may strengthen the talent pipeline to the hospitality industry. Agritech may develop synergies with food production, food services, and culinary.

## Community Aspirations

### 1: Foreign investment

It is likely that Canadian companies may not have the capacity to fulfil all opportunities related to the Project. That may mean attracting new, foreign investment to South Bruce for new technologies and processes. An agritech incubator could involve international food production and processing investment. The training and conference facility may create synergies between global enterprises, educational institutions, and research and development (R&D) projects. In the absence of domestic developers, offshore investment may consider building new and diverse affordable housing.

### 2: Supporting climate change research and green industry opportunities

If NWMO facilities are constructed, there will be opportunities to utilize green architectural designs, and to find synergies between the Project and climate change

initiatives. If there are agritech research and development (R&D) facilities, studies and demonstrations can be enabled to use technologies to mitigate climate change, or advances in remote driver facilities in collaboration with the University of Waterloo. Returning some of the lands adjacent to the DGR site to nature offers the potential for carbon off-sets, as noted in the Regional Economic Development Study. NWMO facilities could showcase new technologies and build circular economy initiatives into products and services they purchase. Balance of Site opportunities (Agriculture and Wilding) could feature demonstration projects and learning opportunities. The potential of the excavated rock pile should be explored for opportunities associated with extracted minerals. The training and conference facility at the Centre of Expertise could organize programs and events

### 3: Cultural awareness

The Project could incorporate conservation and Indigenous learning opportunities, showcase agricultural heritage, and provide the opportunity for local food producers to serve the Project and other markets.

Appendix C, Detailed Benefits of NWMO Project, outlines in greater detail the specific opportunities available to South Bruce and the surrounding area, categorized into four themes: supply chain, resource use and enhancement, training and recruiting, and community initiatives.

### Community Benefits in a Hosting Agreement

The Municipality of South Bruce, if willing to host the DGR, would negotiate a Hosting Agreement with the NWMO. A Hosting Agreement may act as a Community Benefits Agreement (CBA) or it may be negotiated in more detail in a separate agreement.

Within the lexicon of the world of community benefits, a CBA is a “contract between a developer and community-based organizations representing residents’ interests. The agreement spells out the benefits the community will receive in return for supporting the developer’s project in their community.”<sup>22</sup>

CBAs have also been characterized as “deals between developers and coalitions of community organizations, addressing a broad range of community needs — they allow community groups to have a voice in shaping a project, to press for community benefits ... and to enforce developer’s promises.”<sup>23</sup> CBAs achieve community benefits from infrastructure and development projects and are

---

<sup>22</sup> Local Initiatives Support Corporation, Community Benefits Agreements Toolkit, [lisc.org](https://www.lisc.org)

<sup>23</sup> Good Jobs First, Community Benefits Agreements: Making Development Projects Accountable, [goodjobsfirst.org](https://www.goodjobsfirst.org)

developed in partnership with communities, developers, and governments, such as the City of Vancouver.<sup>24</sup>

A broad overview of the types and attributes of CBAs is outlined for South Bruce to consider if negotiations begin with NWMO.

### Formats of CBAs

A CBA is a legally binding and enforceable contract that sets forth specific community benefits for a project: if the agreement's terms are not met, legal recourse can be made. A Community Benefits Framework (CBF) is usually just a set of guidelines.<sup>25</sup> There are three main formats of CBAs:<sup>26</sup>

- Private CBAs are legal agreements between developers and community groups.
- Public CBAs include requirements in public Requests for Proposals.
- Hybrid CBAs are multi-party agreements with developers, governments, and community groups.

### Community Benefits Agreement

- A Community Benefits Agreement (CBA) is a legally binding and enforceable contract: if the agreement's terms are not met, legal recourse can be made.

### Community Benefits Framework

- A Community Benefits Framework (CBF) is usually just a set of guidelines.

### Types of Benefits

There are three broad classifications of benefits, according to a review of reports prepared for by the European Commission<sup>27</sup> (2009) on the International Association for Environmentally Safe Disposal of Radioactive Materials<sup>28</sup> (2010):

- Cash Incentives.
- Social Benefit Measures.
- Community Empowerment Measures.

The following section provides a brief overview of these measures and relative advantages. The European Commission report provides a detailed Strengths, Weaknesses, Opportunities, and Threats analysis of each benefits type.

<sup>24</sup> City of Vancouver Community Benefit Agreement Policy, [vancouver.ca](http://vancouver.ca)

<sup>25</sup> The Canadian Council for Public-Private Partnerships, January 2021, [pppcouncil.ca](http://pppcouncil.ca)

<sup>26</sup> Ibid.

<sup>27</sup> European Commission, Economic Aspects of Regional Repositories, [erdo-wg.com](http://erdo-wg.com)

<sup>28</sup> EDRAM, International Benchmarking of Community Benefits Related to Facilities for Radioactive Waste Management, [edram.info](http://edram.info)

## Cash Incentives

- **Lump Sum** – Often made in instalments, to host or prospective host communities. In some cases, the non-selected community also receives a lump sum payment for their participation in the process. For example, Samsung and Pattern Development, who developed and built the North Kent Wind facility, are contributing \$4 million to the Municipality of Chatham-Kent as a community benefit, to be used at the Council's discretion.
- **Annual Payments** – Made to host or prospective host communities, depending on the volume of waste or stage of the negotiation process.
- **Expert Support** – Funds which allow prospective host community to conduct an independent analysis of components of the Project.
- **Tax Revenue** – In some cases, taxes are payable to either the host community or respective province/state/federal agency that then hold and distribute the funds, normally for economic or social development projects.
- **Trust Fund for Future Generations** – Due to the long-life span of nuclear waste storage projects, some communities prefer funds to be set aside in trust, and accessible for future remediation or community improvement projects.
- **Profit Sharing** – Some communities prefer to receive a percentage of profits, normally in the form of a levy. In the case of the Chatham-Kent wind facility, the municipality and Bkejwanong First Nation each hold a 15% equity interest.

## Social Benefits

- **Employment** – Either direct or indirect workers to a community. In many cases, new workers from outside the region will be attracted. Schemes can be focused on the long-term retention of workers in local industry and housing of workers in or near the community.
- **Infrastructure Improvements** – Nuclear waste development projects have significant infrastructure implications. Many communities negotiate funds for the maintenance of existing infrastructure (e.g., roads, bridges etc.) and funds for the construction of new projects that benefit their community.
- **Property Value Protection** – In some cases communities argue for the value of properties to be protected in case prices slump. However, research suggests that this is a rare occurrence for nuclear waste projects, with higher-income families generally attracted to the area due to jobs or community improvement initiatives. NWMO has announced its Property Value Protection program, which is explored in the Municipality of South Bruce Agriculture Business Impacts Study.
- **Integrated Development Projects** – The design of specific economic or social development projects to support community development over the life of the project is commonplace. This can include research facilities, investments in support or servicing industries, tourism or agriculture grants, and cultural

improvements. Investments do not have to be monetary, and can include time, human resources, or the provision on tools or spaces.

- **Relocation of Developer** – In some cases, the Project developer relocates their main office or headquarters to the host community, showing support in the safety of the Project and supporting the creation and attraction of new jobs to the region.
- **Discounts and Services** – In some cases, communities argue that for hosting nuclear waste they should be compensated for discounted utility bills, etc. Regular monitoring of health and environmental impacts of the site are also normally included in the compensation package.

### Community Empowerment Measures

- **Local Involvement in Decision Making** – Receive financial support for community groups to be part of the decision-making process and conduct outreach efforts.
- **Capacity Building** – Funding to increase community knowledge about the Project so that citizens can be more informed when deciding if their community is the right for the Project.
- **Local Partnership to Oversee a Project** – It is common for a repository sitting process to occur, with a contractual agreement between the host community, national government, and implementor.
- **Involvement Support Packages** - These are essential to gaining reasoned local involvement. Community participation must not be impeded by lack of capabilities or funds. Careful design of these packages must ensure that other communities beyond the immediate area can become involved if they wish, including those along transport corridors.

### Learning from Other Communities

A review of literature uncovers a variety of learning opportunities from CBAs negotiated in other communities. Some critical success factors, according to a Cardus report,<sup>29</sup> include:

- Flexibility in how developers achieve the community's desired benefits.
- Thoughtful and inclusive community engagement.
- Predictability in the procurement process, including fair and transparent bidding criteria and processes.
- Adoption of best or effective practices in procurement by types of industry and business offers, effective tools, and means for conflict resolution.
- Commitment to firm and reasonable targets and the willingness to enforce them.

---

<sup>29</sup> Cardus, Community Benefits Agreements: Toward a Fair, Open, and Inclusive Framework for Canada, July 2021, [cardus.ca](https://www.cardus.ca)

- Development of linkages to labour-market pathways and workforce capacity-building that include post-Project opportunities.
- Establishment of clear and measurable targets for monitoring and evaluation.

### Governance and Oversight

In the report titled P3s and Community Benefits Agreements in Canada,<sup>30</sup> the authors conclude that implementing CBAs successfully requires several conditions to be met. For both the public and private sectors common requirements include:

- Clear and measurable targets.
- Defined outcomes, roles, and responsibilities.
- Implementation guidelines and tactics.
- Monitoring and enforcement of obligations.
- Transparent and regular reporting.
- Active community engagement.

According to a report by the Mowat Centre of the Atkinson Foundation,<sup>31</sup> early CBA experiences suggest five major factors affecting their success:

- Building credible and authentic coalitions.
- Achieving consensus on a negotiating platform.
- Balancing competing demands on developers.
- Setting targets.
- Measuring success and compliance.

It is important to determine which organization(s) is/are involved in the following important activities:

- Who is negotiating and executing the CBA between the community and the developer?
- Who will have the responsibility for the oversight, monitoring, reporting, and enforcement of the CBA, whether the deliverable is the role of the community or the developer?

For the construction of the Gordie Howe International Bridge, the “Local Community Group”<sup>32</sup> was established to “provide formal linkages into the region and work directly with the Windsor-Detroit Bridge Authority and Bridging North America as informal partners in the implementation of collaborative activities related to the Community Benefits Plan for project.”

---

<sup>30</sup> Canadian Council for Public-Private Partnerships, January 2021, [pppcouncil.ca](http://pppcouncil.ca)

<sup>31</sup> The Prosperous Province: Strategies for Building Community Wealth, [communitybenefitsagreements.ca](http://communitybenefitsagreements.ca)

<sup>32</sup> Gordie Howe International Bridge, Local Community Group Terms of Reference, [gordiehoweinternationalbridge.com](http://gordiehoweinternationalbridge.com)

Other Canadian communities are exploring CBAs, including the Regional Municipality of Wood Buffalo<sup>33</sup> and the Hamilton Community Benefits Network,<sup>34</sup> which includes many members, project partners, and funding partners.

## Negotiation

In some cases, CBAs are executed between the developer and a community group, not necessarily the municipality.<sup>35</sup> While in negotiations, it is important for community leaders to be versatile enough to back each other up, especially since the developer will be resistant to some requests. Because there may be so many issues involved in the negotiations, community members need to educate each other on their various priorities. Training on issues can help, and openness and communication are an obvious imperative. While the negotiating team needs to be small, individuals with special expertise can sit in on negotiations as advisors or observers and can advise and educate team members on technical issues.

There are lessons to be learned within the extensive experience Indigenous communities have gained in the development of Impact and Benefits Agreements, according to a report by Canada's Library of Parliament.<sup>36</sup>

In 2004, report<sup>37</sup> students from the Richard Ivey School of Business were commissioned to consult in a study for the Municipality of Kincardine regarding negotiations on a radioactive waste disposal facility. While the study has been mischaracterized by opponents of the facility as a report about stigma, the students actually focussed their attention on discussing negotiation tactics. Among its recommendations were the following:

- Decrease the level of competitive negotiation tactics, employing more collaborative negotiating strategies.
- Clearly define development and growth goals [the municipality] wants to implement, including a timeline for each item.

## Negotiation

There are many issues involved in the negotiations, and the developer will be resistant to some requests.

Community members need to educate each other on their priorities ... training on issues can help, and openness and communication are an obvious imperative.

## When stigma wanes

The largest stigma will be upfront with the first unit of waste, after which stigma decreases significantly. Incentive systems need to exist to ensure compliance with the goals of each stakeholder.

<sup>33</sup> Regional Municipality of Wood Buffalo Social Procurement Engagement, [rmwb.ca](http://rmwb.ca)

<sup>34</sup> Hamilton Community Benefits Network, [hcbn.ca](http://hcbn.ca)

<sup>35</sup> Good Jobs First, Community Benefits Agreements: Making Development Projects Accountable, [goodjobsfirst.org](http://goodjobsfirst.org)

<sup>36</sup> Supporting Aboriginal Participation in Resource Development: The Role of Impact and Benefit Agreements, 2015, [parl.ca](http://parl.ca)

<sup>37</sup> Analysis and Recommendations regarding Intermediate Level Waste I Low Level Waste Management Facilities, Richard Ivey School of Business Client Field Project Team 54, 2004

- Increase the level of urgency [the Project proponent] sees in completing a deal.
- Include [senior level government] agencies in the negotiations.
- Increase the value proposition [the Project proponent] and [senior levels of government] perceives in using [the municipality] as a hosting community.
- Expand on the number of options to increase the value of a deal.

The study also warns about over-playing concerns about stigma, given that “the largest stigma will be upfront with the first unit of waste, after which the marginal stigma decreases significantly. Once the wastes are disposed of in [the municipality], incentive systems need to exist to ensure compliance with the goals of each stakeholder.”

The study also notes “the importance for legal and political lobbying strategy is high in the context of this deal.”

