

Proprietary Economic Modeling and Impact Analysis  
for the Comox Strathcona Regional District

*Inventory and Assessment of Regional Economic Development  
Reports and Studies : Annotated Review*

Report # 2 of 5, March, 2005

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# Inventory and Assessment of Regional Economic Development Reports and Studies : Annotated Review

## Comox Strathcona Regional District

### Overview

As part of the economic development modeling mandate carried out, in regards to the Regional District of Comox-Strathcona, it was key to access and review existing studies and reports that dealt with economic development within the study region. All efforts were made to locate available regional and sectoral studies. In some cases, only annotated information of the study was available. The goal was not only to identify existing opportunities, but also to assess their 'commonality' (similar or identical initiatives have been developed over a number of studies), and to combine action planning / implementation recommendations.

Further, the results of this exercise were utilized to carry out the next stage of the economic development modeling process, namely, to identify how 'implementation ready' the opportunities may be, and where the gaps may represent roadblocks towards bringing economic initiatives to fruition.

During review of the reports, where opportunities were identified in older reports and subsequently discovered to have been completed due to reference in more recent reports or general knowledge (i.e. completion of the four lane highway in Campbell River), these opportunities have been left out of this review due to them no longer being relevant. There still may be opportunities listed that have been completed but were not made apparent to the reviewer.

A total of **74** studies and reports (primarily 1998 and up until present) that address economic development and opportunities were identified and reviewed.

For purposed of this analysis, the studies have been grouped into the following sections:

- **General (covers more than one economic sector)**
- **Agriculture**
- **Aquaculture and Fisheries**
- **Energy (including 'Oil and Gas') and Mining**
- **Forestry (including Value-added)**
- **Tourism and Recreation**
- **Transportation**

General cross-sector studies and Forestry dominated, with 23 and 23 reports each, followed by Tourism with 11 studies, Transportation with 7 and Aquaculture and Fishing with 6 studies. Energy / Mining and Agriculture had 2 studies each.

For cross-referencing purposes, studies have been numbered, 1 to 73 (a later added report is numbered 2a, thus the discrepancy in number of reports versus numbering). Analysis work throughout has been referenced using these study identification numbers, so that the reader can readily access additional study details.

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The reports were analyzed using three methods:-

<b>Title</b>	<b>Contents</b>
<b><i>Executive Summary: Commonality of Opportunities</i></b>	<b>Executive Summary: Highlights of key areas of opportunity, by economic sector.</b> Represents a snapshot of all identified initiatives for resource based economic development, and cross referenced as to where these ideas originated from, and in what context they were originally presented, developed and recommended.
<b><i>Annotated Inventory of Studies</i></b>	Presents an <b>overview of the contents and results of each of the 74 studies.</b>
<b><i>Key Findings Derived from the Existing Studies</i></b>	<b>Key study findings (initiatives, opportunities, SWOT, action planning, etc.).</b> This is presented under separate cover.

The **Inventory of Studies** focuses on key opportunities identified.

**‘Opportunities’** are specific initiatives that can be realized and quantified.

It is the ‘opportunities’ that, at the end of the day, represent a game plan that, if followed through, can deliver quantifiable economic benefits for the Region.

### **Key Findings : Opportunities**

#### **Agriculture**

- Agri-tourism
- Agro-forestry
- Food Manufacturing
- Niche Market Foods
- Bottled Water

#### **Aquaculture and Fisheries**

- Shellfish Farming including First Nations ventures
- Value-added Seafood Processing
- Land-based Aquaculture
- Finfish Aquaculture
- Limited Commercial Fleet expansion
- Commercial and recreation supplies and services

#### **Energy and Mining**

- “Green Power” (including wind, solar, fuel cells)
- Small-scale Hydro Power
- Coalbed Methane and Coal Fired Power
- Offshore Exploration

# Inventory and Assessment of Regional Economic Development Reports and Studies : Annotated Review

## Comox Strathcona Regional District

- Landfill Gas, Refuse, Wood-waste Power Generation, Ethanol Production Plant
- Fabricated Metal Manufacturing
- Dimension Stone

### Forestry

- Small scale harvesting, value – added manufacturing and custom sawmilling
- Veneer slicing plant
- Botanical Forest Products and value – added processing, including First Nations involvement in this sector
- Prefab home, stair and handrails manufacturing
- Community Forest License
- Crafts and salvage / driftwood accessories production
- Log and Timber Frame Houses
- Value-added Village/Co-operative
- Log Yard/Handling/Storage
- Forestry Contracting
- Specialty Wood Drying
- Furniture – solid wood, ready-to-assemble
- Flooring – solid wood strip and plank
- Specialty Products
- Relocation of secondary manufacturing to develop industrial colony
- Woodlot Co-operative
- First Nations Joint Ventures
- Shake and Shingle

### Services

- Nursing and Residential care
- Retail and Wholesale
- Retirement Living

### Technology

- Information and Data Processing Services
- High Technology
- Motion Picture and Sound Recording

### Tourism and Recreation

- Lodges – sportsfishing, high-end
- Guided Wildlife Viewing, Ecotourism
- Recreation Fishing
- Ocean and Whitewater Kayaking
- Equipment Rental and Land and Water Shuttle Services
- Heritage and Cultural Tourism - to appeal to European and Asian client base, including events, interpretive tours and craft development
- Enhanced Marine Activities;- scuba diving, wind surfing, guided fishing, cruising

# Inventory and Assessment of Regional Economic Development Reports and Studies : Annotated Review

## Comox Strathcona Regional District

- Cruise Ship Visits and Tourism Events, Pocket Cruise Industry
- Land and Marine Hut-to-Hut
- Trail Development – continuation of the West Coast Trail, Nootka Island
- Motorized Adventures
- Accommodations and Restaurants
- Retreats, Holistic Experiences and Spas
- Boat Moorage, Public Docks and Marina
- Amusement, Gambling, Urbanized recreation
- Staging Areas
- Retail
- Joint Ventures with First Nations
- Visitor Information Centres and Kiosks
- Land Activities

### Transportation

- Air Cargo
- Related Services to Air Transportation
- Development of Industrial Lands Adjacent to Airport
- Related Warehousing
- Ground Transportation
- Deep Water Moorage Facility

Again, any of the above opportunities can be found within the following three analysis efforts, including a cross – referencing by study number for easy access to more detailed information.

<b>Title</b>	<b>Contents</b>
<b><i>Executive Summary: Commonality of Opportunities</i></b>	<b>Executive Summary: Highlights of key areas of opportunity, by economic sector.</b> Represents a snapshot of all identified initiatives for resource based economic development, and cross referenced as to where these ideas originated from, and in what context they were originally presented, developed and recommended.
<b><i>Report # 2 :Annotated Inventory of Studies</i></b>	Presents an <b>overview of the contents and results of each of the 74 studies.</b>
<b><i>Report # 3 :Key Findings Derived from the Existing Studies</i></b>	<b>Key study findings (initiatives, opportunities, SWOT, action planning, inter-relation with the LRMP, etc.).</b> This is presented under separate cover.

**The information in this 'Inventory of Studies –Opportunities' is a summary presentation of the findings from previous studies carried out for, and / or encompassing the Regional District, and is not a review of the validity or feasibility of any of those findings and recommendations.**

