

**Studies:**South Bruce Economic Development  
Project Effects and Strategy

Agriculture Business Impact Study

Tourism Industry Effects Study

## South Bruce Economy

The Municipality of South Bruce and the Nuclear Waste Management Organization (NWMO) are conducting a wide range of studies to inform the community's willingness to host the NWMO Project. All studies are also being reviewed by peer reviewers who are subject matter experts in their field. The Agriculture Business Impact Study, South Bruce Economic Development Project Effects and Strategy, and Tourism Industry Effects Study were presented at the Community Liaison Committee (CLC) meeting on August 4th, 2022.

### Highlights

- The NWMO Project would provide opportunities for economic growth through the supply chain and beyond, with potential growth in construction, equipment manufacturing and maintenance.
- South Bruce's vital agricultural sector is responsible for nearly one-third of local jobs. If the Project is sited in South Bruce, the NWMO could support this sector by developing a commodity value protection program and mitigating negative impacts like traffic and local labour competition.
- There is an opportunity to expand South Bruce tourism, including agri-tourism, culinary tourism, outdoor amenities and event-based tourism. Currently South Bruce does not have a core tourism attraction. The proposed Centre of Expertise could be developed into a world-class facility to host international guests, were the Project to come to South Bruce and if dynamic programming were used.
- Through careful, cautious, and thorough negotiations with the NWMO on a hosting agreement, the Municipality will work to maximize benefits of the Project to the community.

### Addressing Our Guiding Principles

The studies address several of the community's 36 Guiding Principles to determine if the Project is right for South Bruce. They relate to whether the Project will bring meaningful benefit to the community, specifically:

- 5.** The NWMO must commit to implementing the Project in a manner consistent with the unique natural and agricultural character of the community of South Bruce.
- 10.** The NWMO will identify the potential for any positive and negative socio-economic impacts of the Project on South Bruce and surrounding communities and what community benefits it will contribute to mitigate any potential risks.
- 12.** The NWMO, in consultation with the Municipality, will establish a program to mitigate losses to business owners in the event that their business is adversely affected by the NWMO's site selection process and the development, construction and/or operation of the Project.
- 13.** The NWMO, in partnership with the Municipality, will develop a strategy and fund a program to promote the agriculture of South Bruce and the surrounding communities.
- 14.** The NWMO, in partnership with the Municipality, will develop a strategy and fund a program to promote tourism in South Bruce and the surrounding communities.
- 19.** The NWMO will, in consultation with the Municipality, establish a Centre of Expertise at a location within South Bruce to be developed in conjunction with the Project.
- 21.** The NWMO, in consultation with the Municipality, will commit to implementing a business opportunities strategy that will provide opportunities for qualified local businesses to secure agreements that support the Project and that requires the NWMO to take all reasonable steps to create opportunities for qualified local businesses to benefit from the Project.
- 22.** The NWMO will commit to implementing a procurement strategy for the Project that gives preference to the selection of suppliers who can demonstrate economic benefit to South Bruce and surrounding communities.
- 23.** The NWMO will enter into an agreement with the Municipality providing for community benefit payments to the Municipality.

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# Agriculture Business Impact Study

Study By Deloitte Peer Review Conducted By GHD

## Municipally-led Study:

This work was conducted by consultants hired by South Bruce to determine the potential impact on our municipality.

## What was the scope and purpose of the study?

- Describe the current agriculture/agribusiness profile of the local area and potential changes the Project could cause to agriculture/agribusiness operations.
- Describe possible strategies for using NWMO lands in creating new agribusiness opportunities.
- Outline strategies to address the possible reduction in value of agriculture products as a result of the Project.

## How was the study conducted?

- Agricultural stakeholders' input was gathered through interviews, public workshops, and stakeholder questionnaires in South Bruce and portions of Huron-Kinloss.
- Consultants studied how similar waste management projects in other countries affected the local economy and agriculture.
- Consultants also reviewed local economic data and background materials for insights on agriculture and used nuclear fuel storage in Ontario.

## What did South Bruce's peer reviewers say?

- Woodlots, wetlands, environmentally sensitive areas and potential future development of aggregate reserves may limit the use of proposed NWMO lands.
- Designated high capacity, safe haul routes would be required to reduce impact on agricultural operations.
- Training for next generation agriculture owners/labourers should be emphasized.
- Develop focused initiatives for specific types of farming in the community, ex. commercial vs. direct sales.

### Radiation Safety Institute of Canada Peer Review Results

- The Radiation Safety Institute of Canada, a subcontractor of GHD, conducted an additional Peer Review.
- There does not appear to be any current stigma or boycott due to a perceived risk of radiological contamination of foods grown around operating nuclear power plants.
- There is a very limited potential for contamination spread within a DGR facility, such that there is no risk for widespread contamination of food grown or processed in the immediate area.