### Environmental Concerns

Concern about environmental impacts is sometimes the driving force that leads a community to press for a CBA. In the case of the CBA for the Los Angeles Airport (LAX) CBA, the following benefits were included:

- Retrofitting diesel construction vehicles and ground service equipment.
- Converting trucks, shuttles, passenger vans, and buses serving the airport to alternative fuels or less-polluting vehicles.
- Electrifying airplane gates, hangars, and cargo operations areas.
- Funds for a comprehensive air quality study, and a health study.
- Funds for community-based studies on health impacts of airport operation.
- Funding for soundproofing nearby schools and residences.
- Designated routes for construction traffic.

### Support for Small Business

Communities can use the CBA process to require efforts to target business and procurement opportunities to local enterprises. This can include requirements that businesses awarding contracts must:

- Notify local contracting organizations of contracting opportunities, e.g., outreach events addressing matchmaking to prime contractors and other capacity building programs, including partnering with chambers of commerce, business groups, small business development centres, and other disadvantaged advocacy groups.

#### Helping small business

- Notifications and outreach.
- Partner with business groups.
- Training on bid preparation.
- Break large contracts into smaller ones.
- Meet percentage goals for local awards.

- Assist local businesses in bid preparation, e.g., conducting training on financial literacy (bonding, loans, lines of credit, insurance, etc.).
- Break large contracts down into smaller contracts.
- Make good faith efforts to award contracts to local businesses.
- Attempt to meet percentage goals for local business awards.

In the case of the Community Benefits Framework negotiated between the Metrolinx and the Toronto Community Benefits Network, close to 200 people have been hired from local communities in construction and Professional-Administrative-Technical (PAT) jobs, and more than \$6 million spent on purchasing from local small- and medium-sized businesses.

A study<sup>38</sup> of public organizations in Scotland using “community benefits clauses” between 2009 and 2014, found that 59% had a designated “champion” responsible for community benefits, including impacts on small- and medium-sized enterprises (SMEs):

- One contract targeted 90% of projects to be sub-contracted, of a total value of projects being £950 million (CDN\$1.5 billion). The actual target achieved was 94%. This contract awarded £348,000 (CDN\$555,000) of works to local SMEs (equivalent to 3.5% of the total contract value).
- One contract with a best-endendeavours<sup>39</sup> clause awarded £63 million (CDN\$100 million) of sub-contracts to suppliers within a 30-mile radius. This is equivalent to 64% of the total contract value.
- Another contract with a best-endendeavours clause awarded 63% of their work packages to Scottish businesses. They also awarded four contracts to social enterprises.

### Designated Champions

A study of organizations using “community benefits clauses” found that 59% had a designated champion responsible for community benefits, including impacts on businesses.

The Municipality of South Bruce Local Hiring Effects Study and Strategy anticipates the importance of support for small business in its second goal, “Enable an Environment for Business Growth.” Several important objectives must be realized to implement the desired outcomes of a CBA with small-business expectations:

- Continually engage with businesses to address labour force needs.
- Encourage entrepreneurship and innovation in the Municipality.
- Focus efforts on business attraction and development.

<sup>38</sup> University of Glasgow, Sutherland et al, Analysis of Impact and Value of Community Benefit Clauses in Procurement, [gov.scot](http://gov.scot).

<sup>39</sup> ‘Best endeavours’ relates to voluntary agreements signed between the procuring organization and the contractor. While not contractually binding, the agreement symbolizes both sides’ commitment to tackling a social issue.

## Targeted Hiring

The most common complaint from community groups involved in CBAs with targeted hiring programs is a lack of enforcement. Many localities have “first source” or local hiring programs that lack any monitoring or enforcement provisions whatsoever. An employer who agrees to comply with a targeted hiring program—in exchange for participating in the project—must also agree to some mechanism for determining whether the program is being followed. Central to any monitoring system is a reporting requirement. Employers should be required to file periodic reports on the percentages of their hires that are targeted individuals and should be required to describe any difficulties they have had in complying with the program.

Even with effective reporting and monitoring, the key success factor of a first source program is typically the speed at which the “first source office” and training organizations can provide qualified applicants. If they fail to provide a reliable, “just-in-time” supply of job candidates, this will be noted as an impediment, and will discount the entire targeted hiring program. The Local Hiring Effects Study and Strategy highlights this concern as Goal I: “Create a Strong Local Talent Pipeline.” Key objectives in the strategy include strengthening the skills training and development ecosystem and providing support for job quality and a favourable work environment for all.

### First Source hiring

The key success factor of a first source hiring program is the speed at which the “first source office” and training organizations can provide qualified applicants.

If they fail to provide a reliable supply of workers, this will be noted as an impediment, and will discount the entire targeted hiring program.

Other challenges include targeted hiring programs that conflict with collective bargaining agreements. If community groups want to apply targeted hiring requirements to unionized labour, they should work with representatives of the labour unions to design policies that further the goals of targeted hiring, while also fitting with the complex systems governing hiring in the collective bargaining environment. In its review of opportunities, the Local Hiring Effects Study and Strategy highlighted the benefits of utilizing local union hiring halls to engage skilled trades on a contract basis. The Casino Woodbine CBA lists “labour peace” as a requirement, and monitoring indicates that there have been no reports of failing to respect the role of unions or complying with contractual or statutory obligations.<sup>40</sup>

The Municipality of South Bruce’s Economic Development Study on Youth noted several key sectors that need to be focused on to attract youth to employment in the area. They include positions in the trades, engineering, agriculture, and other

---

<sup>40</sup> Casino Woodbine CBA, [toronto.ca](http://toronto.ca)

sectors. The study also focuses on supporting youth entrepreneurship and innovation, as well as quality of life, and equity, diversity, and inclusion.

The Scottish study<sup>41</sup> of public organizations in Scotland also reviewed the impacts of targeted hiring practices in community benefits agreements. Based on 24 contracts analyzed:

- More than 1,000 people from priority groups recruited because of the contracts, 38% of whom would not otherwise have been recruited.
- Over 200 apprentices from targeted groups recruited, 73% as a direct result of the contracts.
- 650 people from priority groups accessed work placement, 72% as a direct result of the contracts.
- Over 6,700 people from priority groups received training.
- Targets exceeded: job opportunities, apprenticeships, work placements, and training for priority groups.

### Community and Social Amenities

CBA's can require developers to provide financial support for community and social amenities. In the Casino Woodbine CBA, there was a requirement to \$5 million to create a childcare centre that will benefit Casino Woodbine employees and local residents.<sup>42</sup>

### Clear Understanding

In some communities, local stakeholders may misinterpret key terms and definitions in the CBA. In various examples, some thought the CBA reserved certain decisions to the community, when in fact the agreement offered either shared consensus between the community and the developer or a final decision reserved for the developer. Since the relationship between the community and the developer had been good, these points did not develop into major problems. However, this issue emphasized the importance of a close review of a CBA, both prior to signing and during implementation. CBA's are complex documents. Input on the front end from many community members will reduce misunderstandings and disappointments down the road. For example, in Los Angeles, residents wanted places of worship to be included in the soundproofing funding commitments of the CBA. A progress update<sup>43</sup> in 2019 noted "Places of Worship are not included in the Noise Compatibility Program and are therefore not currently eligible for funding".

### Avoid Disappointment

CBA's are complex documents. Input on the front end from many community members will reduce misunderstandings and disappointments down the road.

<sup>41</sup> University of Glasgow, Sutherland et al, Analysis of the Impact and Value of Community Benefit Clauses in Procurement, [gov.scot](http://gov.scot)

<sup>42</sup> City of Toronto, Community Benefits Agreement: Rexdale-Casino Woodbine, [toronto.ca](http://toronto.ca)

<sup>43</sup> LAX CBA 2019 Annual Report, [lawa.org](http://lawa.org)

## Timelines

Every benefit described in a CBA should have a clearly defined timeframe. Many community benefits are front-end commitments that are intended to be fulfilled as soon as the development is going forward. Other benefits can be provided only after the project is built, such as living wages and local hiring. While these benefits generally don't need a particular start date, developers may want these benefits to expire at a certain time—perhaps five or ten years from the opening of the development. If community groups agree to such a time limit, it should be clearly described in the CBA. The CBA itself should have a definitive end date as well.

### Contractors must agree

The CBA must set up a system so each contractor and sub-contractor agrees to the requirements that apply to them and who can enforce the requirements. The CBA needs to provide strict penalties for contractors that fail to do this.

## Monitoring

Financial commitments and other one-time benefits are probably the easiest aspects of a CBA to monitor. Much more challenging are ongoing commitments such as living wage and local hiring requirements. The most effective approaches include proactive reporting requirements as well as the ability to investigate complaints of noncompliance. Required reports should be no less frequent than once a year, should be publicly available, and should be due by a specific date each year. Reports need to be verifiable, and complaints need to be investigated.

### Monitoring Reports

- Reports should be no less frequent than once a year.
- Reports should be publicly available.
- Reports should be due by a particular date each year.
- Reports need to be verifiable.
- Complaints need to be investigated.

## Enforcement

Inclusion of a CBA in the potential front-ending agreement<sup>44</sup> between the Municipality and the NWMO would greatly assist in the enforcement of the CBA. The legal team drafting a CBA will need to pay particular attention to language in the CBA that will bind parties other than the developer: developer's contractors and tenants, various sub-contractors, entities to whom the developer sells land, and so forth. Making sure that legal requirements bind these entities can be complex, as there may be a lengthy chain of contracts

<sup>44</sup> Ontario Development Charges Act, Front-ending Agreement: "A municipality in which a development charge by-law is in force may enter into an agreement, called a front-ending agreement, that, (a) applies with respect to work, done before or after the agreement is entered into, (i) that relates to the provision of services for which there will be an increased need as a result of development, and (ii) that will benefit an area of the municipality, defined in the agreement, to which the development charge by-law applies; (b) provides for the costs of the work to be borne by one or more of the parties to the agreement; and (c) provides for persons who, in the future, develop land within the area defined in the agreement to pay an amount to reimburse some part of the costs of the work. 1997, c. 27, s. 44 (1)." Source: [ontario.ca](http://ontario.ca)

involved. The CBA needs to set up a system whereby each business is informed of and agrees to the substantive requirements that apply to it, and agrees that community groups, the local government, or affected individuals can enforce the requirements. The CBA needs to provide strict penalties for businesses that fail to do this. Any break in the contractual chain will make CBA requirements unenforceable against some businesses working in the development.

### International Case Studies: Major Projects and CBAs

There is currently no international standard related to the types of benefits that communities can expect to receive when exploring the potential for hosting a facility such as the NWMO Project. Examples of major projects from around the world, along with any information on CBAs, are outlined in Appendix D, Case Studies of Community Benefits Agreements.

## 8. Enabling Economic Development

This section describes the typical nature of successful local economic development initiatives, and how success is enabled. The section also reflects on how the 2021 Economic Development Strategy of South Bruce can be empowered by the NWMO Project, by leveraging partnerships with neighbouring municipalities, senior levels of government, other associations, entities, and groups, and the NWMO.

### In a Nutshell

Local economic development depends on flexible land use policies, investment readiness, business support initiatives, investment attraction tactics, as well as committed local leadership and resources with a long view. Successful economic development also requires regional collaboration, communications, and political advocacy. The formation of economic development collaboratives at a regional level requires ongoing monitoring of the relevance and sustainability of the effort. The 2021 Economic Development Strategy should be adapted in several ways. The Municipality of South Bruce must take responsibility for its own efforts to activate resources and to increase flexibility of land-use policies. The Municipality should take an aggressive, proactive stand on the vision for agriculture's future, helping the region to lead the way in agricultural innovation. South Bruce will need to remain steadfast, working to leverage the possibilities that exist on the balance of lands of the DGR, and the Centre of Expertise. South Bruce must also take responsibility for village revitalization and the diversity of businesses and local culture. The Municipality should develop collaborations with others and lean on NWMO, the potential Collaborative, and senior levels of government to accelerate infrastructure investments, and to ensure the towns in South Bruce are ready to receive new residential, commercial, industrial, and agricultural development.

### Introduction

Successful local economic development strategies depend upon a robust foundation of flexible land-use policies and protocols, proactive investment readiness, business retention, and expansion initiatives, and investment attraction programs which are financially supported by a local leadership team that is committed over the long term.

### Regional Collaboration

However, economic development success does not flourish in a parochial vacuum. It depends upon regional collaboration, communications, and advocacy. This is especially true in the case of a large-scale, regional project, such as the opportunity

presented in this case. Formalizing such collaboration is likely a wise direction, as recommended in the Regional Economic Development Study Draft.

The report promotes the establishment of a Core Study Area Economic Development Collaborative, made up of the following members:

- Municipality of South Bruce.
- Municipality of Brockton.
- Municipality of Huron-Kinloss.
- Municipality of North Huron.
- Municipality of Morris-Turnberry.
- Saugeen Ojibway Nation.
- NWMO.

While it may be advantageous to develop a lead agency that is focused on maximizing the local economic impact on the communities surrounding the Project, the key players should ensure that other organizations are at the table to guarantee the effort is sustainable and relevant.

There may also be merit in the potential Collaborative (as well as individual municipalities) becoming members of organizations such as the Canadian Association of Nuclear Host Communities (CANHC),<sup>45</sup> the Canadian Nuclear Association (CNA),<sup>46</sup> The Centre for Canadian Nuclear Sustainability (CCNS),<sup>47</sup> and the Organization for Canadian Nuclear Industries (OCNI).<sup>48</sup> These organizations may provide direct, unfiltered information on best practices and opportunities related to the Project. There may be international associations, as well, which can add value.

Bruce County and Huron County, at a minimum, should participate in the potential Collaborative to provide a variety of supports to their respective member municipalities. Regional organizations and associations – as well as relevant labour organizations – should also be engaged to maximize communication opportunities. Neighbouring counties, especially Dufferin, Perth, and Wellington, should also be involved, as should post-secondary educational institutions in neighbouring cities.

The Saugeen Ojibway Nation should engage its neighbouring peers, as well as provincial and national Indigenous associations and organizations and the Indigenous Advisory Council of CCNS and other entities.