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2	<b><i>Campbell River, Bridging the Gaps</i></b> , Rivercorp, 2004	13
2a	<b><i>Campbell River Economic Condition</i></b> , , Campbell River EDC Rivercorp, February 2005.	14
3	<b><i>Campbell River Targeted Economic Development Marketing and Communications Strategy, 2005</i></b> , Rivercorp, 2005	14
4	<b><i>Central Coast Land and Coast Resource Management Plan</i></b> , March 2001	14
5	<b><i>Comox Valley Economic Sector Profiles – Final Report</i></b> , Crunch Analytics, November 2002	15
6	<b><i>Comox Valley Economic Development Strategy, Phase 1</i></b> , Vann Struth Consulting Group, November 4, 2004	15
7	<b><i>Economic Development Strategy Update for the Village of Gold River</i></b> , Westland Resource Group et al., 1999	16
8	<b><i>Final Report FRBC Initiative No. 6, Community Commitment</i></b> , Sayward Futures Society, 2002	16
9	<b><i>Kyuquot Region Forest Sector Strategic Plan</i></b> , Synergy Management Group Ltd., 1998	16
10	<b><i>The Kyuquot Sound Coastal Plan</i></b> , MSRM, Draft March 17 <sup>th</sup> , 2003	16
11	<b><i>Local Economic Analysis: Campbell River Market Region, Draft Report</i></b> , Rivercorp, MMK Consulting & Vann Struth Consulting Group, March 2004	17
12	<b><i>North Island Straits Economic Opportunities Marketing Plan, Phase 1: Identification of Opportunities</i></b> , Daystar Marketing, May 2003	17
13	<b><i>North Island Straits Integrated Coastal Plan</i></b> , Ministry of Sustainable Resource Management, December 2002	18
14	<b><i>Outlook, The Faces of Forum '98, Forging the Economic Direction of Campbell River's Future</i></b> , CREDO, 2000 <a href="http://www.credo.incampbellriver.com">www.credo.incampbellriver.com</a>	18
15	<b><i>Regional Economic Analysis: Vancouver Island/Coast Economic Region, Final Report</i></b> , Vann Struth Consulting Group and Eric Vance and Associates, September 2003	19
16	<b><i>Rivercorp Pocket Guide 2005, Campbell River</i></b> , Rivercorp, 2005	20
17	<b><i>Sayward Community Directory</i></b> , Sayward Futures Society, 2002	20
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21	<b>Turning Point</b> , District of Campbell River Task Force on Municipal Economic Development, October 27 <sup>th</sup> , 1998.	21
22	<b>Village of Cumberland Draft OCP</b> , Village of Cumberland, April 26, 2004	21
	<b>Agriculture (See Also 'General' for Agricultural Opportunities)</b>	21
23	<b>Comox Valley Agriculture Plan</b> , George Penfold, Gary Rolston, and Paul Guiton, November 25, 2002	21
24	<b>Fields and Forests 2000, Agroforestry Conference Evaluations and Summary Report</b> , John Watson, October 2000	22
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25	<b>The Baynes Sound Coastal Plan for Shellfish Aquaculture</b> , MSRM, December 2002	22
26	<b>North Island Straits Shellfish Aquaculture: Barriers and Constraints Study</b> , Edwin Blewett & Associates Inc. and Nelson Bros. Fisheries Ltd., April 2003	23
27	<b>A Preliminary Review and Assessment of First Nation Fisheries and Marine Resource Economic Development Opportunities in the British Columbia Coastal Zone</b> , The Native Brotherhood of B.C., August 2001	23
28	<b>Profile and Potential of the BC Shellfish Aquaculture Industry 2002</b> , Salmon, R. and B. Kingzett, 2002	24
29	<b>Shellfish Industry Economic Impact Analysis - New Marine Frontier Project Investment Attraction to Vancouver Island Phase 2 - Marketing Plan Development</b> , Salter, B., 2002	24
30	<b>State of the BC Seafood Industry Report</b> , David Egan, BC Seafood Summit 2001, May 2001	24
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32	<b>Small Hydro and Wood Waste Power Development Opportunities, Preliminary Feasibility and Market Analysis</b> , Willis Energy Services Ltd., 2001	25
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33	<b>Alliance Tribal Council's Forest Sector Opportunity Identification Plan</b> , The Alliance Tribal Council, 1998	25
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37	<b>Campbell River Land and Forest Manufacturing Renewal Program, Part 2 – Development Strategy</b> , R.G. Fuller & Associates, November 1999	27
38	<b>Comox Valley Forest Enterprise Forest Sector Strategy - Book 1 - Executive Summary - Strategies and Proposals</b> , The Group of Four & Associates (Westland Resource Group and Econ Consulting Group), 1997	27
39	<b>Comox Valley Forest Enterprise Forest Sector Strategy - Book 2 - Land Stream: Preliminary Feasibility Study</b> , Westland Resource Group and Quercus Consulting, 1997	28
40	<b>Comox Valley Forest Enterprise Forest Sector Strategy - Book 3 - Economic Stream - Activities and Outcome</b> , The Group of Four, 1997	28
41	<b>Comox Valley Forest Enterprise Implementation</b> , Coville Challenge, An Associate of The Group of Four, 1998	28
42	<b>Comox Valley Forest Enterprise Implementation - Step 2: Log Marketing Network &amp; Log Supermarket Study for the Comox Valley Area</b> , Schellinck, Michael and John G.A. Watson, 1999	29
43	<b>Develop a Proposal for a Community Forest License, Tahsis/Gold River and Zeballos</b> , Nootka Sound Development Corporation, 2001	29
44	<b>An Ecosystem-Based Assessment of Denman Island</b> , Silva Ecosystem Consultants Ltd., 1998	29
45	<b>First Nations of the Kwakwaka'wakw: Gaining Ground in the Forest Sector - An Economic Opportunities Study</b> , Shawn Morford, 1998	30
46	<b>Forest Sector Profile for Sayward (draft summary report)</b> , Caswell, John, 2002	30
47	<b>Forests and the Future of Work</b> , The Communities Institute, 1998	31
48	<b>A Forest Sector Based Economic Development Plan for North Vancouver Island</b> , Resource Systems Management International Inc., Patricia Hiscocks and Peter Drake & Associates, 1997	31
49	<b>Island Trust Forest Sector Profile: Main Report</b> , G.E. Bridges & Associates Inc. and Peter F. Walton & Associates Inc., 1998	31
50	<b>Island Trust Forest Sector Profile: Summary Report</b> , G.E. Bridges & Associates Inc. and Peter F. Walton & Associates Inc., 1998	32
51	<b>A Marketing Program Study as part of: The Comox Valley Forest Sector Strategy</b> , Galloway, W.T., 1998	32
52	<b>Nootka Sound Forest Sector Strategic Plan</b> , Synergy Management Group Ltd, 1998	33
53	<b>The Potential of Aboriginal Wood Carving in the B.C. Value-added Forest Products Sector</b> , Shawn Morford, 1998	33
54	<b>Proposal for a Community Forest Pilot Agreement</b> , Property and Economic Development Department, Campbell River, 1998	34

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57	<b>Coastal British Columbia Economic Gain Spatial Analysis, Tourism Sector Report</b> , The Economic Planning Group, January 2003.	34
58	<b>City of Courtenay Community Goals and City Policies on Arts and Culture</b> , Bernie Jones and Bob Yates, November 3, 2003	35
59	<b>Comox Valley Tourism Current Marketing Plan 2003/4</b> , Comox Valley Tourism, August 25, 2003	35
60	<b>Comox Valley Visitor Services Strategic Plan</b> , Lions Gate Consulting Inc. and Peak Solutions Consulting Inc., February 27, 2004	36
61	<b>First Nations Coastal Tourism Opportunity Strategy, Phase One Report</b> , Synergy Management Group Ltd., September 2002	36
62	<b>First Nations Coastal Tourism Strategy, Overview</b> , First Nations Coastal Tourism Steering Committee, March 2003	37
63	<b>Forest and Fisheries Tourism Opportunities Study for Portions of the Campbell River and Port McNeill Forest Districts</b> , Clover Point Cartographics, March 2000	37
64	<b>Forest Sector Tourism Plan</b> , Paradise Found Adventure Tours (Catherine Temple), 2002	38
65	<b>Marketing Action Plan for V.I.N.V.A. '98, Marketing the North Island to the Rest of the World</b> , Gail Meech Robillard and Kareen Graham, 1998	38
66	<b>Nootka Sound Forest Recreation and Tourism Opportunities Study</b> , Clover Point Cartographics Ltd., 1998	38
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67	<b>Comox Valley Airport Air Cargo Feasibility Study Phase 1</b> , Vancouver International Strategic Services, January 26, 1999	39
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69	<b>Comox Valley Airport 2003 – 2007 Business Plan</b> , Comox Valley Airport Commission, August 2002	39
70	<b>Comox Valley Airport Land Use Plan</b> , Stantec Consulting Ltd., March 2000	40
71	<b>Comox Valley Airport: Opportunities for Adjacent Lands</b> , InterVISTAS Consulting Inc., August 2004	40
72	<b>North Island Straits Community Harbour Enhancement Feasibility Study</b> , RG Fuller & Associates, June 2003	40
73	<b>Waterfront Lands Review, Harbour Depth Analysis &amp; Servicing Analysis</b> , R.G. Fuller & Associates Ltd., 2002	41

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### Executive Summary : Opportunities as Derived from Existing Studies