## What did we learn?

- The size of farms in South Bruce is increasing, but the number of farms is decreasing. Most farms in South Bruce are sole proprietorships or partnerships - which aligns with county and provincial averages.
- In South Bruce in 2021, agriculture employed 523 workers. Of this total, 132 people work in animal production, which includes dairy farming.
- A worldwide survey of nuclear fuel storage facilities in farming areas found that there was no evidence of risk to agriculture yield, product safety, or commodity prices.
- As an organization controlled by the Canadian Nuclear Safety Commission, the NWMO, similar to Bruce Power, will be required to provide safety monitoring of the Project to give ongoing evidence of the level of risks or health concerns (or lack thereof) associated with food, crops, or livestock commodities produced surrounding the Project.

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## South Bruce Economic Development Project Effects and Strategy

Study By Deloitte Peer Review Conducted By GHD

### Municipally-led Study:

This work was conducted by consultants hired by South Bruce to determine the potential impact on our municipality.

### What was the scope and purpose of the study?

- Describe South Bruce's economy, with special focus on the energy, nuclear, and construction sectors.
- Outline the potential economic and commercial development opportunities of the Project and potential strategies for leveraging it for growth.
- Identify potential economic partnerships between current South Bruce businesses and the NWMO which would produce mutual benefits and encourage local development.

### How was the study conducted?

- The study builds on the 2021 Economic Development Strategy Update, which did not include the Project in its analysis.
- Experts consulted NWMO Project plans to review which local businesses could potentially be integrated into the Project supply chain.
- Experts studied Community Benefits Agreements in other communities to see what South Bruce could learn from and improve upon in its own negotiations.
- Consultants used secondary data from *metroeconomics*, EMSI Analyst, Canadian Business Counts, and Manifold Data Mining for information on housing, employment, and occupational trends.

### What did South Bruce's peer reviewers say?

- A monitoring program for the effectiveness of economic development initiatives should be considered.
- Peer reviewers also asked the study consultants for several clarifications which are reflected in their final report, such as providing greater clarity on different types of economic opportunities to better identify induced economic growth from the Project.
- The peer reviewers note that lands available for agriculture opportunities at the DGR Site may be restricted by current Official Plan restrictions, sensitive lands, aggregate deposits, etc.

### What did we learn?

- Some qualified South Bruce businesses have the potential to supply goods and services to the Project.
- Maximizing the number of existing South Bruce businesses as suppliers to the Project and getting new suppliers to locate their operations in South Bruce will take planning and effort.
- Competition for labour may limit the opportunity for growth for some South Bruce businesses.
- To ensure the full benefits of the Project are realized, South Bruce must negotiate community benefits frameworks and agreements which outline tangible goals and the necessary enforcement tools and initiatives to achieve them

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# Tourism Industry Effects Study

Study By Deloitte Peer Review Conducted By GHD

## Municipally-led Study:

This work was conducted by consultants hired by South Bruce to determine the potential impact on our municipality.

## What was the scope and purpose of the study?

- Identify the current tourism profile of South Bruce and how tourism might change if South Bruce is selected to host the NWMO Project.
- Outline possible strategies for expanding the tourism industry in South Bruce in a way that would balance change with maintaining the natural and agricultural character of the community.

## How was the study conducted?

- Consultants conducted a Local Tourism Asset Analysis on local destinations, including a review of the business' online visibility, Google reviews, TripAdvisor reviews, and potential for tourism development.
- The study reviewed common travel routes which take visitors through South Bruce and identified attractions in South Bruce which could stand out for passers-by.
- Experts looked at the effects of the recent and ongoing Covid-19 pandemic to predict the attention and time the tourism industry will need to recover.
- The consultants used a provincial tourism economic impact model to predict the economic impacts of the Centre of Expertise on South Bruce's tourism industry under different scenarios.

## What did South Bruce's peer reviewers say?

- Reviewers recommended several additions which are included in the final report. These included:
  - expanding sections on the current tourism industry
  - more information on potential changes in tourism demand with the development of the NWMO Project
  - cross references to other Community Studies, including potential effects and relevant mitigation measures, so the results are better integrated.
  - the results of tourism related uses and programs at similar facilities

## What did we learn?

- South Bruce could develop a tourism strategy and clear framework for the private sector, including the potential Centre of Expertise.
- The Centre of Expertise could become an international host facility to attract visitors, spending, and investment.
- The Municipality should have input on design, construction, and operation of Centre of Expertise to ensure it is aligned with community objectives.
- Financial partnerships with NWMO, other organizations, and private sector should be developed to maximize impact of Centre of Expertise.

## "Meet the Experts" August 25, 2022 7-9 p.m. via Zoom

Authors and peer review consultants will be available to answer questions on the South Bruce Economic Development Project Effects and Strategy, Agriculture Business Impacts Study, Tourism Industry Effects Study, Economic Development Study on Youth, Local/Regional Education Study, and the Effects on Recreational Resources Study.