The NWMO must leverage its international peers and organizations to ensure that the full potential of the Project is realized. The NWMO must demonstrate a track record of providing enthusiastic support and generous willingness to explore opportunities and spin-off benefits for businesses and communities. Without that

---

<sup>45</sup> CANHC, [canhc.ca](http://canhc.ca)

<sup>46</sup> CNA, [cna.ca](http://cna.ca)

<sup>47</sup> CCNS, [theccns.com](http://theccns.com)

<sup>48</sup> OCNI, [ocni.ca](http://ocni.ca)

commitment from NWMO, the likelihood of success will be diminished. The MOU signed with the Municipality is a positive step forward.

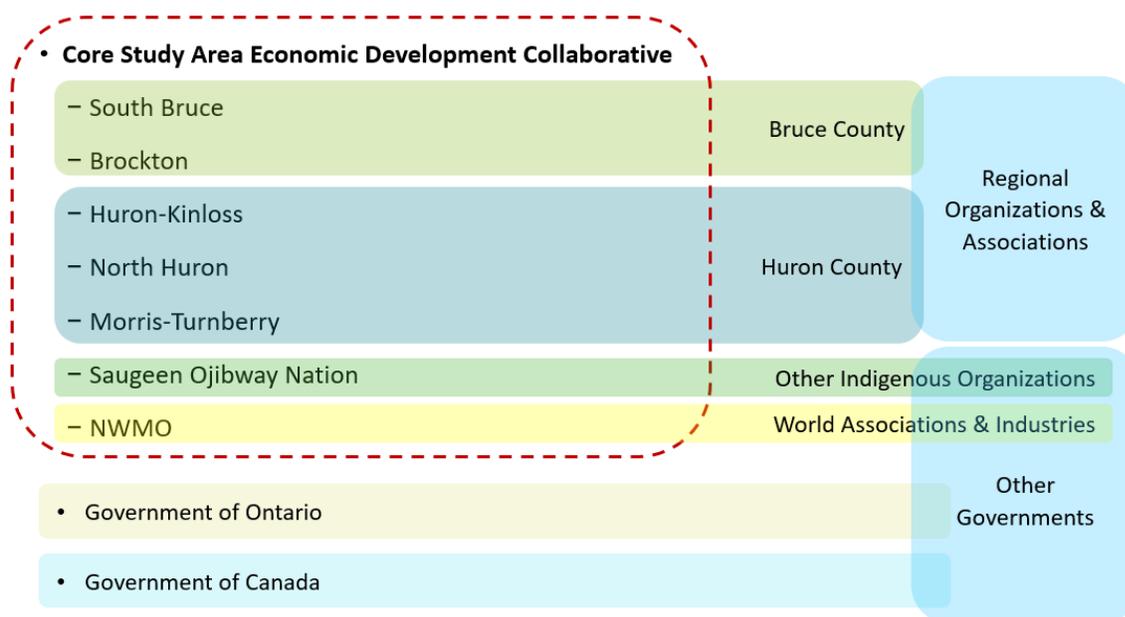
The governments of Ontario and Canada must also be involved in the Project, not only to provide support to local and regional municipal governments, and First Nations, but also to ensure that the NWMO remains

### NWMO's responsibilities

The NWMO must demonstrate a track record of providing enthusiastic support and generous willingness to explore opportunities and spin-off benefits for businesses and communities.

committed community wellbeing and economic viability over the long. See Figure 6, which outlines the partners beyond the envisioned Core Study Area Economic Development Collaborative.

Figure 6: Enablers of Success for the Project



## Reflections on the South Bruce Economic Development Strategy

The 2021 Municipality of South Bruce Economic Development Strategy Update<sup>49</sup> provides a platform upon which the Municipality can undertake meaningful economic development initiatives in the absence of the NWMO Project.

The report had three core strategic objectives:

1. Foundations & Follow-Through.
2. Agri-Business Reboot.
3. Village Revival.

<sup>49</sup> See Appendix E, Local Economic Development Strategy 2021 Summary.

## Foundations & Follow-Through

The “Foundations & Follow-Through” strategic objective focused on the capital and operational resources needed to implement a go-forward plan. Developing servicing capacity and hard infrastructure is essential, and nurturing partnerships with others is critical. Regular updates of policies, protocols, and tactics must be top-of-mind. Municipal staff must be hired to focus on economic development initiatives and not be distracted by overloaded work plans with non-related projects. The priorities for Foundations & Follow-Through in the 2021 Strategy were:

- Activate human resources and collaboration.
- Increase flexibility and relevance of policies and tactics.
- Accelerate infrastructure investments.

Reflecting on the opportunity presented by NWMO, the Municipality of South Bruce must take responsibility for its own efforts to activate human resources and collaboration, and to increase flexibility and relevance of policies and tactics. The Municipality should, however, develop collaborations with others and lean on NWMO, the potential Collaborative, and senior levels of government to accelerate infrastructure investments.

### Resources and Flexibility

The Municipality of South Bruce must take responsibility for efforts to activate human resources and collaboration, and to increase flexibility and relevance of policies and tactics.

## Agri-Business Reboot

The “Agri-Business Reboot” strategic objective in the 2021 Municipal Economic Development Strategy Update acknowledged that agriculture is a traditional industry undergoing powerful transformations not unique to South Bruce. Agriculture and agribusiness are deeply affected by global market forces, changing farm operation models, climate change, and shifting consumer tastes. The use of technology and equipment has allowed farms to be more efficient, with increased precision and automation. South Bruce's strength in agriculture can aid in the development of value-added agri-businesses. All levels of government are often faulted for ignoring or misunderstanding agriculture. Coupled with

fractured advocacy and messaging, farmers struggle to be heard or helped. Without cohesion and clarity, farms and agri-businesses at a local level are frustrated with policies and decisions that run counter to their aspirations. The 2021 Municipal Economic Development Strategy Update suggested that the Municipality of South Bruce may benefit from taking active steps to support advances in value-added processing in agriculture, including food and beverage manufacturing, meatpacking, cheese production, agritech, wholesale trade, transportation, and warehousing.

### Agribusiness Opportunities

South Bruce must amplify its ability to enable investments in agriculture and agribusiness, by collaborating with NWMO and others.

Assisting these locally present agriculture subsectors and stakeholders is where local government can have the most influence. Executed properly, trust may be earned among the farming community and the agri-business sector, who may then accept invitations to collaborate.

The priorities for Agri-Business Reboot in the 2021 Strategy were:

- Lead the way in agricultural innovation.
- Enable investments in value-added, agritech, and culinary.

Reflecting on the opportunity presented by NWMO, the Municipality of South Bruce has the unique opportunity to enable investments in agriculture and agribusiness by working in collaboration with NWMO, the potential Collaborative, and senior levels of government. By taking an aggressive, proactive stand on the vision for their agriculture's future, the region could lead the way in agricultural innovation. South Bruce will need to remain steadfast on this strategic objective, and work to leverage the possibilities that exist on the balance of lands of the DGR, and the Centre of Expertise.

### Village Revival

The "Village Revival" strategic objective acknowledged that the villages of Teeswater, Mildmay, and Formosa have the potential to be the centres of culture, business, and community in South Bruce. These settlement areas are barometers of the area's vitality and health. They set the tone for tolerance of new ideas, inclusiveness, change, and progress. Revival of communities is an ongoing effort, not a one-off scenario. By taking a lead role in reinventing the villages, the Municipality of South Bruce can build out the area's economic and social capacity to accept new residents, businesses, and amenities.

#### Village Revitalization

The Municipality of South Bruce must take responsibility for efforts to support village revitalization and embrace diversity in business and culture.

The priorities for Village Revival in the 2021 Strategy were:

- Ensure villages are shovel-ready for development.
- Double-down on support for village revitalization.
- Embrace diversity in business and culture.

Reflecting on the opportunity presented by NWMO, the Municipality of South Bruce must take responsibility for its own efforts to support village revitalization and embrace diversity in business and culture. The Municipality should, however, develop collaborations with others and lean on NWMO, the potential Collaborative, and senior levels of government to ensure the settlement areas are ready to receive new residential, commercial, industrial, and agricultural development.

## Implementation

The Municipality of South Bruce has recorded several efforts to implement the 2021 Economic Development Strategy Update. They include:<sup>50</sup>

- Updating the Community Improvement Plan (CIP).
- Implementing Wayfinding Signs.
- Installing Banners.
- Participating in the Digital Main Street program.
- Approving South Bruce Façade Improvement Grants.
- Participating in Bruce County “Spruce the Bruce” Grants.
- Implementing the South Bruce Personal Protection Equipment Grant.
- Providing discounted training to businesses.
- Updating the Corporate Strategic Plan.
- Expanding broadband internet in Teeswater and Formosa.
- Implementing the South Bruce Shopping Blitz Passport campaign.
- Ongoing support for the South Bruce Vintage Tractor Tour (22 years) and new support for the Flavours of South Bruce event.

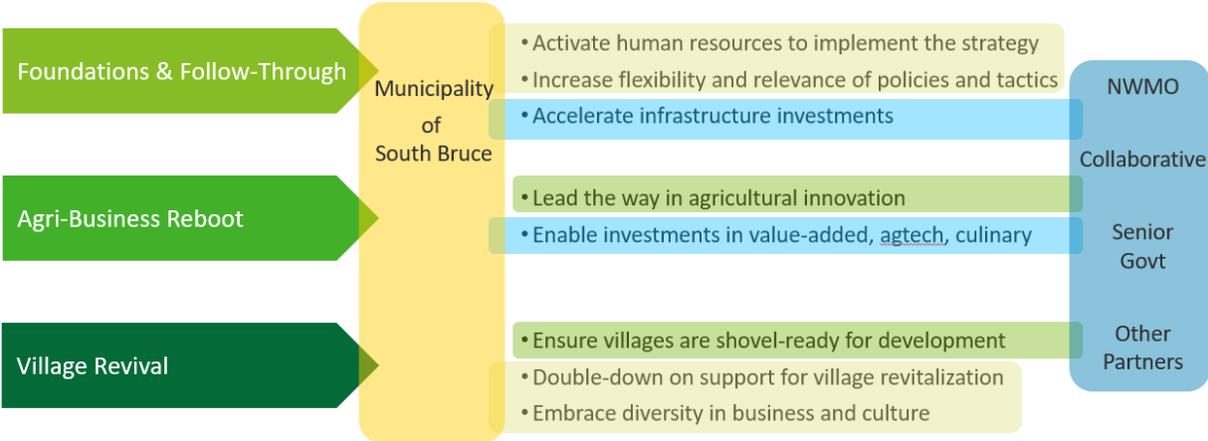
## Collaborations to support economic development

Figure 7 outlines how each strategic objective and priority within the 2021 Economic Development Strategy Update can be accelerated with the assistance of collaborations, be they with NWMO, the potential Collaborative, or senior levels of government, and others.

---

<sup>50</sup> Source: Municipality of South Bruce

Figure 7: Collaborations to support the economic development of South Bruce



## 9. Recommendations

The following local economic development recommendations are provided for the Municipality of South Bruce's consideration if the NWMO Project goes forward to be located in the community.

1. **Maximize the full positive potential of the NWMO Project**, by negotiating a Hosting Agreement with detailed, tangible community benefits, targets, and initiatives; specific performance measures; regular monitoring and public reporting; and effective enforcement tools.
2. **Expedite local economic development outcomes**, by activating appropriate levels of human and financial resources in the Municipality's Economic Development function and advocating for increased flexibility and relevance of development-related policies and programs in Bruce County's Planning function.
3. **Accelerate regional collaboration**, by leveraging relationships and developing partnerships with others, including NWMO, neighbouring communities and Counties, senior levels of government, First Nations, and other organizations, associations, and entities.
4. **Support village revitalization and embrace diversity in business and culture** in meaningful ways, by ensuring the community is shovel-ready to receive new residential, commercial, industrial, and agricultural development, through the maintenance and expansion of public infrastructure (water, sewer, utilities, broadband internet).
5. **Provide relevant data to businesses with potential to enter the NWMO supply chain**, to make informed decisions related to capacity expansions, financial and legal considerations, capital investments, technology and process improvements, workforce enhancements, regulatory requirements, and other opportunities and challenges.
6. **Promote the community as an investment destination** to attract new employers, jobs, investments, and residents to the area.
7. **Expand the economic impact of the local tourism industry**, by maximizing the effectiveness, viability, and attractiveness of the facilities, operations, programs and of the Centre of Expertise, positioning it as a premier international visitor destination.

8. **Aspire to be a leader in agricultural innovation**, by advocating for commitments from NWMO and others to build agricultural innovation opportunities on the balance of lands of the DGR and within the Centre of Expertise, with an aim to amplify investments in agriculture and agribusiness.
9. **Enforce requirements of a Hosting Agreement** between the Municipality of South Bruce and the NWMO, by communicating progress on the Project, economic spin-off opportunities, and community benefits to businesses and residents.

## Appendix A: Study Charter

The following appendix includes an abridged version of the original “MDB Insight – Municipality of South Bruce – Study Charter: Economic Development Project Effects & Strategy.”

### Introduction

The study charter is a reference document to be used throughout the creation of an Economic Development Project Effects & Strategy for the Municipality of South Bruce. The study charter confirms the study scope and tracks progress towards the achievement of deliverables. The charter indicates:

- Study sequencing and staging of tasks.
- Key decision points.
- The expected completion date of the study deliverables.
- The roles and responsibilities of both the consulting team and client.
- The study charter contents include a brief description of the engagement plan and a detailed work plan and timeline.

### Project Description

Key deliverables of the study will be the development of the Economic Development Project Effects & Strategy to maximize economic development opportunities within the Municipality of South Bruce associated with the Nuclear Waste Management Organization (NWMO) Project. Specific objectives of the study include:

1. Describing the local economy of South Bruce, generally and with a special attention to the energy, nuclear, and construction sectors.
2. Describing the potential business needs of the NWMO respecting the services, equipment, and materials it expects to procure during the construction and operations phases of the Project.
3. Describing the economic and commercial development opportunities in South Bruce associated with the APM Project, by:
  - a. Examining all sectors specifically related to the Project.
  - b. Identifying opportunities for economic cooperation between existing South Bruce businesses and the NWMO that can result in mutual benefits.
4. Identifying strategies to encourage local economic development related to the NWMO APM Project, such as:
  - a. Identifying strategies for existing South Bruce based businesses to become suppliers to the Project.
  - b. Identifying strategies to encourage potential suppliers to the Project to locate their operations in South Bruce.