<b>Sector</b>	<b>Opportunity</b>	<b>Reference</b>
Cross Sector	Various sector opportunities are discussed in 'cross sector studies' that encompass most specific sectors mentioned below	2/5/6/7/9/10 /11/14/15 /17/20/21
	Construction – residential and commercial	15
Agriculture	Niche market foods/organic	15/18/23
	Agri-tourism	5/23
	Agro-forestry and agro-forestry centre	5/18/23/24
	Food manufacturing	6/11
	Animal production	11/18
	Farmer's/Fisherman's market	5/14/21
	Bottled water	7/20
Aquaculture & Fisheries	Minor commercial fleet expansion	15/27
	Value-added seafood processing	5/15/17/18/27
	Expansion of current aquaculture production	5/9/10/15/17/ 18
	Shellfish farming/First Nations ventures	2/9/10/17/18/ 20/25/27
	Fresh seafood sales	20
	Land-based aquaculture	23
	Commercial and recreation supplies and services	17/18
Energy and Mining	Offshore exploration	2/15
	Small scale power production (including wind, wave, run-of-river, biomass)	5/15/31/32/46
	Coalbed methane and coal fired power	5/15
	Dimension stone	7
	Fabricated metal manufacturing	11
Forestry	Small scale harvesting	11/15/33/45
	Small scale value-added manufacturing and custom sawmilling	2/5/7/11/14/15/ 17/21/33/45/46/ 52
	Community Forest Licenses	20/43/49/54
	Veneer slicing plant	20
	Botanical Forest Products - floral greenery, mushrooms, crafts, native plants and wild, natural food products	9/20/35/45/46
	Value-added Village/Co-operative	5/9/18/41/46/ 52
	Boat and Canoe Building School/boat building	9/49
	Prefab house, stair and handrail manufacturing	35/46
	Log and Timber frame houses	35/46/49
	Furniture – solid wood and ready-to-assemble	35/46
	Flooring – solid wood strip and plank	35/46
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<b>Sector</b>	<b>Opportunity</b>	<b>Reference</b>
	Log Yard/handling/storage	10/40
	Other specialty wood products	35/46/49/53/55
	Relocation of secondary manufacturing in Campbell River to develop a colony	34/36/37
	Woodlot Co-operative	41
	Primary sawmilling	45
	First Nations Joint Ventures	20/33/45/52
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Services	Nursing and Residential care	11/15/16
	Retail and Wholesale	7/11/15/22
	Retirement Living	6/7/15
Technology	Information and Data Processing Services	6/7/15
	High Technology	7/15/16
	Motion Picture and Sound Recording	11
Tourism and Recreation	Destination Resorts/ Sportfishing Lodges/ High End	2/5/15/20/52/57/61/63/66
	Gateway to Nootka Sound	7
	Heritage/Cultural (Native), Tourism events and attractions catering to ecotourists and cultural tourists, Education and Natural History	7/9/57/61/63/66
	Wildlife Viewing & Ecotourism	7/15/17/18/45/52/57/61/63/64/66
	Marine-related tourism – boat havens and public docks	10/61
	Cruise Ship visits and tourism events	15/17/61/57/63
	Hardened Campsites	61/63
	Boat Cruising	57/61/63
	Accommodation & restaurants	17/18/61
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	Staging	20/61
	Scuba Diving	52/61/64/66
	Saltwater Fishing - Guided Fishing	7/61
	Fresh Water Fishing	7/61/63/64
	Trail Building – continuation of the West Coast Trail, Trails on Nootka Island	7/52/61/63
	Joint Ventures with First Nations	20/27/45/52/61
	Land Adventures – Caving/hiking/biking	52/64/66
	Highway Visitor Information Centre and Kiosks	60
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	Motorized Adventures	61/63/66
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<b>Sector</b>	<b>Opportunity</b>	<b>Reference</b>
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## Annotated Bibliography of Studies that Reference Comox-Strathcona

### General

#### **1. *A Blueprint for Courtenay, OCP, City of Courtenay, 2004***

This Official Community Plan (OCP) is a statement of the City's long term vision of the community for the future. It establishes a strategy through policies that guide Council in their decision-making role. This includes economic, environmental, social and cultural policies in addition to land use patterns, servicing and transportation. It is an important reference for residents, businesses, community organizations and other levels of government.

It sets the direction for future locations of commerce, recreation, institutional and residential uses. The planning horizon is 5 years in the short term and 15 to 20 years for longer term considerations. The City of Courtenay was incorporated in 1915 with a population of 700 and has grown to include an area of 2,517 hectares (6,219 acres) with a population of 20,340 (2003 estimate). It is the largest municipality of the Comox Valley.

The existing OCP was adopted in 1994 and has been amended 55 times during which the community experienced the following significant changes:

- opening of the Inland Island Highway and completion of the Comox Valley Parkway to 29<sup>th</sup> Street (1999);
- Westjet flights into Comox Valley from Alberta (2001) and new airport terminal (2004);
- opening of Inland Island Highway to Campbell River in September 2001;
- expansion of commercial land base with addition of Anfield Retail Centre at Cliffe Avenue and Anfield Road, Safeway Retail Centre at Cliffe Avenue and 17<sup>th</sup> Street (2003) and Home Depot on Lerwick Road (2003);
- completion of Courtenay Middle School (opened September 2001) and additions to Puntledge Elementary, Glacier View Elementary, Valley View Elementary and Lake Trail Junior Secondary. Nine schools now within City boundaries plus North Island College;
- boundary extensions of over 1000 hectares;
- completion of civic projects which included the Library and Firehall, renovation of former Post Office into Museum and ownership of Native Sons Hall. The City has also commenced the renovation of the Old Fire Hall into an Arts Gallery and the renovation of City Hall and is working to complete Simms Millennium Park. All of these projects are within the downtown core of the City.

#### **2. *Campbell River, Bridging the Gaps, Rivercorp, 2004***

The District of Campbell River approved a five-year plan on April 10<sup>th</sup>, 2001 along with a contribution agreement with Rivercorp. This study represents year three of this commitment. This is the annual Economic Development Operating plan for 2004. The report includes 1) Operating Plan 2003 Progress Summary, 2) Strategic Context, 3) Operating Details for Rivercorp, 4) Operating Plan Details for Film Development by INFilm for Campbell River, 5)

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## **Comox Strathcona Regional District**

Operating Details for Tourism Development for Campbell River by Tourism NCI, and 6) 2003 Notes to the Operating Plan Submission.

### **2a. *Campbell River Economic Condition*, Campbell River EDC Rivercorp, February 2005**

This report highlights the economic environment in the District of Campbell River including recent changes and occurrences since approximately 2000. It reviews all industry sectors and their employment trends. It also provides a summary of The Financial Post's annual overview of Canadian Demographics by market area in respect to the Comox-Strathcona Regional District and a review of the Economic Dependencies published by Garry Horne. The Campbell River and North Island economy used to be one that was predictable and founded on a boom-bust basis. Growth in Technology and the immediate effects of world events has changed the nature of the socio-economic environment. Environmental scanning is a technique that must be maintained twice annually as events require. As such, since it is a scan, it does not discuss new opportunities that require further investigation.

### **3. *Campbell River Targeted Economic Development Marketing and Communications Strategy, 2005*, Rivercorp, 2005**

This is a brief five-page document revising the 2004 Marketing and Communications Plan providing direction for 2005. It is part of the current economic development strategy. It includes an objective and goals and tactics. The goals and tactics list a low cost guerilla approach to sales, service and contacts, and facilitate job creation through the effective communication internally and externally to Campbell River.

### **4. *Central Coast Land and Coast Resource Management Plan*, March 2001**

The CCLCRMP is an extensive report developed by the government and planning table related to this process. This plan largely reflects the consensus reached by process participants on selected land and coastal resource management direction and accepted by government for the Central Coast. It also provides direction for further coastal planning to be undertaken at a more detailed level in priority areas. Approved portions of this document assist government agencies, the public, and stakeholder groups by providing a concise guide to future management and planning of coastal zone resources. This report, which is a higher level planning document, addresses Management Intent, Objectives and Strategies, in addition to issues, for the Central Coast area in the following areas: First Nations Cultural Heritage; Land and Coast Tenures; Energy and Minerals; Recreation and Tourism; Environmental Quality; Marine Protected Areas; Coastal and Marine Biodiversity Conservation; Coastal Fishery and Marine Plant Management; Marine Transportation and Navigation; and, Future Integrated Coastal Planning. The only part of the Central Coast area that is contained in the Comox-Strathcona Regional District is part of the mainland portion and various islands. None of Vancouver Island is included.

No particular opportunities are highlighted in this report although all sectors are covered where relevant. Detailed strategies around First Nation issues are covered for each area. First

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Nations addressed in this report include: 13 First Nations represented by the Joint Councils of the Kwakiutl District Council, Musgamagw Tsawataineuk Tribal Council and the Tlowitsis Nation whose traditional territories are collectively identified as the South Plan Area; in the north Plan Area the Heiltsuk, Oweekeno and Nuxalk Nations sat at the planning table. The Kitasoo/Xaixais and the Gitga'at (Hartley Bay Band) First Nations, whose traditional territory includes a small portion of the northern Plan Area, decided not to participate.