5. Identifying any constraints to industrial development in South Bruce, such as constraints on the number of industrial lands that are or will become available.

## Other Key Considerations

An essential input for this study is to determine the services, equipment, and materials potentially needed by the Project. This information will also be an essential input to the Regional Economic Development study that will be conducted by the NWMO.

This study will involve the following participants: South Bruce Community and Business Association, Mildmay Chamber of Commerce, Saugeen Economic Development, Bruce Community Futures, and Bruce County Economic Development.

The Local and Regional Economic studies will need to be coordinated to ensure they use common assumptions and do not result in competing strategies for maximizing the economic benefits of the Project.

The Employment Studies will need to be coordinated to ensure the expectations respecting the workforce retained by the NWMO is consistent with the expected procurement of support services. By their nature, support services are expected to be needed on a periodic or short-term basis or needed as they provide skills and capabilities that the NWMO will require solely for a phase of the Project (such as initial construction).

The Aggregate Resources study, Tourism Study, and Youth Economic Development study will also provide content to and integrate with this study.

This study will contribute to the economic baseline and impact assessment studies and will need to be undertaken in a manner that is consistent with the future regulatory approvals process quality requirements, including GBA+<sup>51</sup>.

## Stakeholder Engagement Plan

A strong communications plan is essential in supporting the successful execution of the work plan. The communications plan includes:

- Definition of key messages.
- A list of proposed engagement activities.

## Key Messages

The following key messages will guide our communication updates.

1. The Municipality of South Bruce is undertaking an Economic Development Project Effects & Strategy to identify strategies that have the potential to maximize economic development opportunities within the Municipality of South Bruce associated with the Nuclear Waste Management Organization (NWMO) Project. This study will consult local business organizations, business owners and operators.

---

<sup>51</sup> Recommendation 2 of the [Nuclear Transparency Project letter to Minister Seamus O'Regan, May 31, 2021](#): "Robust gender-based analysis plus (GBA+) frameworks should be required for future policy developments and individual project decisions related to radioactive wastes. While the new Impact Assessment Act requires this in select instances in which the Act applies, future radioactive waste management policy should ensure broader application of environmental justice principles and GBA+."

- Assisting in this process is MDB Insight (acquired by Deloitte LLC), an experienced and respected consulting firm that will be involved throughout the development of research and analysis for the Economic Development Project Effects & Strategy, including all stakeholder engagement aspects of the project.

## Engagement Plan and Reporting Outline

The chart that follows outlines all stakeholder engagement activities anticipated for the study and their respective planning and implementation considerations. Note: Changes to Engagement Activities outlined in the Study Charter will be reflected in the work plan circulated with project updates.

Activity	MDB Insight Responsibilities	Municipality of South Bruce Staff Responsibilities	Target Audience	Rationale /Question(s)	Timing/ Status
Project Launch Meeting	<ul style="list-style-type: none"> <li>Create agenda</li> <li>Draft Charter, Work plan, Comms Strategy</li> <li>Host meeting</li> </ul>	<ul style="list-style-type: none"> <li>Invite attendees</li> <li>Provide feedback</li> </ul>	<ul style="list-style-type: none"> <li>Municipal staff leads</li> </ul>	<ul style="list-style-type: none"> <li>Clarify the objectives of the project</li> <li>Outline information needs</li> <li>Identify barriers to implementing work plan</li> <li>Approve Study Charter</li> </ul>	Completed
Project Updates - ONLINE	<ul style="list-style-type: none"> <li>Host meeting</li> <li>Update Work plan</li> <li>Report on progress</li> <li>Analyze feedback</li> </ul>	<ul style="list-style-type: none"> <li>Provide feedback</li> <li>Provide updates on any project supports</li> </ul>	<ul style="list-style-type: none"> <li>Municipal staff leads</li> </ul>	<ul style="list-style-type: none"> <li>Update Client on progress</li> <li>Ensure Client supports are in place where needed</li> </ul>	Completed
Information Inputs - EMAIL or DROPBOX	<ul style="list-style-type: none"> <li>Detail resource needs required (see Section 6)</li> </ul>	<ul style="list-style-type: none"> <li>Provide background documents, data, information, feedback, direction, as requested</li> <li>Request information from NWMO and others</li> </ul>	<ul style="list-style-type: none"> <li>For MDB Insight review and analysis</li> </ul>	<ul style="list-style-type: none"> <li>Ensure client communicates input for consideration by MDB Insight</li> </ul>	Completed
Workshop— Local Business Organizations					Cancelled. Completed interviews
Local Business Interviews (15) - PHONE	<ul style="list-style-type: none"> <li>Create an interview script</li> <li>Conduct interviews via telephone</li> <li>Analyze results</li> </ul>	<ul style="list-style-type: none"> <li>Approve script</li> <li>Provide list of stakeholders and contact information</li> <li>Provide introduction to target audience</li> </ul>	<ul style="list-style-type: none"> <li>Local businesses with potential to supply NWMO</li> <li>South Bruce Community and Business Association, Mildmay Chamber of Commerce, Saugeen Economic Development and Bruce CFDC, Bruce County Economic Development Services in separate study</li> </ul>	<ul style="list-style-type: none"> <li>Understand capacity to supply NWMO and risks, explore general economic and commercial development opportunities; identify opportunities for cooperation between existing businesses and NWMO; identifying strategies for existing South Bruce businesses to become suppliers, to encourage potential suppliers to Project to locate their operations in South Bruce; constraints to industrial development in South Bruce, such as the number of industrial lands; how can capacity be built locally</li> </ul>	Completed

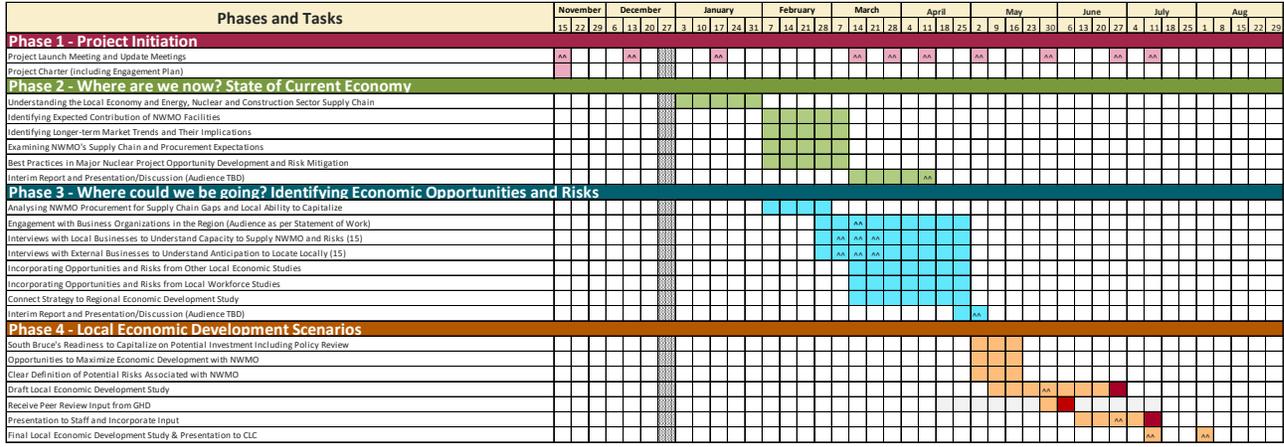
Municipality of South Bruce Economic Development Project Effects & Strategy

Activity	MDB Insight Responsibilities	Municipality of South Bruce Staff Responsibilities	Target Audience	Rationale /Question(s)	Timing/ Status
External Business Interviews (15) - PHONE	<ul style="list-style-type: none"> <li>▪ Create an interview script</li> <li>▪ Conduct interviews via telephone</li> <li>▪ Analyze results</li> </ul>	<ul style="list-style-type: none"> <li>▪ Approve script</li> <li>▪ Provide list of stakeholders and contact information</li> <li>▪ Provide introduction to target audience</li> </ul>	<ul style="list-style-type: none"> <li>▪ Potential businesses with potential to supply NWMO</li> </ul>	<ul style="list-style-type: none"> <li>▪ Identify strategies to encourage potential suppliers to the Project to locate their operations in South Bruce.</li> </ul>	Completed
Presentation – Consultation Summary Report - ONLINE	<ul style="list-style-type: none"> <li>▪ Host meeting</li> <li>▪ Present Report</li> <li>▪ Analyze feedback</li> </ul>	<ul style="list-style-type: none"> <li>▪ Invite participants</li> <li>▪ Provide feedback</li> </ul>	<ul style="list-style-type: none"> <li>▪ Municipal staff leads</li> <li>▪ Others</li> </ul>	<ul style="list-style-type: none"> <li>▪ Present findings to date</li> <li>▪ Discuss local ability to capitalize on supply chain opportunities</li> <li>▪ Discuss next phase: readiness to capitalize, policy review, opportunities, potential risks associated with NWMO</li> </ul>	Completed
Presentation – First Draft Economic Development Study - VIRTUAL	<ul style="list-style-type: none"> <li>▪ Draft Local Economic Development Study</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provide feedback</li> </ul>	<ul style="list-style-type: none"> <li>▪ Municipal staff leads</li> <li>▪ GHD</li> </ul>	<ul style="list-style-type: none"> <li>▪ Incorporate feedback into Final Draft</li> <li>▪ Intake for peer review</li> </ul>	Completed
Peer Review Input from GHD	<ul style="list-style-type: none"> <li>▪ Receive Peer Review Input</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provide Peer Review Input</li> </ul>	<ul style="list-style-type: none"> <li>▪ GHD</li> </ul>	<ul style="list-style-type: none"> <li>▪ Input for final draft</li> </ul>	Completed
Final Submission – Local Economic Development Study	<ul style="list-style-type: none"> <li>▪ Deliver Final Report</li> </ul>	<ul style="list-style-type: none"> <li>▪ Receive final report</li> </ul>	<ul style="list-style-type: none"> <li>▪ Municipal staff leads</li> </ul>	<ul style="list-style-type: none"> <li>▪ Confirm approval of Final Draft</li> </ul>	Completed
Presentation to Community Liaison Committee – Final Local Economic Development Study	<ul style="list-style-type: none"> <li>▪ Develop presentation</li> <li>▪ Conduct presentation</li> </ul>	<ul style="list-style-type: none"> <li>▪ Organize meeting logistics</li> <li>▪ Approve presentation</li> </ul>	<ul style="list-style-type: none"> <li>▪ Community Liaison Committee</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provide feedback to finalize document</li> </ul>	Wed., Aug 4, 2022



## Work Plan and Gantt Chart

The Gantt Chart below represents the original timeline of the Economic Development Project Effects & Strategy. The detailed engagement plan replaces this chart.



AA Remote Conference/Video Meeting  
 Milestone



## Resource Needs

MDB Insight requests the following resources from the Municipality of South Bruce, via email or dropbox:

### Information needed from South Bruce or Bruce County

1. Access to EMSI Analyst Data for two months.
2. List of South Bruce business association contact names, emails, and phone numbers.
3. List of 15 local businesses (names, emails, phone numbers) with potential to capitalize on NWMO supply chain.
4. List of 15 external businesses (names, emails, phone numbers) with potential to relocate for NWMO supply chain opportunities.
5. List and map of designated vacant industrial and commercial lands in South Bruce, with servicing details (water, sewer, power, gas, broadband, etc.).
6. All development-related policies (Official Plan, Zoning By-Law, Community Improvement Plan), by-laws, protocols, etc.

### Information needed from other sources

7. Information about expected financial / employment contribution of NWMO facilities (DGR and Centre of Expertise).
8. Information about NWMO's supply chain and procurement expectations, including land needs for new or expanding suppliers within South Bruce and Bruce County.
9. Examples of municipal policy changes made in other communities to facilitate economic development opportunities associated with the development of a nuclear waste (or similar) facility in a rural community.
10. Studies, reviews, or reports on local economic impact by a Deep Geological Repository, nuclear power plant, or other major industrial intervention from any other jurisdiction in the world.
11. Mitigation (emergency preparedness and business recovery), investment or marketing strategies for local economic development, prepared for communities near Deep Geological Repositories, nuclear power plants, etc.
12. Details of any economic development constraints, or buffer areas that will be created anywhere in South Bruce or Bruce County related to the NWMO Deep Geological Repository.
13. Examples of business operations or community amenities that opened, expanded, downsized, or closed adjacent to a Deep Geological Repository, nuclear power plant, or other major industrial intervention established anywhere else in the world.

## Report Outline

A report outline establishes the structure of the final report for the Municipality of South Bruce Economic Development Project Effects & Strategy. The following table of contents serves as the starting point for the final product. This reporting structure can be discussed based on the Municipality of South Bruce's vision for the documents.

### Draft Table of Contents

1. Executive Summary.
2. Local Economy of South Bruce.
3. NWMO Potential Business Needs.
4. Supply Chain Opportunity Strategies.
5. Constraints to Industrial Development in South Bruce.
6. Economic and Commercial Development Opportunities of the APM Project.
7. Recommendations.

### Appendix or Separate Technical Report

- a. Methodology.
- b. Document Review.
- c. Consultation Summary.
- d. Summary of Reviews and Analysis.
- e. Strengths, Opportunities, Aspirations, Risks, Results Assessment.

## Appendix B: Business Gap Analysis

Figure 8: Business Gap Analysis, 2031 Forecast

NAICS Code	Description	Ontario Business Counts (Dec 2021)	South Bruce Business Counts (Dec 2021)	CSA Business Counts (Dec 2021)	# of People Per Business in Ontario	Theoretical Capacity: South Bruce (2021)	Theoretical Capacity: South Bruce (2031)	South Bruce Base Case (Need in 2031)	South Bruce Impact Case (Need in 2031)	Theoretical Capacity: Core Study Area (2021)	Theoretical Capacity: Core Study Area (2031)	Core Study Area Base Case (Need in 2031)	Core Study Area Impact Case (Need in 2031)
<b>TOP 20 (from Interim Report)</b>													
5312	Offices of real estate agents and brokers	46,964	2	55	0.0033	21	24	-22	-23	110	130	-75	-77
6211	Offices of physicians	33,541	3	34	0.0024	15	17	-14	-15	79	93	-59	-60
7225	Full-service restaurants and limited-service eating places	33,137	6	44	0.0023	15	17	-11	-12	78	92	-48	-49
6213	Offices of other health practitioners	28,796	3	36	0.0020	13	15	-12	-12	67	80	-44	-45
5411	Legal services	18,994	-	14	0.0013	8	10	-10	-10	45	53	-39	-39
5412	Accounting, tax preparation, bookkeeping and payroll services	20,399	1	25	0.0014	9	11	-10	-10	48	57	-32	-32
6212	Offices of dentists	12,138	-	5	0.0009	5	6	-6	-7	28	34	-29	-29
5121	Motion picture and video industries	8,593	-	-	0.0006	4	4	-4	-5	20	24	-24	-24

Municipality of South Bruce Economic Development Project Effects & Strategy

NAICS Code	Description	Ontario Business Counts (Dec 2021)	South Bruce Business Counts (Dec 2021)	CSA Business Counts (Dec 2021)	# of People Per Business in Ontario	Theoretical Capacity: South Bruce (2021)	Theoretical Capacity: South Bruce (2031)	South Bruce Base Case (Need in 2031)	South Bruce Impact Case (Need in 2031)	Theoretical Capacity: Core Study Area (2021)	Theoretical Capacity: Core Study Area (2031)	Core Study Area Base Case (Need in 2031)	Core Study Area Impact Case (Need in 2031)
	<b>TOP 20 (from Interim Report) – continued</b>												
5242	Agencies, brokerages and other insurance related activities	13,257	4	22	0.0009	6	7	-3	-3	31	37	-15	-15
4461	Health and personal care stores	13,461	2	17	0.0009	6	7	-5	-5	32	37	-20	-21
8121	Personal care services	17,261	9	34	0.0012	8	9	0	0	40	48	-14	-14
8129	Other personal services	7,821	3	12	0.0005	3	4	-1	-1	18	22	-10	-10
4539	Other miscellaneous store retailers	8,273	2	16	0.0006	4	4	-2	-2	19	23	-7	-7
7111	Performing arts companies	3,263	1	3	0.0002	1	2	-1	-1	8	9	-6	-6
7223	Special food services	3,607	-	4	0.0003	2	2	-2	-2	8	10	-6	-6
4511	Sporting goods, hobby and musical instrument stores	3,421	-	4	0.0002	2	2	-2	-2	8	9	-5	-6
4431	Electronics and appliance stores	3,069	-	5	0.0002	1	2	-2	-2	7	9	-4	-4
7224	Drinking places (alcoholic beverages)	928	-	1	0.0001	0	0	0	0	2	3	-2	-2
4451	Grocery stores	8,354	3	23	0.0006	4	4	-1	-1	20	23	0	0
4413	Automotive parts, accessories and tire stores	2,552	-	7	0.0002	1	1	-1	-1	6	7	0	0
4422	Home furnishings stores	2,490	-	9	0.0002	1	1	-1	-1	6	7	2	2

Municipality of South Bruce Economic Development Project Effects & Strategy

NAICS Code	Description	Ontario Business Counts (Dec 2021)	South Bruce Business Counts (Dec 2021)	CSA Business Counts (Dec 2021)	# of People Per Business in Ontario	Theoretical Capacity: South Bruce (2021)	Theoretical Capacity: South Bruce (2031)	South Bruce Base Case (Need in 2031)	South Bruce Impact Case (Need in 2031)	Theoretical Capacity: Core Study Area (2021)	Theoretical Capacity: Core Study Area (2031)	Core Study Area Base Case (Need in 2031)	Core Study Area Impact Case (Need in 2031)
	<b>Additional Business Sectors with Gaps</b>												
5311	Lessors of real estate	250,559	79	422	0.0176	110	131	-52	-55	587	695	-273	-280
5415	Computer systems design and related services	51,903	-	12	0.0036	23	27	-27	-28	122	144	-132	-133
5239	Other financial investment activities	58,085	15	104	0.0041	26	30	-15	-16	136	161	-57	-59
4841	General freight trucking	48,002	12	75	0.0034	21	25	-13	-14	112	133	-58	-59
5416	Management, scientific and technical consulting services	49,446	15	64	0.0035	22	26	-11	-11	116	137	-73	-75
5313	Activities related to real estate	18,593	1	16	0.0013	8	10	-9	-9	44	52	-36	-36
4853	Taxi and limousine service	14,791	-	-	0.0010	6	8	-8	-8	35	41	-41	-41
5511	Management of companies and enterprises	14,628	1	21	0.0010	6	8	-7	-7	34	41	-20	-20
5419	Other professional, scientific and technical services	20,419	5	35	0.0014	9	11	-6	-6	48	57	-22	-22
8139	Business, professional, labour and other membership organizations	12,669	1	6	0.0009	6	7	-6	-6	30	35	-29	-29
2361	Residential building construction	38,438	16	94	0.0027	17	20	-4	-5	90	107	-13	-14
6116	Other schools and instruction	9,836	1	11	0.0007	4	5	-4	-4	23	27	-16	-17
5414	Specialized design services	9,279	1	5	0.0007	4	5	-4	-4	22	26	-21	-21

Municipality of South Bruce Economic Development Project Effects & Strategy

NAICS Code	Description	Ontario Business Counts (Dec 2021)	South Bruce Business Counts (Dec 2021)	CSA Business Counts (Dec 2021)	# of People Per Business in Ontario	Theoretical Capacity: South Bruce (2021)	Theoretical Capacity: South Bruce (2031)	South Bruce Base Case (Need in 2031)	South Bruce Impact Case (Need in 2031)	Theoretical Capacity: Core Study Area (2021)	Theoretical Capacity: Core Study Area (2031)	Core Study Area Base Case (Need in 2031)	Core Study Area Impact Case (Need in 2031)
	<b>Additional Business Sectors with Gaps – continued</b>												
7115	Independent artists, writers and performers	7,342	-	2	0.0005	3	4	-4	-4	17	20	-18	-19
5413	Architectural, engineering and related services	16,502	5	27	0.0012	7	9	-4	-4	39	46	-19	-19
5614	Business support services	6,853	-	5	0.0005	3	4	-4	-4	16	19	-14	-14
5611	Office administrative services	6,586	-	5	0.0005	3	3	-3	-4	15	18	-13	-13
5223	Activities related to credit intermediation	5,273	-	4	0.0004	2	3	-3	-3	12	15	-11	-11
2372	Land subdivision	8,913	2	11	0.0006	4	5	-3	-3	21	25	-14	-14
5418	Advertising, public relations, and related services	8,869	2	3	0.0006	4	5	-3	-3	21	25	-22	-22

Source: metroeconomics, Manifold Data Mining, Deloitte analysis

## Appendix C: Detailed Benefits of NWMO Project

Figure 9: Detailed Benefits of NWMO Project

Community Benefit	Supply Chain	Resource Use and Enhancement	Training and Recruiting	Community Initiatives
<p><b>Business opportunities – new products, services, and markets</b></p>	<p><b>Equipment Maintenance</b> – potential for new services and markets for local businesses</p> <p><b>Food Services Company</b> – business opportunity</p> <p><b>Office Building and Grounds Maintenance</b> – procurement opportunities</p> <p><b>Supply Chain Related Investment</b> - provides existing firms with access to new markets</p> <p><b>Used Fuel Container Manufacturing</b> – potential opportunity for local businesses</p>	<p><b>Aggregate Supply</b> - expanded markets</p> <p><b>Agritech Development</b> - provide platform that may attract international interest</p> <p><b>Balance of Site (Agriculture)</b> – new business opportunities, new products, and markets</p> <p><b>Balance of Site (Wilding)</b> – opportunity to showcase environmental products</p> <p><b>Excavated Rock Pile</b> – potential new revenue source, new products, services, and markets (e.g., ingredients for construction materials, paint, and consumer products)</p> <p><b>Food Supply</b> - opportunity for area producers to service other markets and specific consumer entities</p>	<p><b>Apprenticeship Program</b> – programs to encourage local businesses to employ local apprentices</p> <p><b>Food Services Training and Workforce Development</b> - create demand for local food products</p> <p><b>NWMO Staffing</b> – increased local spending</p> <p><b>Training and Conference Facility</b> – create synergies between new Research and Development (R&amp;D) projects and local businesses</p> <p><b>Underground Operations-</b> potential for local businesses to develop and supply new products and services</p>	<p><b>Day Care</b> - develop model that helps support local business needs</p> <p><b>Housing</b> - create business opportunities for the local community</p> <p><b>Project Awareness Building</b> – demonstrates impact of NWMO on local economic development</p>
<p><b>Business resilience and capacity building</b></p>	<p><b>Food Services Company</b> – business opportunity</p> <p><b>Office Building and Grounds Maintenance</b> – may allow local area businesses to up-scale capabilities</p> <p><b>Supply Chain Related Investment</b> – opportunity for businesses to bid on NWMO procurement</p> <p><b>Used Fuel Container Manufacturing</b> - may allow local area businesses to up-scale capabilities</p>	<p><b>Aggregate Supply</b> -build capacity of existing businesses</p> <p><b>Agritech Development</b> - new innovations and applications, be a strong catalyst for Research and Development (R&amp;D)</p> <p><b>Balance of Site (Agriculture)</b> – opportunity to showcase pilot projects</p> <p><b>Balance of Site (Wilding)</b> – opportunity to showcase products and services</p> <p><b>Excavated Rock Pile</b> – build local business capacity to leverage this resource</p> <p><b>Food Supply</b> - area food producers learn market preferences and requirements, provide insight into food safety by being direct suppliers to business clients</p>	<p><b>Apprenticeship Program</b> – utilize to build resilience and capacity</p> <p><b>Food Services Training and Workforce Development</b> – ensure local businesses have the talent they need to respond to future opportunities</p> <p><b>NWMO Staffing</b> – increased spending at local businesses. Contingent on if products and services are available</p> <p><b>Training and Conference Facility</b> – create synergies between new Research and Development (R&amp;D) projects and local businesses</p>	<p><b>Day Care</b> - develop model supports business resilience</p> <p><b>Housing</b> - help meet demand for affordable housing for employees</p> <p><b>Project Awareness Building</b> - positions nuclear as contributor to the economy</p>

Community Benefit	Supply Chain	Resource Use and Enhancement	Training and Recruiting	Community Initiatives
			<b>Underground Operations-</b> develop ability of local businesses to respond to opportunities available	
<b>Business retention and expansion</b>	<p><b>Equipment Maintenance</b> – potential to retain and expand existing equipment maintenance businesses</p> <p><b>Food Services Company</b> – business opportunity</p> <p><b>Office Building and Grounds Maintenance</b> - provides long term customer continuity for area businesses</p> <p><b>Supply Chain Related Investment</b> - potential for partnerships with existing firms</p>	<p><b>Aggregate Supply</b> -retain and expand existing businesses</p> <p><b>Agritech Development</b> – create synergies between Research and Development (R&amp;D) and existing businesses</p> <p><b>Balance of Site (Agriculture)</b> - business expansion opportunities</p> <p><b>Excavated Rock Pile</b> – create synergies between existing businesses</p> <p><b>Food Supply</b> - opportunities for innovation in food production and handling</p>	<p><b>Apprenticeship Program</b> – adapt to assist with business needs</p> <p><b>Food Services Training and Workforce Development</b> – ensure local businesses have the talent they need to respond to current demand</p> <p><b>NWMO Staffing</b> – new employees may support existing businesses</p> <p><b>Underground Operations-</b> develop ability of local businesses to bid on projects to retain or expand their business</p>	<p><b>Day Care</b> - develop a model that could be deployed in other communities; potential to share staff resources through a networking system</p> <p><b>Housing</b> - help meet demand for affordable housing for workers</p> <p><b>Project Awareness Building</b> – showcases NWMO’s contribution to local economic growth</p>
<b>Climate change mitigation</b>	<p><b>Office Building and Grounds Maintenance</b> – opportunity to use green architectural design</p> <p><b>Supply Chain Related Investment</b> – opportunity to find synergies between NWMO and climate change initiatives</p>	<p><b>Agritech Development</b> – create synergies between Research and Development (R&amp;D) and climate change goals</p> <p><b>Balance of Site (Agriculture)</b> – research new agritech to mitigate climate change</p> <p><b>Balance of Site (Wilding)</b> - offers potential for carbon off-sets</p> <p><b>Excavated Rock Pile</b> – explore climate change applications of minerals</p> <p><b>Food Supply</b> - opportunities to create climate change solutions for food production</p>	<p><b>Apprenticeship Program</b> – explore opportunities for climate change careers</p> <p><b>Food Services Training and Workforce Development</b> – create links with circular economy and reducing food waste</p> <p><b>Training and Conference Facility</b> – create synergies between climate change technologies and Research and Development R&amp;D projects</p>	<p><b>Housing</b> – demonstrate climate change mitigation through residential construction</p> <p><b>Regional Trail System Tourist</b> - year-round facility tied into some other tourist attraction aspects</p> <p><b>Project Awareness Building</b> – opportunity to showcase Project as a climate-change mitigation tool</p>
<b>Cultural awareness</b>	<p><b>Food Services Company</b> – opportunity to showcase local food in dishes served to NWMO staff and guests</p>	<p><b>Balance of Site (Agriculture)</b> – showcase agricultural heritage</p> <p><b>Balance of Site (Wilding)</b> – incorporate conservation and Indigenous learning opportunities</p> <p><b>Excavated Rock Pile</b> – utilize rocks excavated for the Project to create sculpture park at Centre of Expertise, showcasing statues of Indigenous and local cultural arts</p> <p><b>Food Supply</b> - opportunity for area producers to serve other markets</p>	<p><b>Food Services Training and Workforce Development</b> -include Mennonite or Indigenous recipes in local food and beverage</p> <p><b>NWMO Staffing</b> – incorporate local culture in onboarding</p> <p><b>Training and Conference Facility</b> – opportunities for programming and events</p>	<p><b>Housing</b> – ensure housing meets cultural needs of community</p> <p><b>Project Awareness Building</b> – positions Project as supportive to local culture and society</p>