### **5. *Comox Valley Economic Sector Profiles – Final Report, Crunch Analytics, November 2002***

This report profiles the major economic sectors in the Comox Valley economy. Each profile includes a statistical overview showing the labour force distribution in that industry as of the last Statistics Canada Census in 1996, as well as a general overview of the industry in the Comox Valley and, where appropriate, a discussion of important trends at the provincial or global level. The profiles conclude with a brief discussion of the industry's importance to the Comox Valley economy. The 18 industries that are profiled are representative of the dominant areas of economic activity in the Comox Valley and include: Agriculture and Food; Agroforestry; Aquaculture; Business Services; Communications/Utilities; Construction; Film Industry; Finance, Insurance, Real Estate (FIRE); Fishing Industry; Forest Industry; High Technology; Manufacturing; Mining and Oil & Gas; Public Sector; Retail Trade; Tourism; Transportation; and, Wholesale Trade. These industry profiles can also be used to provide information to those interested in learning more about economic sectors in the Comox Valley, including potential investors. They may also be used by individuals working in the economic development field in the Comox Valley to further their understanding of the local economy.

### **6. *Comox Valley Economic Development Strategy, Phase 1, Vann Struth Consulting Group, November 4, 2004***

This report is the first phase in a new Comox Valley Economic Development Strategy. The focus of Phase I is research and analysis of the Comox Valley economy, with a particular emphasis on identifying industries that are the Valley's best investment attraction targets. In addition, the final Phase I document incorporates updated versions of several prior research and analysis documents so as to provide a comprehensive overview of the economic situation in the Comox Valley. The five key objectives of this phase of the strategy are: Trends analysis; Review of original Comox Valley economic development strategy; Economic base analysis; Sector profiles update; and, Target industry evaluation. For the purposes of benchmarking, the Comox Valley is treated as a regional district and compared to the "rest of RDCS" and the other seven regional districts in Vancouver Island/Coast. The trends and benchmarking analysis is an extension of work done for the Vancouver Island Economic Developers Association (VIEDA) in 2003 that analyzed the entire Vancouver Island/Coast region.

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### **7. *Economic Development Strategy Update for the Village of Gold River,* Westland Resource Group et al., 1999**

The purpose of this study is to develop an economic development strategy for the Village of Gold River following the closure of the Bowater pulp mill and the lost jobs of 380 employees with approximately 280 residing in Gold River. The workers and their families represent approximately half of the Village's 1996 population of approximately 2,041. The report includes: (1) an overview of the economic situation; (2) a list of potential opportunities and an implementation plan; and (3) some general observations and conclusions. Specific opportunities are identified in the following areas of activity: tourism; small business development; natural resources; arts, crafts, and cultural resources; retirement/ seniors; industry/ industrial lands; mariculture; forestry value added; and services and infrastructure (e.g. hockey academy and marketing strategy for the arena and the pool).

### **8. *Final Report FRBC Initiative No. 6, Community Commitment,* Sayward Futures Society, 2002**

The purpose of this project was to focus on economic developments in the community of Sayward by highlighting existing businesses and instilling a sense of pride amongst local residents. Three newsletters were produced, with the third one explaining the purpose and goals of the initiatives undertaken under Forest Renewal BC funding. This report includes a community calendar, a copy of the three newsletters and a community directory. The community directory is entered as a separate item in this database.

### **9. *Kyuquot Region Forest Sector Strategic Plan,* Synergy Management Group Ltd., 1998**

The purpose of this study is to develop a strategic plan for the Kyuquot region. Kyuquot is an area of protected waters situated 130 km north of Tofino on Vancouver Island's northwestern coast. It includes a series of islands clustered around the main reserve of Houpsitas. The area includes the village of Kyuquot due north of Nootka Sound (the Nootka Sound region includes the communities of Zeballos, Tahsis and Gold River). The report includes the consultant's recommendations, community and industry profiles and interview research and findings. The report summarizes various opportunities for development in five activity areas as follows: (1) forestry; (2) forestry tourism; (3) aquaculture and fisheries; (4) botanical forest products; and (5) integrating initiatives into the Nootka Sound Forest Sector Strategic Plan

### **10. *The Kyuquot Sound Coastal Plan,* MSRM, Draft March 17<sup>th</sup>, 2003**

A priority of the Ministry of Sustainable Resource Management (MSRM) is to use coastal planning to enhance sustainable economic development opportunities of coastal communities (including First Nations communities) while maintaining environmental values. Through its coastal plans, the Ministry of Sustainable Resource Management (MSRM) identifies development opportunities and provides land management recommendations that foster

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economic development and environmental protection. These outcomes benefit coastal communities and the province. The Ka:'yu:'k't'h and Che:k'tles7et'h' First Nations have used the Kyuquot Sound area for centuries and the use and health of its resources remain vital to their cultural and economic wellbeing. This Plan attempts to respect and accommodate these uses, while reinforcing their participation in economic activities.

The Kyuquot Sound Coastal Plan provides the basis for coastal development on an environmentally sustainable basis. This Plan is consistent with the MSRM governance principles for sustainability. This Plan provides recommendations for acceptable uses in the foreshore and nearshore, which is under provincial jurisdiction. These recommendations address a range of tenure programs that are administered by Land and Water British Columbia Incorporated (LWBC). The Plan also addresses recreation and conservation values that should be reserved or limited with respect to tenure opportunities. This Plan does not make recommendations regarding use of private land, federal land, or Indian Reserves.

### ***11. Local Economic Analysis: Campbell River Market Region, Draft Report, Rivercorp, MMK Consulting & Vann Struth Consulting Group, March 2004***

The purpose of this report is to analyse the major influences on the local Campbell River economy. It reviews how the Campbell River Market has performed in the last five years in the eyes of the Financial Post Canadian Demographics Reports as well as how its economy has performed since 1991 and where it ranks regionally. The current activity level expected in 2004 of the region and the relative expectations for economic development from a Regional District perspective are also investigated. As part of the target analysis, four levels of analysis were undertaken. Finally a SWOT Analysis provides a proposed framework for competitive assessment.

### ***12. North Island Straits Economic Opportunities Marketing Plan, Phase 1: Identification of Opportunities, Daystar Marketing, May 2003***

This report has two goals: to identify industries and projects that have the potential to create jobs and economic diversity for the North Island region; and, to develop a marketing plan to recruit targeted new investment into the region in one of the most promising project areas. The North Island Straits study area includes only the most northern portion of the Comox-Strathcona Regional District, just barely taking in a portion of the mainland. Its relevance to this review is limited. However, criteria were developed with which to rank the projects and provide a shortlist for further investigation. The following industries were evaluated for potential investment attraction: non-tourism industries – renewable energy, salmon aquaculture, shellfish aquaculture, timber related forest products, non-timber forest products, and airline service expansion; tourism related industries including cultural tourism, ecotourism, fishing lodges, pocket cruises, destination resorts and Mount Cain; and, First Nations projects. More detailed investigation is suggested for a Destination Resort Development and Shellfish Aquaculture. Business development with First Nations is recommended as essential.

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### **13. *North Island Straits Integrated Coastal Plan*, Ministry of Sustainable Resource Management, December 2002**

The NIS Coastal Plan provides recommendations for acceptable uses in the foreshore and nearshore, which is under provincial government jurisdiction. These recommendations address a range of tenure programs that are administered by Land and Water British Columbia Incorporated (LWBC). The Plan also addresses recreation and conservation values that should be reserved or withdrawn from tenure opportunities. In some areas, the Plan also contains recommendations for resolution of issues concerning the interaction of fisheries, public recreation, navigation and other activities that are not administered by the province.

The NIS is divided up into 66 units with each unit addressed for: Physical Traits; Management Emphasis; Descriptions and Intent; Issues and Concerns; Unit Attributes; Current Uses and Activities; Acceptable Uses and Activities; and, Management Provisions. Further investigation into units of interest is ideally obtained from the original document.

The North Island Straits (NIS) Plan Area includes the foreshore and nearshore areas of Vancouver Island, the mainland coast and the associated islands and islets from Port Neville in Johnstone Strait to Cape Caution in the Queen Charlotte Strait. It extends approximately 138 km from east to west, encompassing some 343,000 ha of foreshore and nearshore.

The NIS coastal Plan Area contains a local population of 13,100 residents. The largest communities are Port Hardy and Port McNeill on Vancouver Island's northeast coast. The Plan Area lies within the boundaries of the Regional District of Mount Waddington (RDMW) taking in only a very small portion of the Comox-Strathcona Regional District.