Community Benefit	Supply Chain	Resource Use and Enhancement	Training and Recruiting	Community Initiatives
<b>Foreign direct investment</b>	<p><b>Supply Chain Related Investment</b> – opportunities to attract new investment to South Bruce</p> <p><b>Used Fuel Container Manufacturing</b> – opportunity to attract bentonite supplier / processor to South Bruce</p>	<p><b>Aggregate Supply</b> - potential to attract new investment</p> <p><b>Agritech Development</b> – opportunity to attract agritech and food processing investment to South Bruce</p> <p><b>Balance of Site (Agriculture)</b> – potential involvement of foreign investment and universities</p> <p><b>Balance of Site (Wilding)</b> – potential interest and investment by international organizations</p> <p><b>Excavated Rock Pile</b> – potential investment in local processing</p> <p><b>Food Supply</b> - opportunity for foreign investment in food processing</p>	<p><b>Food Services Training and Workforce Development</b> – invite world experts on food production and services to educate local workforce</p> <p><b>Training and Conference Facility</b> – create synergies between global enterprises, educational institutions, and Research and Development (R&amp;D) projects</p> <p><b>Underground Operations</b> – collaborate with worldwide supply chain vendors to establish operations locally</p>	<p><b>Housing</b> – opportunity to attract investment in new and diverse affordable housing</p> <p><b>Project Awareness Building</b> – opportunity to demonstrate the volume of foreign investment attracted to South Bruce by the Project</p>
<b>Green industry opportunities</b>	<p><b>Food Services Company</b> – opportunity to build circular economy initiatives into services</p> <p><b>Office Building and Grounds Maintenance</b> - opportunities to showcase new technologies</p> <p><b>Supply Chain Related Investment</b> – opportunities to showcase new technologies and business opportunities</p>	<p><b>Agritech Development</b> – Potential green initiatives</p> <p><b>Balance of Site (Agriculture)</b> – potential initiatives</p> <p><b>Balance of Site (Wilding)</b> - demonstration projects and learning opportunities</p> <p><b>Excavated Rock Pile</b> – explore green industry opportunities associated with extracted minerals</p> <p><b>Food Supply</b> – explore green industry applications for food production</p>	<p><b>Apprenticeship Program</b> – explore career opportunities</p> <p><b>Food Services Training and Workforce Development</b> – connect green industries with food services training</p> <p><b>Training and Conference Facility</b> – opportunities for programs and events</p> <p><b>Underground Operations</b> – learn about green solutions used underground that could be business opportunities</p>	<p><b>Housing</b> – create business opportunities for the local community</p> <p><b>Project Awareness Building</b> - positions nuclear as environmental contributor</p>
<b>Innovation in Agriculture</b>	<p><b>Equipment Maintenance</b> – explore synergies between equipment and technologies used for DGR and agritech</p> <p><b>Food Services Company</b> – connect agritech with food services</p> <p><b>Office Building and Grounds Maintenance</b> - share space with agricultural innovation programs</p> <p><b>Supply Chain Related Investment</b> – create synergies between agritech and</p>	<p><b>Agritech Development</b> - Far-reaching benefit that extends beyond the local area; new innovations and applications, be a strong catalyst for Research and Development (R&amp;D); provide platform that may attract international interest; promote at Centre of Expertise</p> <p><b>Balance of Site (Agriculture)</b> - demonstration project and learning opportunities</p> <p><b>Balance of Site (Wilding)</b> – opportunity to showcase alternative land use services, ecological goods, and services</p>	<p><b>Apprenticeship Program</b> – encourage young workers to consider agritech</p> <p><b>Food Services Training and Workforce Development</b> – create links with food production and agritech</p> <p><b>Training and Conference Facility</b> - attract R&amp;D projects related to new technology in agriculture</p> <p><b>Underground Operations</b>- Potential to find synergies</p>	<p><b>Housing</b> - help meet demand for affordable housing for farm workers and retirees</p> <p><b>Project Awareness Building</b> – promote the importance and impact of agriculture in the community</p>

Community Benefit	Supply Chain	Resource Use and Enhancement	Training and Recruiting	Community Initiatives
	<p>DGR Research and Development (R&amp;D)</p> <p><b>Used Fuel Container Manufacturing</b> – Potential synergies with agritech</p>	<p><b>Excavated Rock Pile</b> – research use of extracted minerals in agricultural products (e.g., soil conditioners)</p> <p><b>Food Supply</b> - opportunity to experiment with new food production technologies</p>	<p>between technologies and applications used in DGR with agritech</p>	
<b>Labour force - career opportunities</b>	<p><b>Equipment Maintenance</b> – jobs for young people residing in the area</p> <p><b>Food Services Company</b> - contributes to Tourism and Hospitality skilled talent pool</p> <p><b>Office Building and Grounds Maintenance</b> – employment opportunities</p> <p><b>Supply Chain Related Investment</b> – employment opportunities</p> <p><b>Used Fuel Container Manufacturing</b> - provide local jobs</p>	<p><b>Aggregate Supply</b> -job opportunities</p> <p><b>Agritech Development</b> - Far-reaching benefit that extends beyond the local area</p> <p><b>Balance of Site (Agriculture)</b> – job opportunities</p> <p><b>Excavated Rock Pile</b> – potential job opportunities</p> <p><b>Food Supply</b> - opportunities for new careers and employment</p>	<p><b>Apprenticeship Program</b> -proactively adds to the pool of skill trades</p> <p><b>Food Services Training and Workforce Development</b> – new career options</p> <p><b>NWMO Staffing</b> - repatriate residents, new employment opportunities</p> <p><b>Training and Conference Facility</b> – expose residents to new career options</p> <p><b>Underground Operations</b> -provide training for similar projects located elsewhere internationally</p>	<p><b>Day Care</b> - develop a model that supports flexibility for parents who are pursuing careers</p> <p><b>Housing</b> - develop the Project-affiliated campus to involve students through university programs</p> <p><b>Project Awareness Building</b> - creates a high-value employment alternative for young people</p>
<b>Labour force - skilled worker attraction</b>	<p><b>Equipment Maintenance</b> – attract new skilled workers</p> <p><b>Food Services Company</b> – attract new skilled workers</p> <p><b>Office Building and Grounds Maintenance</b> – employment opportunities</p> <p><b>Supply Chain Related Investment</b> – employment opportunities</p> <p><b>Used Fuel Container Manufacturing</b> - provide local jobs</p>	<p><b>Aggregate Supply</b> -job opportunities</p> <p><b>Agritech Development</b> - opportunities to attract skilled workers</p> <p><b>Balance of Site (Agriculture)</b> – employment opportunities</p> <p><b>Excavated Rock Pile</b> – attract professional, scientific, and technical jobs to analyze and monetize extracted minerals</p> <p><b>Food Supply</b> - opportunities to attract skilled workers</p>	<p><b>Apprenticeship Program</b> - deal with the aging skill trades workforce</p> <p><b>Food Services Training and Workforce Development</b> – attract skilled workers and employment opportunities</p> <p><b>NWMO Staffing</b> – skilled job opportunities</p> <p><b>Training and Conference Facility</b> – recruit new skilled workers via programming</p> <p><b>Underground Operations</b> - respond to medium to long term workforce requirements</p>	<p><b>Day Care</b> - centralized administration and purchasing could reduce costs</p> <p><b>Housing</b> - help meet demand for affordable housing</p> <p><b>Project Awareness Building</b> – demonstrate skilled employment increases associated with Project</p>
<b>Promotion of local culinary opportunities</b>	<p><b>Food Services Company</b> - creates a portal showcasing signature dishes from the Mennonite community and Saugeen Ojibway Nation</p>	<p><b>Agritech Development</b> – synergies with food production, food services and culinary</p> <p><b>Balance of Site (Agriculture)</b> – create synergies between sustainable agriculture</p>	<p><b>Apprenticeship Program</b> – strengthen the talent pipeline to hospitality industry</p> <p><b>Food Services Training and Workforce Development</b> –</p>	<p><b>Project Awareness Building</b> – demonstrate how the Project accelerated awareness and demand for local food and drink</p>

Community Benefit	Supply Chain	Resource Use and Enhancement	Training and Recruiting	Community Initiatives
	<p><b>Office Building and Grounds Maintenance</b> – showcase local cuisine when hosting visitors</p> <p><b>Supply Chain Related Investment</b> – increased spending and demand may attract investment for more restaurants</p>	<p>demonstrations and culinary opportunities</p> <p><b>Food Supply</b> - opportunities create synergies between local terroir, chefs, farms, food production and processing</p>	<p>showcase Mennonite community and Saugeen Ojibway Nation</p> <p><b>Training and Conference Facility</b> – opportunities for local food and skills to be showcased at events and conferences</p>	
<b>Resident attraction / Quality of life</b>	<p><b>Equipment Maintenance</b> – attract new residents</p> <p><b>Food Services Company</b> – attract new residents</p> <p><b>Office Building and Grounds Maintenance</b> – attract new residents</p> <p><b>Supply Chain Related Investment</b> – attract new residents</p> <p><b>Used Fuel Container Manufacturing</b> – attract new residents</p>	<p><b>Aggregate Supply</b> - increased jobs which may attract new residents</p> <p><b>Agritech Development</b> – encourage workers and their families to live locally</p> <p><b>Balance of Site – (Wilding)</b> synergistic trail system and recreation activities</p> <p><b>Excavated Rock Pile</b> – development of world-class rock sculpture park at Centre of Expertise</p> <p><b>Food Supply</b> - opportunities for new workers and potential residents</p>	<p><b>NWMO Staffing</b> - attract and retain young people, new residents</p> <p><b>Food Services Training and Workforce Development</b> – instructors and students should be encouraged to live in South Bruce</p> <p><b>Training and Conference Facility</b> – potential to attract workers who will choose to reside locally</p> <p><b>Underground Operations</b> - attract and retain young people, new residents</p>	<p><b>Day Care</b> - develop model that responds to needs of labour force and employers</p> <p><b>Housing</b> - help meet demand for affordable housing</p> <p><b>Project Awareness Building</b> – demonstrate Project’s positive impact on local quality of life</p> <p><b>Regional Trail System Tourist</b> - year-round facility caters to locals</p>
<b>Tourism spending increases</b>	<p><b>Food Services Company</b> – potential local food connections with farmers, chefs, cultural groups</p> <p><b>Office Building and Grounds Maintenance</b> – encourage visiting dignitaries and guests to stay and spend locally</p> <p><b>Supply Chain Related Investment</b> – increased employment and spending may support demand for tourist accommodation and hospitality investments</p>	<p><b>Agritech Development</b> – niche visitor markets related to R&amp;D, students, visiting corporate markets</p> <p><b>Balance of Site (Agriculture)</b> - attract visitors involved with sustainable agriculture, agri-business, and culinary tourism</p> <p><b>Balance of Site – (Wilding)</b> Synergistic trail system, tourism, and recreation activities</p> <p><b>Excavated Rock Pile</b> – tourism interest in world-class rock sculpture park at Centre of Expertise</p> <p><b>Food Supply</b> – encourage use of local food and promotion of local terroir in destination development and marketing</p>	<p><b>Food Services Training and Workforce Development</b> - Potential tourist destination offering culinary workshops</p> <p><b>NWMO Staffing</b> – friends and relations of new NWMO staff will boost spending when they visit South Bruce</p> <p><b>Training and Conference Facility</b> - create a market for international tourism, and attract conferences and corporate markets</p> <p><b>Underground Operations</b> – friends and relations of new NWMO staff will boost spending when they visit South Bruce</p>	<p><b>Day Care</b> - develop a model that responds to the needs of the tourism labour force and employers</p> <p><b>Housing</b> - help meet demand for affordable housing for tourism workers; reduce conflict with short-term tourism rental accommodation</p> <p><b>Project Awareness Building</b> – demonstrate Project’s ability to increase new tourism spending in South Bruce</p> <p><b>Regional Trail System Tourist</b> - year-round facility tied into some other tourist attraction aspects</p>
<b>Traffic impact mitigation</b>	<p><b>Office Building and Grounds Maintenance</b> – plan for NWMO staff commuting to minimally disruptive to local traffic</p>	<p><b>Aggregate Supply</b> - local aggregate may minimize transportation impacts to residents and road infrastructure</p>	<p><b>NWMO Staffing</b> – corporate policies and benefits could aim to mitigate traffic conflicts</p> <p><b>Underground Operations</b> – potential</p>	<p><b>Housing</b> – ensure residential and industrial traffic do not come into conflict</p> <p><b>Project Awareness Building</b> – demonstrate</p>

Community Benefit	Supply Chain	Resource Use and Enhancement	Training and Recruiting	Community Initiatives
	<p><b>Supply Chain Related Investment</b> – opportunity to alter road system to separate travelling public from industrial traffic</p>	<p><b>Excavated Rock Pile</b> – potential source of import replacement, reducing truck traffic on roads</p> <p><b>Food Supply</b> – encourage traffic design to mitigate conflicts with agricultural equipment and vehicles</p>	<p>to provide shuttle from residential area to DGR, so fewer vehicles are travelling on farm roads during shift changes</p>	<p>capacity to solve any traffic impacts</p>
<p><b>Youth retention and repatriation</b></p>	<p><b>Equipment Maintenance</b> – job opportunities</p> <p><b>Food Services Company</b> – job opportunities</p> <p><b>Office Building and Grounds Maintenance</b> – job opportunities</p> <p><b>Supply Chain Related Investment</b> – job opportunities</p> <p><b>Used Fuel Container Manufacturing</b> – job opportunities</p>	<p><b>Aggregate Supply</b> – job opportunities</p> <p><b>Agritech Development</b> – potential employment</p> <p><b>Balance of Site (Agriculture)</b> – potential employment</p> <p><b>Balance of Site – (Wilding)</b> Possible recreation opportunities</p> <p><b>Excavated Rock Pile</b> – potential job opportunities</p> <p><b>Food Supply</b> – potential employment</p>	<p><b>Apprenticeship Program</b> – provide skilled-trades training opportunities</p> <p><b>Food Services Training and Workforce Development</b> – training and employment opportunities</p> <p><b>NWMO Staffing</b> – employment and skills development opportunities for young people</p> <p><b>Training and Conference Facility</b> – opportunities for young academics and workers</p> <p><b>Underground Operations</b> – provide training for young people</p>	<p><b>Day Care</b> – develop model that helps young people stay in community to work and raise a family</p> <p><b>Housing</b> – helps meet demand for affordable housing; creates a business opportunity for the local community; developing the Project-affiliated campus could also involve students through university architectural departments</p> <p><b>Project Awareness Building</b> – demonstrate positive impacts on young people</p>

## Appendix D: Studies of Community Benefits Agreements

Figure 10: International Case Studies of Community Benefits Agreements

Nation	Location / Name	Community Benefits
Australia	<p><b>Australia National Nuclear Waste Storage Facility, Napandee, Kimba, South Australia</b></p> <p>In 2021, the <a href="#">Australian Radioactive Waste Agency</a> chose a waste site. All waste will be low-mid level radioactive. No waste will be from nuclear power plants or from nuclear weapons production. The site was chosen after 6 years of consultations and is in an agricultural community.</p>	<ul style="list-style-type: none"> <li>The federal government allocated AUS\$31 million to a <a href="#">community development package</a> to boost the skills of local businesses and workers to build and run the dump. Facility cost AUS\$200 million.</li> <li><a href="#">Round 3</a> of the Community Benefit Program is currently underway with \$2M in grant funding available for projects that increase social cohesion and economic diversity (closes March 2022).</li> <li>A <a href="#">review of grants from previous funding rounds across 2019-22</a> showed that \$4M was paid.</li> </ul>
Canada	<p><b>Gordie Howe International Bridge, Windsor, <a href="#">Community Benefits Plan</a></b></p> <p>Canada and Michigan incorporated the requirement for a Community Benefits Plan for the project into the Crossing Agreement that includes: (A) how stakeholders and community are to continue to be involved, (B) how host community input relating to community benefits and stakeholder involvement are to be factored, (C) how bidders plan to work with local institutes of higher learning, unions, and others, and (D) and how job training and local job development will be encouraged.</p>	<ul style="list-style-type: none"> <li>At least \$250 million of the total value of the work during the design-build phase in Canada will be performed by, contracted to, or supplied by workers or contractors located in Windsor, Essex County or within 100 kilometres of Windsor</li> <li>Established a goal for subcontractors to hire at least 20% of new hires from the Windsor area for construction and permanent jobs</li> <li>Foster growth of small companies in the host communities by purchasing goods, supplies, and services under a value of \$25,000</li> <li>Canadian initiatives for delivery include a Neighbourhood Infrastructure Strategy comprised of community safety and connections (\$2.13 million), aesthetics and landscaping investments (\$2.75 million), community partnerships (\$1.47 million), and other economic benefits (\$850,000)</li> </ul>
Canada	<p><b>City of Toronto <a href="#">Community Benefits Framework</a></b>: Adopted by Toronto City Council in 2019 and focuses on ways to maximize the use of City of Toronto levers (such as procurement, real estate transactions, or financial incentives for specific sectors and uses) to create inclusive and equitable economic opportunities through community benefits initiatives.</p>	<ul style="list-style-type: none"> <li>Hard targets are a key component of the City’s community benefits initiatives. To date, the City’s community benefits hard targets have focused on City levers, such as City procurement and real estate agreements, and unique scenarios like financial incentives or casino expansion approvals.</li> <li>Active Community Benefits initiatives include Housing Now; Social Procurement Policy and Program, Rexdale – Casino Woodbine Community Benefits Agreement, and Imagination, Manufacturing, Innovation, and Technology Program (IMIT)</li> </ul>
Canada	<p><b>City of Vancouver <a href="#">Community Benefit Agreements Policy</a></b></p> <p>Since 2005, the City of Vancouver has required CBAs on several large development sites. In 2018, City Council approved the Community Benefit Agreement Policy.</p>	<ul style="list-style-type: none"> <li>Prior to 2018, CBAs were not approached in a consistent or predictable manner, lacked adequate community engagement, and failed to employ consistent approaches to monitoring and reporting. Projects that have a CBA must demonstrate best efforts in meeting the following: <ul style="list-style-type: none"> <li><b>Local, inclusive employment:</b> Making 10% of new entry level jobs available to people in Vancouver first, specifically those who are equity-seeking</li> <li><b>Social procurement:</b> Procuring a minimum of 10% of material goods and services from third party certified social impact and/or equity seeking businesses, with a priority on Vancouver businesses.</li> <li><b>Local procurement:</b> Attaining 10% procurement of materials, goods and services from Vancouver companies or companies located in Metro Vancouver or British Columbia. These may or may not also be equity-seeking third party certified businesses</li> </ul> </li> <li>Mandatory CBAs are required for projects with over 45,000 square metres of floor space.</li> </ul>
Canada	<p><b>Regional Municipality of Wood Buffalo, Alberta – <a href="#">Engagement Process</a></b></p>	<ul style="list-style-type: none"> <li>Investigating a Social Procurement Program to expand the traditional understanding of ‘best value’ in procurement. To include the generation of positive societal benefits, in conjunction with high quality and competitive bids, aiming to maximize community benefits and deliver improved socio-economical returns to the Region, within the existing spend.</li> </ul>

Nation	Location / Name	Community Benefits
Canada	<p><b>Giant Mine <a href="#">Remediation Project &amp; Closure and Reclamation Plan, Yellowknife NWT</a>:</b> The 2,300-acre mine site is contaminated with arsenic trioxide dust and fibrous asbestos. Remediation seeks to clean up mine site for human and environmental safety via DGR and freezing of arsenic chambers. Co-managed by federal government, NWT and Yellowknives Dene First Nation.</p>	<ul style="list-style-type: none"> <li>▪ Governments worked together to develop a <a href="#">Community Benefits Agreement</a>., one of three agreements signed by Canada and Yellowknives Dene First Nation. The CBA provides funding up to \$20 million over 10 years to support capacity building for the First Nation to participate in the Giant Mine Remediation Project. It provides support for an economic division, scholarship and training, community-based monitoring of the site, a community economic development officer role, a community liaison and technical officer role, and a Healing the Land ceremony.</li> </ul>
Czechia	<p><b><a href="#">Deep Geological Repository Shortlist</a></b></p> <p>The Czech Cabinet <a href="#">has approved</a> a shortlist of four potential sites for a deep geological repository for used nuclear fuel and high-level radioactive nuclear waste. The government also approved a new schedule calling for the site to be selected by 2030, five years later than originally planned. The repository is expected to be operational by 2065.</p> <p><b>Sites:</b> Hrádek, in the south of the country; Horka, also in the south; Březový potok, in the southwest; and Janoch near the Temelín nuclear power station in the southwest.</p> <p><b>Test Centre</b> – underground research centre at Bukov in the central Czech Republic serves as a test site for the long-term management of radioactive waste</p>	<p><b><a href="#">Community Benefit Agreement:</a></b></p> <ul style="list-style-type: none"> <li>▪ Improvements in the quality of services</li> <li>▪ Employment (200 local and 300 regionally anticipated)</li> <li>▪ Infrastructure</li> <li>▪ Development of property prices</li> <li>▪ Financial contributions: <ul style="list-style-type: none"> <li>- <b>Exploration areas</b> - CZK 600,000 per year with a further contribution of CZK 0.40 per year for each square metre of the cadastral area of the municipality for which the exploration area has been determined.</li> <li>- <b>Protected areas</b> – The final site will receive a one-off contribution of CZK 60 million and an annual payment of CZK 600,000 and a further CZK 0.60 per square metre of owned land.</li> <li>- <b>Operation</b> – CZK 4,000,000 per year and a further contribution of CZK 10,000 for each cubic metre of radioactive waste disposed.</li> </ul> </li> </ul>
Finland	<p><b><a href="#">Onkalo Spent Nuclear Fuel Repository</a></b></p> <p><b>About:</b> It is a deep geological repository for the final disposal of spent nuclear fuel located on Olkiluoto Island in western Finland.</p> <p><b>History:</b> In 1994, new legislation required Finland to dispose of nuclear waste in country. Site selection started in 1983 with construction beginning in 2004. Operations are expected to begin in 2023.</p> <p><b>Lead:</b> The facility was constructed by and will be operated by <a href="#">Posiva</a>, a company owned by the two existing producers of nuclear power in Finland, Fortum and TVO.</p>	<ul style="list-style-type: none"> <li>▪ No fund as such, but <a href="#">a particular tax rate</a> on real estate tax for nuclear installations of 2.5% (as compared to 0.5% on average). In principle only to start once the construction of the disposal facility.</li> <li>▪ In 2021, a <a href="#">Code of Conduct published</a> with outlined corporate social responsibility.</li> <li>▪ Another benefit received in Olkiluotu was a loan given by Posiva for the construction of a <a href="#">new nursing home for the elderly and a multipurpose congress center in Eurajok</a>.</li> </ul>
France	<p><b><a href="#">Andra</a></b></p> <ul style="list-style-type: none"> <li>▪ <b>About:</b> Andra is responsible for identifying, implementing, and guaranteeing safe management solutions for all French radioactive waste.</li> <li>▪ <b>Site:</b> (1) <a href="#">Cigeo</a> – The Industrial Centre for Geological Disposal, or Cigeo, is a deep geological disposal facility for radioactive waste to be constructed in 2025.</li> <li>▪ <b>Site:</b> (2) <a href="#">Meuse Meuse/Haute Marne Underground Research Laboratory</a>, is a laboratory located 500 metres underground in Bure.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">Cigeo Regional Development Project</a> (PDT) signed in Oct 2019 is a roadmap for land-use planning and economic development in Cigeo's host region.</li> <li>▪ This <a href="#">document</a> aims for the area around Cigeo, to create an environment conducive to ensuring the success of the project, boosting growth in the region and improving quality of life for its inhabitants.</li> <li>▪ The document involves multiple stakeholders with over 64 projects.</li> <li>▪ More than half of the projects that are being formalised concern infrastructure developments prior to the construction of Cigeo (road and rail networks, drinking water supply, etc.) and socio-economic support initiatives (creation of business parks to accommodate companies, development of skilled jobs, housing renovation, creation of amenities and services for the local population).</li> </ul>

Nation	Location / Name	Community Benefits
	<ul style="list-style-type: none"> <li>▪ <b>Site:</b> (3) Centre de l'Aube – low level and short-lived intermediate level radioactive near-surface repository built in 1992.</li> </ul>	<ul style="list-style-type: none"> <li>▪ They will be carried out from 2020 involving a budget of more than <b>€500 million</b>.</li> <li>▪ Other actions, for which the scope is yet to be clarified and confirmed, are also planned in the longer term to enhance the attractiveness of the region through structural development measures and create the conditions for economic and environmental excellence.</li> </ul> <p><b>Underground Research Facility</b></p> <ul style="list-style-type: none"> <li>▪ <a href="#">The facility raised funds</a> for the reconstruction of roads and other infrastructure, an Experimental Technology Centre (CTE), prototype biomass fuel facility, training of local emergency response groups, improvements to firms, bids, and tender process and local development activities.</li> <li>▪ <a href="#">From 1996-2006</a>– there was an allocation of 20 M EUR for projects in 33 municipalities which increased to 20M after 2007.</li> </ul>
<b>Germany</b>	<p><a href="#">BGE</a></p> <ul style="list-style-type: none"> <li>▪ <b>About:</b> The BGE is mandated by the German government to perform tasks in the final disposal of radioactive waste.</li> <li>▪ <b>Sites:</b> Since April 2017, the BGE has been the responsible operator of the German repository projects <a href="#">Konrad</a> and <a href="#">Morsleben</a> as well as the Asse mine. BGE is currently looking for a suitable DGR site in Germany.</li> </ul> <p><a href="#">Gorleben Nuclear Waste Repository</a></p> <ul style="list-style-type: none"> <li>▪ <b>About:</b> Previously planned location for a national deep geological repository for radioactive waste there.</li> <li>▪ <b>History:</b> As of September 28th, 2020 this is no longer the case as the entire area has been deemed unfit by 70 geologists in a national geographic survey for final repositories. It has attracted frequent protests from environmentalists since the 1970s.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Lengthy community consultation process once possible DGR sites are selected.</li> </ul> <ul style="list-style-type: none"> <li>▪ Allocation of an annual amount from Federal Government to the State (Lower Saxony), the District (Lüchow-Danneberg), the host community and its neighbour to support infrastructure projects.</li> <li>▪ support for local socio-cultural organisations</li> <li>▪ compensation for land use</li> <li>▪ roads and railway train station</li> </ul>
<b>Japan</b>	<p><b>Nuclear Waste Management Organization of Japan (NUMO)</b></p> <p><b>About:</b> NUMO is responsible for selecting a permanent deep geological repository site, construction, operation, and closure of the facility for waste emplacement by 2040.</p> <p><b>Site Selection:</b> Follows the <a href="#">Radioactive Waste Final Disposal Act</a>. As of 2020, NUMO began the initial stage of assessing two municipalities for their suitability to host a final disposal facility for high-level radioactive waste.</p>	<ul style="list-style-type: none"> <li>▪ The CBA is currently under negotiation with the select host community to be determined.</li> <li>▪ As an <a href="#">enticement</a>, the central government offered up to JPY2 billion (USD19 million) in grants to applicant municipalities in the first stage.</li> </ul>
<b>South Korea</b>	<p><a href="#">Wolseong Low and Intermediate Level Radioactive Waste Disposal Centre (WLDC)</a></p> <p>The facility houses Low to Intermediate Level radioactive waste (LILW) at <a href="#">Gyeongju</a>. The facility features a silo-type design, and its first stage allowed for up to 100,000 barrels of storage, which increased to a total capacity of 800,000 upon completion of the final stage.</p>	<p><b>Community Benefit Agreement:</b></p> <ul style="list-style-type: none"> <li>▪ Increased prospect of jobs</li> <li>▪ A proposed payment of 300 billion Won (\$270 million)</li> <li>▪ Ongoing payments are proposed of 637,500 Won per waste drum</li> <li>▪ Relocation to the city hosting the silo site of the headquarters of Korean Hydro and Nuclear Power</li> </ul>
<b>Spain</b>	<p><a href="#">El Cabril Nuclear Waste Disposal Facility</a></p> <p><b>About:</b> El Cabril is the Spanish disposal facility for very low, low, and intermediate level radioactive waste.</p>	<ul style="list-style-type: none"> <li>▪ Combination of fixed and variable sum allocated annually (in 2008: 1.24 M EUR) to host community and 3 neighbours; from 1992 onward until decommissioning of the site.</li> <li>▪ Reconstruction and upgrading of local roads</li> <li>▪ Nature information centre</li> </ul>