### **14. *Outlook, The Faces of Forum '98, Forging the Economic Direction of Campbell River's Future*, CREDO, 2000 [www.credo.incampbellriver.com](http://www.credo.incampbellriver.com)**

This website summarizes priorities, directions and outcomes that resulted after two forums: one in 1998 and a follow-up forum in 2000. Forum 2000, March 27 – 31, 2000, brought together the groups of the region to talk about economic development in Campbell River. Four different industry groups met over four days to mark progress, set new objectives, and take steps towards setting action plans for success. The groups make up the Campbell River Economic Development Organizations, or CREDO, which is an informal alliance of organizations working together to build the economy of Campbell River. The top 16 priorities set at Forum '98, some of which have been achieved, some in progress and others were brought forward to Forum 2000 include:

1. Completion of the Inland Island Highway to Four Lanes
2. Active Marketing Campaign for Campbell River Image
3. Better Coordination Between Economic Development Groups
4. Deep Water Moorage Facility
5. Secondary Wood Manufacturing Opportunities
6. Downtown Fish/Farm Market
7. Promote Campbell River as a Retirement Community
8. Improve Recreational Boating Facilities
9. Improve Sportfishing Opportunities

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10. Lift Aquaculture Moratorium
11. Exploit Hi-Tech Opportunities
12. Preserve Community's Waterfront
13. Fibre Optics Opportunities
14. Expand Industrial Land Base
15. Market Campbell River Film Industry
16. Encourage Aboriginal Economic Development Participation

The results from the Forum 2000 are included on the site along with position papers for each day. These results summarize the events of the day and list the key topics that were then ranked by the participants. The following topics were covered;- harvest industries; production and manufacturing industries; retails, service and commercial industries; creative and knowledge-based industries; and, a summary of the previous days. The results are clear cut strategies with action plans and follow-up items.

### ***15. Regional Economic Analysis: Vancouver Island/Coast Economic Region, Final Report, Vann Struth Consulting Group and Eric Vance and Associates, September 2003***

This report provides a comprehensive review of economic trends and changes in the regional economy since the mid-1980s, including an analysis of the key factors driving economic change in the region and an examination of opportunities for economic growth. The Vancouver Island/Coast Economic Region includes the regional districts of: Capital, Cowichan Valley, Alberni-Clayoquot, Nanaimo, Comox-Strathcona, Mount Waddington, Powell River, and Central Coast. The report does not address action plans nor does it provide distinct strategies.

The study profiles 16 industries with each profile including an overall description of the industry, identification of key trends and competitive issues, and a discussion of the drivers of growth, both internal and external, that will determine the industry's future prospects in the region. The 16 industries include: Forestry; Mining and Oil & Gas; Fishing; Aquaculture; Agriculture and Food; Construction; General Manufacturing; Utilities; Tourism; High Technology; Transportation and Warehousing; Retail and Wholesale Trade; Business and Professional Services; Retirement Living; Public Sector; and, Film.

Industries with the best prospects for growth in the next five years in the region include tourism, high technology (mostly limited to Greater Victoria and other larger centres), agriculture, and aquaculture and fish processing. Opportunities may also exist in specific parts of the region for new manufacturing or mining operations, and substantial construction activity will continue in response to growing populations and new business investments. The outlook for the forest industry is cloudy. Smaller-scale processing and value-added manufacturing also have the potential to grow as a result of the reallocation of timber cutting rights to small companies, community forest corporations and First Nations.

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### **16. *Rivercorp Pocket Guide 2005, Campbell River, Rivercorp, 2005***

This small two page pocket guide provides contacts, the role of Rivercorp as it relates to Campbell River economic development, target markets, strategies, marketing channels and projects worked on in 2004 and underway in 2005.

### **17. *Sayward Community Directory, Sayward Futures Society, 2002***

This Community Directory lists services, community groups and businesses based in the Village of Sayward. The directory was developed as part of a broader economic development project to highlight existing businesses and instil a sense of pride amongst local residents. The directory lists 92 businesses in a variety of areas including accommodation, food, convenience stores, retail, industry, professional services and other services.

### **18. *Sayward Community Profile, Sayward Futures Society, 2002***

The purpose of this project is to develop a community profile for the Village of Sayward on Vancouver Island. The report includes an overview of the following: (1) history and market area; (2) location; (3) climate; (4) transportation; (5) community services; (6) housing, population and labour force; (7) forest sector, including development opportunities such as the proposed value added "wood village" concept; (8) aquaculture and commercial fishing sector; (9) agriculture; (10) tourism; and (11) industrial land currently available for lease or purchase.

### **19. *Targeted Economic Development Strategy for Campbell River, Rivercorp, July 2004***

This is a brief two-page document revising the 2004 Operating Plan providing direction for 2005. It is part of the current economic development strategy. It includes an objective and goals and tactics. The goals and tactics uses a "best practices" modeled approach to sales, service and contacts, facilitating job creation through the retention and expansion of existing business and the attraction of new business to Campbell River.

### **20. *Tlowitsis Nation, Campbell River, BC, Economic Development Roadmap, Synergy Management Group Ltd., March 2003***

This is a well-detailed study closely addressing economic opportunities in relevant sectors for the Tlowitsis Nation. The Tlowitsis are mostly based out of Campbell River although some of their membership reside in the Regional District of Mount Waddington and some of their traditional land is located in that area as well. Opportunities covered in detail include: Adam & Eve Rivers, Shellfish Farming, Fresh Seafood Sales, Karkulees, Forestry and Forest License, Veneer Slicing Plant, Botanical Forest Products, and Bottled Water. The report reviews the Band's strengths and weaknesses and addresses how to overcome barriers to success and details around joint venturing. Feasibility of identified opportunities is also addressed.

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### **21. *Turning Point*, District of Campbell River Task Force on Municipal Economic Development, October 27<sup>th</sup>, 1998**

The primary purpose of the Task Force was to examine the municipal role in community economic development. The Task Force was charged with determining who should be the primary economic development service provider for Campbell River and, what was to be the municipal role in economic development. Its purpose included the identification of prospective partners for the delivery of economic development services within the District, and review the strategies for business retention, expansion and recruitment in all sectors of the Campbell River economy. This report makes recommendations concerning areas for immediate action, and those that require further exploration, provides a series of documents for future reference and a listing of potential follow-up items that a Task Force could perform in the future in order to complete its mandate. The main sections of the report include: 1) Overview; 2) Role of the Municipality; 3) Coordination Structure; and, 4) Strategic Framework.

### **22. *Village of Cumberland Draft OCP*, Village of Cumberland, April 26, 2004**

The Official Community Plan (OCP) is a document adopted by bylaw as a policy guide for future land use and community development. The Plan is the guiding statement of community values that have been developed with the participation and guidance of the Village residents. The OCP defines the character of the desired community and the related Goals, Objectives, Policies, Principals, and Performance Standards which are to be employed to guide Council, Village residents, the development community and government agencies in managing and directing the development of the Village.

## **Agriculture**

### **23. *Comox Valley Agriculture Plan*, George Penfold, Gary Rolston, and Paul Guiton, November 25, 2002**

In February 2001, the Regional District of Comox-Strathcona (RDSCS) formally initiated the process of preparing an Agricultural Plan for the Comox Valley. The Planning area includes Electoral Areas A, B, C and part of Electoral Area D (The Oyster River Research Farm), of the Regional District of Comox-Strathcona. The purpose of the plan is to further the development of socially, culturally, environmentally and economically sustainable farming. The four goals of the plan are: to identify the current agricultural situation in the Comox Valley; to create more educated and self-aware governments and public in regards to the agricultural food system in the Valley; to identify relationships between agricultural and other land uses for the purpose of promoting healthy relationships between agriculture and its neighbours; and, to write an agricultural plan that furthers the development of socially/culturally, environmentally and economically sustainable farming in the plan area.

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### **24. *Fields and Forests 2000, Agroforestry Conference Evaluations and Summary Report*, John Watson, October 2000**

Fields and Forests 2000 was held to bring together community members into an Agroforestry partnership. This partnership was to hold an in-depth conference & tradeshow on the economic potential of Agroforestry as a means to augment income and create employment in our agriculture and forest sectors. All members of the steering committee have an interest in seeing that these landowners, be they farmers or foresters, have the tools to create new wealth and employment opportunities in the communities. Five potential outcomes that can be used to measurable deliverables were identified:

- Development of a Ministry Approved “short course” in agroforestry where conference participants with suitable land holdings will be able to obtain extensive training in applying agroforestry principals to their existing operations;
- Development of an Island-wide Agroforestry informational network;
- Agroforestry manual;
- North Island College, Malaspina College and the BC Small Woodlands program have collaborated to provide extension services to small landowners with forest resources on their properties;
- Support the concept of a centre for agroforestry research, training, extension, communication, and marketing. This centre would ideally be located in the Comox Valley region. The potential of locating the centre at the Oyster River Research farm was discussed.