Nation	Location / Name	Community Benefits
	<p>It is located within the municipal area of Hornachuelos (Córdoba).</p> <p><b>Future Projects:</b></p> <ul style="list-style-type: none"> <li>- In July 2021, Spain launched a tender for new used fuel storage facilities.</li> </ul>	<ul style="list-style-type: none"> <li>Support for local schools</li> <li>Training of local sub-contractors</li> <li>Lab facilities are available for use by universities and administrators.</li> </ul>
Sweden	<p><a href="#">SKB, Forsmark Nuclear Waste Storage Facility</a></p> <p><b>About:</b> On the 27th of January 2022, the Swedish Government approved SKB to build a final repository for spent nuclear fuel in Forsmark in Östhammar Municipality and an encapsulation plant in Oskarshamn. 8 communities were initially considered for the site, with SKB announcing Östhammar as the host community for the repository in 2009.</p>	<ul style="list-style-type: none"> <li>The municipality can apply for to review SKB's work, inform citizens, and conduct other activities.</li> <li>The <a href="#">Nuclear Waste Fund</a> is a government authority whose mission is to receive and manage the fees paid in by the nuclear power companies and owners of other nuclear facilities in Sweden. In the 2020 <a href="#">Annual Report</a>, Östhammar municipality received \$5,021,000 Swedish Kronor or US \$550K.</li> <li>A <a href="#">National Coordinator on Nuclear Waste</a> was appointed to coordinate information, contacts between the various municipal stakeholders.</li> <li>An <a href="#">Added Value Program</a> was developed during negotiation that included compensation for the municipality that would 'lose' the race for the repository. In 2009, EUR 160–216 million was agreed, guaranteeing that the 'loser' would receive the majority (75%) of the compensation.</li> <li>Active consultation with community members formed part of this process, with a 'dialogue tour' held to inform residents.</li> </ul>
Switzerland	<p><a href="#">Nagra – National Cooperative for the Disposal of Radioactive Waste</a></p> <ul style="list-style-type: none"> <li><b>What:</b> Establish in 1972, company disposes of Switzerland's radioactive waste in a DGR facility – on behalf of the nation.</li> <li><b>Sites:</b> (3) sitting regions are considered, <a href="#">Jura-Ost</a>, <a href="#">Nördlich Lägern</a>, <a href="#">Zürich Nordost</a> with the site to be selected in 2022 during stage 3 of the process.</li> </ul> <p>Zwilag</p> <ul style="list-style-type: none"> <li><b>What:</b> The Zwilag is an interim storage facility for all categories of radioactive waste in Switzerland in operation since 2001.</li> <li><b>Site:</b> It is located next to the Paul Scherrer Institute (PSI) site in Würenlingen.</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Compensation</a> is open to negotiation at stage 3 of the sectoral plan and would be paid by waste producers upon the award of a general licence to proceed with GDF development.</li> <li><a href="#">During stage three</a> the siting region will propose projects for regional development and prepare the background for possible compensation payments, relating to any conflicts between the facility and the local development plan.</li> </ul> <ul style="list-style-type: none"> <li>Additional to taxes, allocation of annual amount of 1.1 M EUR 2008 (index-linked, adjusted every 5 years) <a href="#">to host community and 3 neighbours</a>; for a period of 25 years, starting from beginning of construction (1996)</li> </ul>
United Kingdom	<p><b>Sellafield, UK</b></p> <p><b>About</b> – a large multi-function nuclear site close to Seascale on the coast of Cumbria, England. As of August 2020, activities at the site include nuclear fuel reprocessing, nuclear waste storage and nuclear decommissioning, and it is a former nuclear power generating site. It houses roughly 75% of the UK's current nuclear waste.</p> <p><b>Search for a UK Geological Disposal Facility (GDF) underway 2022</b></p> <p><b>About:</b> The UK is exploring options to create a GDF to house its nuclear waste.</p> <p><b>Sites:</b> <a href="#">Three sites</a> in the north of England are currently being assessed.</p> <ul style="list-style-type: none"> <li>- <a href="#">Allerdale Geological Disposal Facility (GDF) Community Partnership</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Social Impact Strategy</a> – the strategy aims to deliver the maximum social impact from <a href="#">the £2 billion spent at Sellafield every year</a>. 5 social impact objectives are identified. In 2020, the <a href="#">Transforming West Cumbria</a> project valued at £2.2 million was announced to help West Cumbria's most vulnerable communities.</li> <li><a href="#">Responsible procurement policy</a> was introduced that companies who bid for work at Sellafield must show how they will support the community if they win.</li> <li>In 2016, a <a href="#">crowdsourcing policy</a> was announced where the public could decide where funding is spent.</li> </ul> <p><b>Community Benefit Agreements under negotiation:</b></p> <ul style="list-style-type: none"> <li>Formation of the Community Partnership <a href="#">unlocks £1 million per year of community investment funding</a> for initiatives supporting economic development opportunities, improving community well-being, or enhancing the local environment. This amount could rise to £2.5 million later in the process.</li> <li>Working groups have been set up in two boroughs to discuss possible disposal facilities.</li> <li>Community Partnership group forms 2022<sup>52</sup></li> <li>Benefits video: <a href="https://youtu.be/0xvnl3aYQWI">youtu.be/0xvnl3aYQWI</a></li> </ul>

<sup>52</sup> <https://www.gov.uk/government/news/allerdale-gdf-community-partnership-forms>

Nation	Location / Name	Community Benefits
	<ul style="list-style-type: none"> <li>- <a href="#">Mid Copeland GDF Community Partnership</a></li> <li>- <a href="#">South Copeland GDF Community Partnership</a></li> </ul>	
<p><b>United States</b></p>	<p><b>Yucca Mountain, Nevada</b><sup>53</sup>  <b>About:</b> Was a proposed deep geological repository storage facility within Yucca Mountain for spent nuclear fuel and other high-level radioactive waste in the United States. However, due to lobbying groups and lack of political support, construction of the facility has not begun.</p> <p><b>Waste Isolation Pilot Plant (WIPP), Carlsbad New Mexico</b>                      The world's third deep geological repository and is licensed to store transuranic radioactive waste for 10,000 years. The waste is from the research and production of United States nuclear weapons only.  <b>History</b> – The plant started operation in 1999, and the project is estimated to cost \$19 billion in total.</p>	<ul style="list-style-type: none"> <li>▪ An information centre, financing for independent local monitoring, funding for emergency response, training and equipment, training and technical assistance for politicians, logistical support for local schools and donations of equipment to local offices.</li> <li>▪ A payment equivalent to taxes was proposed to local government units.</li> </ul> <p>Carlsbad received several social benefits including:</p> <ul style="list-style-type: none"> <li>▪ <b>Large investment in local educational facilities</b> e.g., a multi-million-dollar campus for New Mexico State University named the Carlsbad Environmental Monitoring and Research Centre</li> <li>▪ The development of an <b>Advanced Manufacturing and Innovation Training Centre</b>, which serves for academic and technical education, as well as serving as a business incubator.</li> <li>▪ <b>Established environmental or hazardous materials education and training programmes</b>, as well as the establishment of the Centre for Hazardous Waste Management Excellence, and the Records Centre</li> <li>▪ <b>Other:</b> grant funding for school equipment, grant writing courses, fund for local charities.</li> <li>▪ The project was estimated to of employed 1000 direct jobs, \$US 22 in local procurement, and US\$250 was supplied to the state for economic impact investments, WIPP initiated a technology transfer program to over 300 organizations.</li> <li>▪ <b>WIPP acceleration fund</b> – an annual amount for investments in infrastructure, education, and economic development.</li> <li>▪ <b>WIPP road fund</b> – annual amount for the local state highway department to offset costs on transportation infrastructure.</li> </ul>

<sup>53</sup> <https://m.lasvegassun.com/news/2021/dec/03/nevadans-concerned-about-nuclear-waste-can-breathe/>

## Appendix E: Local Economic Development Strategy 2021

Priority	Action	2021	2022	2023	2024
<b>Strategic Objective 1: Foundations and Follow-Through</b>					
1A: Activate human resources	Provide resources to promote South Bruce and nurture collaboration				
	Advance Strategic Objective #2 ("Agri-Business Reboot")				
	Enable Strategic Objective #3 ("Village Revival")				
	Collaborate with other governments and agencies				
1B: Increase flexibility and relevance of policies and tactics	Consult, identify and reduce burdens				
	Update Official Plan and Zoning By-Law				
	Adapt Community Improvement Plan incentives				
	Modernize marketing and communications				
1C: Accelerate infrastructure investments	Prepare employment lands inventory				
	Review servicing capacity				
<b>Strategic Objective 2: Agri-Business Reboot</b>					
2A: Lead the way in agricultural innovation	Become the champion for value-added agriculture				
	Develop alliances with neighbouring communities				
	Create an agri-business innovation hub				
2B: Enable investments in value-added agriculture	Activate farm enterprise zones and on-farm uses				
	Collaborate with farmers				
<b>Strategic Objective 3: Village Revival</b>					
3A: Ensure villages are shovel-ready	Prepare asset inventory and areas of potential				
	Enhance infrastructure to meet future needs				
3B: Double-down on support for village revitalization	Enhance business incentives				
	Provide grants to community groups				
	Match value-added food with village businesses				
3C: Embrace diversity in business & culture	Celebrate inclusive businesses and groups				
	Implement resident/entrepreneur attraction plan				
	Coordinate grants aimed at welcoming newcomers				

## Appendix F: SOARR Analysis (without NWMO)

To shape the Strategic Priorities of the 2021 Economic Development Strategy Update (without NWMO), an analysis of strengths, opportunities, aspirations, risks, and results (SOARR) was prepared based on the document review, economic analysis, and business and community engagement.

Strengths and aspirations help build an asset-based community development model. By leveraging known opportunities and understanding likely risks, desired results or outcomes can be mapped out under a series of objectives and action steps later in the process.

### Strengths

- Relatively affordable dwelling prices
- Lower cost of living
- Proximity to larger urban areas
- High quality of life
- Engaged, involved, supportive community
- Natural beauty and resources
- Business diversity and resilience
- Strong agriculture sector

### Opportunities

- Agri-business growth, value-added goods, culinary, ag tech
- Cleantech, nuclear supply chain
- Construction materials, logistics
- Leverage stronger partnerships, alignment with County and others
- Resources and infrastructure to respond to growth
- Proactive residential development, main street revitalization
- Staffing to support business growth
- More child daycare
- Alignment between the pace of life and tourism, newcomers

### Aspirations

- Successful agriculture supply chain
- New investment in downtowns, improved mix of housing
- Attract new, diverse residents, retain young adults, seniors
- Solid physical infrastructure for anticipated growth
- Better cell network and rural broadband
- Investment readiness for industrial development
- Proud, involved residents who are welcoming to newcomers
- Municipal staff resources and support for businesses

## Risks

- Lack of proactive planning hinders growth timelines
- Nearby communities capture residential development gains
- Missed opportunity to leverage ag trends, keep farms connected to the local economy
- Poor internet affects innovation
- Villages stagnate or decline socially and economically
- Investors deterred by opposition to new development
- Newcomers feel unwelcome to settle in the community
- External influences take control of the economic agenda in South Bruce

## Results

- New housing starts and more residential building permits
- Population increase, more new residents
- More farmers and locally made food products
- Increase in farm receipts, investment
- More serviced employment lands
- More local jobs
- Village cores are vibrant and resilient
- High satisfaction rates by residents, business
- Businesses connected to broadband internet
- Additional staff to support economic development, agri-business initiatives



Deloitte, one of Canada's leading professional services firms, provides audit, tax, consulting, and financial advisory services. Deloitte LLP, an Ontario limited liability partnership, is the Canadian member firm of Deloitte Touche Tohmatsu Limited.

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee, and its network of member firms, each of which is a legally separate and independent entity. Please see [www.deloitte.com/about](http://www.deloitte.com/about) for a detailed description of the legal structure of Deloitte Touche Tohmatsu Limited and its member firms.

The information contained herein is not intended to substitute for competent professional advice.