## **Aquaculture and Fisheries**

### **25. *The Baynes Sound Coastal Plan for Shellfish Aquaculture*, MSRM, December 2002**

This is a Provincial Plan designed to provide guidance for decisions regarding land tenure applications and to identify and address issues with the existing industry operation. The Province seeks to balance social and environmental issues and the needs of other resource users on the coast and at the same time provide economic opportunities for coastal communities. The purpose of the Baynes Sound Coastal Plan is to employ a transparent and science based approach to:

- Identify whether or not any additional areas are suitable for further shellfish aquaculture development;
- Address concerns of upland residents, fishery resource users and the aquaculture industry by documenting problem areas and developing workable industry management tools to apply where required;
- Ensure that, if any shellfish aquaculture expansion does take place, it does so in an environmentally sustainable fashion.

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The study area for the Coastal Plan includes all near-shore waters, shoreline and inter-tidal areas within Baynes Sound including Comox Harbour to the high tide mark.

### **26. *North Island Straits Shellfish Aquaculture: Barriers and Constraints Study*, Edwin Blewett & Associates Inc. and Nelson Bros. Fisheries Ltd., April 2003**

The Barriers and Constraints Study was initiated so that a perceived opportunity for the North Island Straits Study Area – shellfish aquaculture development – could be objectively analyzed and evaluated. This report addresses both a production-oriented approach and a marketing approach for the development of the Shellfish Aquaculture industry. Most of the detail is focussed on the production-oriented approach – based on the idea of producing the product and then finding the market. The market-driven approach is addressed more generally but is based on the idea of determining what the market is demanding and then building the industry based on that need.

The study area covered is within the Regional District of Mount Waddington and takes in a very small portion of the northern mainland section of the Comox-Strathcona Regional District. Opportunities are addressed under the following headings: Biophysical Attributes; Regulatory; Financial/Capital; Human Resources – Entrepreneurs, Farm Operations Crew, Training; Shellfish Aquaculture Operations; Transportation; and, Processing/Marketing. The opportunities at times look like strategies and at times are more specific.

The study concludes by noting that the NIS Region possesses the physical and human resource attributes to become, over time and with appropriate investment and training, a legitimate producer of shellfish aquaculture products. To proceed with large scale shellfish aquaculture development without prior consideration of market factors would be dangerous.

### **27. *A Preliminary Review and Assessment of First Nation Fisheries and Marine Resource Economic Development Opportunities in the British Columbia Coastal Zone*, The Native Brotherhood of B.C., August 2001**

The purpose of this report is to provide a preliminary review and assessment of First Nation fisheries and marine resource economic development opportunities in the British Columbia coastal zone, and relate this assessment to the NBBC facilitated initiative. This NBBC Report provides a First Nations, government and non-Native perspective regarding a general goal of optimizing the amount and mix of benefits to First Nations from BC coastal zone fisheries and marine resource through a business focused entrepreneurial approach. Based upon historic and current data, an initial overview assessment of a range of potential economic opportunities for optimizing the amount and mix of First Nation benefits is provided specifically with regard to: the commercial salmon fishery; herring; ground fish; shellfish; the recreational fishery/tourism industry and other marine resources. This Discussion Paper also provides an overview assessment of the BC coastal zone fisheries and marine resource uses for all interested parties which presents an overview NBBC policy context with regard to current status, the need of an integrated policy approach, policy areas for consideration, policy guiding principles and linkage to treaty and interim measures.

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### **28. *Profile and Potential of the BC Shellfish Aquaculture Industry 2002*, Salmon, R. and B. Kingzett, 2002**

Kingzett Professional Services was contracted by the Vancouver Island Economic Developers Association (VIEDA) in the spring of 2002 to conduct a literature review of existing documents to develop a comprehensive profile of the current shellfish aquaculture industry in BC. The goal of this profile is to provide a clear picture of what the industry looks like today, how it is structured, what the potential is for future growth, as well as what barriers are currently impacting expansion and competitiveness. This activity was carried out using all existing sources of currently available statistical data, information and literature (qualitative and quantitative) to compile an industry synopsis document.

### **29. *Shellfish Industry Economic Impact Analysis - New Marine Frontier Project Investment Attraction to Vancouver Island Phase 2 - Marketing Plan Development*, Salter, B., 2002**

The shellfish industry on Vancouver Island currently accounts for \$66 million in economic output and 956 total jobs (direct, indirect and induced). Concentration of the industry occurs in Baynes Sound area, roughly Comox to Nanaimo. Much of the economic benefit and impact associated with the industry remains on Vancouver Island and in local communities. Industry technological developments have been local, and capital equipment and services associated with the industry are locally made or purchased. Analysis shows that 78 cents of every dollar spent in direct industry purchases remain in the local economy. The industry has great potential to grow in the short-term. The shellfish industry has set goals for growth that are considered realistic, and have the support of provincial and federal government. These goals would result in economic expansion of the industry to \$206 million over a 5-year period, resulting in an industry with 3700 jobs, mostly in rural communities. All regions of Vancouver Island would benefit from the growth ranging from 100% increase and creating 250 jobs in the Baynes Sound area to a 900% increase and create 530 jobs on the West and North Coasts of Vancouver Island.

### **30. *State of the BC Seafood Industry Report*, David Egan, BC Seafood Summit 2001, May 2001**

This report has been prepared by PricewaterhouseCoopers as a background paper for the *BC Seafood Summit 2001*. The profile was developed from published sources and from consultations with BC Seafood Alliance members. Staff of BC Fisheries and BC STATS in its preparation provided special assistance with its' preparation. The report profiles the recent economic performance of the commercial fisheries and aquaculture sectors of British Columbia. It focuses on significant changes during the last decade and describes opportunities and challenges. The analysis includes processing but excludes the Aboriginal food fishery and the recreational fisheries. By way of context, world fisheries production and trends are also described. All production and wholesale value figures for 2000 are preliminary.

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### Energy and Mining

#### ***31. Executive Report on the Green Energy Study For BC, Phase 1: Vancouver Island, Power Supply Engineering, July 2001***

The Phase 1, Vancouver Island study presents the results of the pre-feasibility investigations for the B.C. Green Energy Study. It supports the decision to proceed with more detailed investigations and the development of the Green Energy Demonstration Projects on Vancouver Island (VI). The objectives of the pre-feasibility study were to: identify a number of viable alternative green energy resources that could provide information for future energy planning and support decision-making around future generation options for VI (although it is not a comprehensive inventory of potential green energy resources on VI); and, to provide specific input for the development of a 20 MW demonstration project for green energy on VI. The technologies examined included energy derived from wind, small hydro, landfill gas, municipal solid waste, woodwaste, wave, and tidal barrage. Resource Smart options (additions to BC Hydro existing powerplants) and energy storage by means of low impact closed-circuit hydro electric pumped storage were also examined. Results indicate that the Vancouver Island green energy resources do not provide the necessary dependable capacity to meet the winter peak demand without some storage, back-up or firm supply option to support the green resources. Low impact, closed circuit pumped storage was investigated as a potential storage option to provide dependable capacity supplementing green resources. Vancouver Island green resources could provide significant energy on an average basis, with the balance of energy provided by the existing 500 kV transmission system.

#### ***32. Small Hydro and Wood Waste Power Development Opportunities, Preliminary Feasibility and Market Analysis, Willis Energy Services Ltd., 2001***

This study is a preliminary feasibility analysis of a potential run-of-river small hydropower generation project on McKelvie Creek and a wood-waste generation facility near the Tahsis Doman hemlock mill. The report includes a review of the McKelvie Creek small hydro development project; a review of two other small potential hydropower generation projects in the area; and an assessment of the wood waste power project. The report provides estimates of capital investments, labour impacts and annual revenues that could potentially be associated with each development. The report includes an action plan to help promote and facilitate the development of these projects.

### Forestry

#### ***33. Alliance Tribal Council's Forest Sector Opportunity Identification Plan, The Alliance Tribal Council, 1998***

The objective of this forest sector opportunity identification plan is to increase First Nation's involvement in the forest sector for the member First Nations of the Alliance Tribal Council (ATC). The report provides information on six of the eight member First Nations of the ATC

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including: Tsawwassen, Tsleil-Waututh, Sliammon, Homalco, Nanaimo, and Halalt First Nations. For each of these six First Nations, the report includes: a literature review; a natural resource community profile; a summary of community presentations made by existing First Nations forest-based businesses and others; and action plans. The plan focuses on opportunities that may exist in the existing resource base (on-Reserve and off-Reserve); historical uses within each territory; present human resource capacity; and potential resource developments. The areas of greatest interest are: ecotourism, value-added wood processing; forestry, and in particular silviculture and Geographic Information Systems Contracting (G.I.S.); Aboriginal tourism (gaming and traditional village site attraction and associated activities); botanical forest products (harvesting and processing); BC Parks and municipal parks management; and forest management through the acquisition of a Forest License.

### **34. *Campbell River Estuary Industrial Relocation Strategy*, R.G. Fuller & Associates Ltd., 1998**

The purpose of this study is to assess the opportunities to relocate the following operations: Campbell River mills, Anglo American Ocean Cedar, Algoma Cedar and Shake and DCD Pile and Dredge. The findings are summarized in three reports titled as follows: (1) Phase 1 - Status of Operations; (2) Phase 2 - Feasibility of Relocation; and (3) Phase 3 and Phase 4 Implementation Strategy and Communication Process. The report concludes that neither the economics of the mills involved nor the real estate economics of the land redevelopment support the relocation. The costs of relocating the mills exceed the owners' ability to pay and the additional costs of operating inland could result in the cedar mills being unprofitable. Finding suitable funding from sources other than the existing mill operators and property owners will be required to make the relocation financially viable.

### **35. *Campbell River Forest Sector Economic Development Strategy*, G.E. Bridges & Associates Inc., 1999**

The purpose of this study is to develop an economic development strategy for the Campbell River District forest sector. The plan includes a forest sector profile, a list of issues and opportunities and an implementation plan. The report identifies several structural issues that will need to be addressed in order to attract new forestry investment into the region. These include: cost related issues (stumpage, capital tax and regulation/Forest Practices Code), business certainty (land claims, labour issues and land use decisions), and industry setting/ market outlook. The report recommends undertaking the following strategies: (1) monitor and improve local access to timber supply; (2) assist in expanding the market for locally produced logs; (3) ensure marine access for logs and logging service companies; (4) encourage tree farm license holders to expand, modernize and locate in the District; (5) help reduce costs for existing shake and shingle mills; (6) encourage investments in secondary wood manufacturing and services (includes investments in a pressure treating facility, a prefab home business, the establishment of a dry kiln, a log home builder, a furniture manufacturing business and a plank & strip flooring business); and (7) be proactive in maintaining the health of the pulp and paper industry.

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### **36. *Campbell River Land and Forest Manufacturing Renewal Program, Part 1 – Forest Colony Sites and Data*, R.G. Fuller & Associates, November 1999**

Much of this report addresses land selection issues. The availability of suitable land in the Campbell River area is a key building block for developing sustainable forestry manufacturing. The purpose of this study was to provide the municipality, land owners and prospective investors with a number of snapshots on how sites could be developed and prepared as a colony. Water access or proximity to the watering and de-watering of logs remains a priority for this industry. From the original portfolio of lands, a shortlist was developed which resulted in the establishment of three focus areas addressed in Part II. This is a comprehensive audit of the characteristics and capabilities of serving as a base for a Forest Colony. The report covers: site selection criteria; site availability; property suitability evaluation; possible colony sites; client development; colony development options; and, property procurement activity.

### **37. *Campbell River Land and Forest Manufacturing Renewal Program, Part 2 – Development Strategy*, R.G. Fuller & Associates, November 1999**

The purpose of this study was to illustrate a focus on the three areas identified in Part I, in the form of a Development Strategy. It serves as a starting point for continued discussion between land owners and prospective investors. In order to determine the feasibility of primary breakdown investment to replace Campbell River Mills, a number of interviews with likely investors were carried out to determine their interest. The results serve as an indicator of potential. The three potential industrial sites selected for further consideration include: Menzies Bay; Willis Road; and, Airport East.

### **38. *Comox Valley Forest Enterprise Forest Sector Strategy - Book 1 - Executive Summary - Strategies and Proposals*, The Group of Four & Associates (Westland Resource Group and Econ Consulting Group), 1997**

The purpose of this project is to prepare a forest sector plan that will develop strategies to strengthen the forest based economy in the Comox Valley. One potential strategy being explored, involves development of an area around Pidgeon Lake Landfill as a possible industrial site for the purposes of a Value-Added Village and Forest Resource Centre. The forest sector plan is defined in two streams of activity, with forest planning being the Economic Stream, and the industrial land feasibility being the Land Stream. The forest sector plan includes three reports as follows: Book 1: Executive Summary - Strategies and Proposals; Book 2: Land Stream - Preliminary Feasibility Study; and Book 3: Economic Stream - Outcomes and Activities. The outcomes of the Land Stream are: to proceed with a detailed site analysis, a site development and a business plan for the proposed industrial lands. The outcomes of the Economic Stream are: (1) a plan to develop an infrastructure that will build a climate to support and sustain entrepreneurial activity in the region; (2) a plan to seek potential funding partners; (3) a timber supply profile; and (4) a very vital Focus Group has come forward who are interested in seeing this planning initiative blossom into a truly helpful vehicle that assists their own businesses and strengthens the whole sector.

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### **39. *Comox Valley Forest Enterprise Forest Sector Strategy - Book 2 - Land Stream: Preliminary Feasibility Study*, Westland Resource Group and Quercus Consulting, 1997**

This "Land Stream project" is part of a larger study to identify strategies to strengthen the forest-based economy in the Comox Valley. The forest sector plan includes three reports as follows: Book 1: Executive Summary - Strategies and Proposals; Book 2: Land Stream - Preliminary Feasibility Study; and Book 3: Economic Stream - Outcomes and Activities. The need for this feasibility study arose from previous planning processes, which identified a lack of serviced industrial land in the Comox Valley as an obstacle to economic diversification and job creation, particularly in the forestry sector. The Regional District of Comox Strathcona identified an area around the Pidgeon Lake Landfill as a possible industrial site for the purposes of a Value-Added Village and Forest Resource Centre. This Land Stream report includes: a site description and preliminary assessment; a land use policy framework; an overview of services; existing tenure; potential use; other planning considerations; and environmental considerations. The report recommends proceeding with a detailed site analysis, a site development and a business plan for the proposed industrial lands.

### **40. *Comox Valley Forest Enterprise Forest Sector Strategy - Book 3 - Economic Stream - Activities and Outcome*, The Group of Four, 1997**

This study is part of a larger study to identify strategies to strengthen the forest-based economy in the Comox Valley. The forest sector plan is defined in two streams of activity, with forest planning being the Economic Stream, and the industrial land feasibility being the Land Stream. The forest sector plan includes three reports as follows: Book 1: Executive Summary - Strategies and Proposals; Book 2: Land Stream - Preliminary Feasibility Study; and Book 3: Economic Stream - Outcomes and Activities. The outcomes of the Economic Stream are: (1) a plan to develop an infrastructure that will build a climate to support and sustain entrepreneurial activity in the region; (2) a plan to seek potential funding partners; (3) a timber supply profile; and (4) a very vital Focus Group has come forward who are interested in seeing this planning initiative blossom into a truly helpful vehicle that assists their own businesses and strengthens the whole sector.

### **41. *Comox Valley Forest Enterprise Implementation, Coville Challenge*, An Associate of The Group of Four, 1998**

This project represents Step One of the implementation phase of the Comox Valley Forest Sector Strategy. This brief report summarizes the activities undertaken to date. The report first reviews the progress to date on various on-going initiatives including: (1) a Forest Resource Center; (2) a proposed Value-Added Village and industrial land proposal; (3) a co-operative of woodlot licensees/ owners; (4) an outdoor/ adventure network of 8 business operators seeking cost efficiencies and increased market share through combined marketing and other efforts; (5) a directory of local forest sector resources; (6) a waste study for Comox Valley/ Campbell River; and (7) a marketing program study. The report refers to seven separate reports developed as

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part of this phase: (1) Report on Woodlot Cooperative (by John E. King); (2) The Upper Island Outdoor/ Adventure Network (by Coville Challenge); (3) Sources and Utilization of Wood Waste in the Comox Valley - Campbell River Area (by Econ Consulting Ltd.); (4) A Marketing Program Study (by W,T, Galloway); (5) Seven Steps to Your New Organization (by Digital Memories); (6) Marketing: A Crash Course (by Pacific Training Innovations); and (7) Comox Valley Forest Enterprise Forest Directory (by the Comox Valley Economic Development Society). The five latter documents are entered separately in the database.

### ***42. Comox Valley Forest Enterprise Implementation - Step 2: Log Marketing Network & Log Supermarket Study for the Comox Valley Area, Schellinck, Michael and John G.A. Watson, 1999***

This report assesses the feasibility of a Comox log sort yard (the Comox Valley Log Supermarket) and a Centralized Marketing Agency (the Log Marketing Network). The study followed the recommendations generated by the previously completed Forest Sector Strategy Plan. The report includes a review of various log yard projects in other B.C. locations including Vernon, Prince George, Revelstoke, 150 Mile House and other locations on Vancouver Island. The report also includes details on site location, timber supply profile, costs and benefits. The report concludes that there is a large potential for a log marketing co-op to be financially successful. The survey of potential log suppliers indicated that there is fibre that is currently usable by local value added manufacturers and that these manufacturers would be willing to pay more for quality custom sorted fibre than what local buyers currently offer. Financial estimates indicate that a community owned custom sort yard would be able to obtain a higher value per cubic meter for the yard users. An issue that needs to be considered is the location of the yard in relation to the main log supply. The report presents an action plan to implement the recommendations.

### ***43. Develop a Proposal for a Community Forest License, Tahsis/Gold River and Zeballos, Nootka Sound Development Corporation, 2001***

As part of this study, the Villages of Tahsis, Gold River and Zeballos will study the feasibility of operating a community-held forest license on parcels of land identified and approved by the Ministry of Forests for the purpose. If the license is shown to be feasible, the Villages intend to submit a proposal to the Ministry of Forest for a license. The funding for this study is intended to support the costs of the feasibility study and preparation of the subsequent proposal.

The FRBC database indicates that this was in progress at the time that FRBC ceased to be in operation. It is unknown if this study was completed.

### ***44. An Ecosystem-Based Assessment of Denman Island, Silva Ecosystem Consultants Ltd., 1998***

This project is part of the Denman Forestry Initiative whereby a collective of Denman Island residents are proposing to purchase 1,750 ha of private forest lands. An eco-system based

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assessment identifies the ecological components, structures, processes and flows that are required to maintain fully functioning ecosystems at all scales. This ecosystem-based assessment of Denman Island includes: a description of the geology and ecology of Denman Island; various eco-system-based assessment maps; a description of the forest inventory; and recommendations and conclusions. The project terms of reference changed during the project as a result of the Denman Island private lands changing ownership in July 1997. According to this report, "it became apparent that the lands had been sold to a group of owners who had limited interest in reselling the property, and that they intended to realize a return on their investment through a program of aggressive logging and subdivision." The report concludes that while the lands did not become community forest lands when it was first proposed, the Denman Island community should still endeavour to obtain ownership of the lands, regardless of the forest on those lands at the time.

### ***45. First Nations of the Kwakwaka'wakw: Gaining Ground in the Forest Sector - An Economic Opportunities Study, Shawn Morford, 1998***

The purpose of this project is to examine the potential of forestry sector involvement by the First Nations of the Kwakiutl District Council and Musgamagw Tsawataineuk Tribal Council on North Vancouver Island and the mainland coast. It examines the potential of seven types of opportunities as follows: (1) primary sawmilling; (2) value added manufacturing; (3) silviculture; (4) non-timber forest products; (5) harvesting (logging); (6) eco-tourism/ forest based recreation; and (7) watershed assessment and restoration. The report makes various recommendations that relate to the community process and infrastructure required to capitalize on the forest sector opportunities suggested in the report. The report also recommends that priority be given to businesses in non-timber products and eco-tourism.

### ***46. Forest Sector Profile for Sayward (draft summary report), Caswell, John, 2002***

The purpose of this project is to develop a profile and strategic plan for the forest sector in the Village of Sayward, a community located 75 km north of Campbell River on Vancouver Island. The report includes two major components, a demographic profile and a description of forest sector issues and opportunities. The Demographic Profile provides economic and demographic statistics as well as general information on the forest sector and other industries. The Forest Sector Issues and Opportunities Section provides information on timber supply opportunities (including community tenure, the Small Business Forest Enterprise Program, Woodlots, licensees' undercut, and salvage sales) as well as opportunities for timber processing. Opportunities for timber processing reviewed in the report include: (1) value-added wood village concept; (2) custom sawmilling and specialty wood drying; (3) furniture manufacturing; (4) solid wood strip and plank flooring; (5) prefabricated stair and handrail components; (6) window, sash and door; (7) log and timber frame; (8) specialty wood products; (9) wood waste products (including ACOS biomass ethanol refining technology and others); (10) pre-fab housing; and (11) shakes and shingles. The report also provides an overview of opportunities in non-timber forest activities such as recreation based forest activities and non-timber forest related products.

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### **47. *Forests and the Future of Work*, The Communities Institute, 1998**

The purpose of this project titled "Forests and The Future of Work" is to facilitate the communities' understanding of the transitions taking place in the Campbell River region forest economy. The principal objective of this project was to develop and document a "community model approach" to managing transition issues associated with changes in forest management practices, technologies and economics. The activities carried out for this project included: consultations with key community leaders; a public forum; group discussions; analysis of prior research and forest sector economic development initiatives; and the reporting of lessons learned through this process. The conclusions are organized along three themes, as described following: (1) Resistance to Change: Building Awareness Through Education - there is a growing need for more information that will raise awareness of transition issues and will point to new opportunities for meeting the challenges facing communities; (2) Leadership: Apply Alternative Community Consultation Strategies - there is a need to bridge the various economic development initiatives to ensure that the general public gains access to these plans and initiatives; and (3) Limited Resources: Building Community Based Economic Infrastructure - there is a need to invest in Community Economic Development (CED) infrastructure as people who are committed to their own professions cannot easily take time out to champion CED unless external support is put in place.

### **48. *A Forest Sector Based Economic Development Plan for North Vancouver Island*, Resource Systems Management International Inc., Patricia Hiscocks and Peter Drake & Associates, 1997**

The purpose of this project is to initiate and implement a forestry-based economic development strategy. The report includes: a situation analysis (i.e. a description of the population, the economy, the communities and the harvest profile); an analysis of opportunities and constraints; the region's workforce requirements; various transition and remedial strategies; an employment training strategy; and an implementation strategy. Key opportunities are identified in a number of areas including: forest products manufacturing/ value added; harvesting; silviculture; watershed restoration; resource inventory; tourism; and botanical forest products. Each opportunity is described in some detail with the report providing a brief profile of the industry/market niche, the current constraints and a list of implementation activities. The report includes a list of transition and remedial strategies; employment strategies; and implementation strategies. Job coefficients for selected value added mills are provided.

### **49. *Island Trust Forest Sector Profile: Main Report*, G.E. Bridges & Associates Inc. and Peter F. Walton & Associates Inc., 1998**

The purpose of this initiative is to prepare a comprehensive Forest Sector Profile that outlines the character of forest activities in the Islands Trust area. This includes the Islands of Bowen, Denman, Gabriola, Gambier, Hornby, Lasqueti, Mayne, North and South Pender, Saltspring, Saturna, Thetis, and Valdes. This report includes a review of the following: forestry perspectives for each of the Islands; forestry activity assessment; forest-based opportunities; and implementation plan. Some of the opportunities reviewed in the report include: community forest licenses; community woodlots; artisan, giftware and craft market; kiln drying; specialty sawing;

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timber frame and log homes; wooden boat building; and unique furniture design and manufacturing. The report includes an implementation plan with a number of recommendations as follows: (1) improve information on forest management practices; (2) improve Island forestry activity coordination; (3) support managed forest land expansion; (4) expand the Trust area web page to include Island artisan and crafts producers; (5) expand the use of community woodlots; (6) examine the potential for growing and using alder; (7) support changes to the Occupiers Liability Act in order to improve access to rural and forest areas for nature walking; (8) accommodate the use of portable sawmills; (9) develop an Islands Woodworkers Guild; (10) develop a woodworking/crafts/artisan exhibition series; (11) consider accommodating mixed residential and light industry zoning; and (12) investigate improved transportation services to the Islands. The report also includes specific action plans for each of the Islands. The same authors publish a summary report of the forest sector profile.

### ***50. Island Trust Forest Sector Profile: Summary Report, G.E. Bridges & Associates Inc. and Peter F. Walton & Associates Inc., 1998***

The purpose of this initiative is to prepare a comprehensive Forest Sector Profile that outlines the character of forest activities in the Islands Trust area. This includes the Islands of Bowen, Denman, Gabriola, Gambier, Hornby, Lasqueti, Mayne, North and South Pender, Saltspring, Saturna, Thetis, and Valdes. This summary report is derived from the main report, entitled Islands Trust Forest Sector Profile, which is entered separately in the database. This summary report includes a review of the land base, log harvest, forest based opportunities, value-added opportunities, and implementation plan. The key recommendations are summarized following: (1) improve information on forest management practices; (2) improve Island forestry activity coordination; (3) support managed forest land expansion; (4) expand the Trust area web page to include Island artisan and crafts producers; (5) expand the use of community woodlots; (6) examine the potential for growing and using alder; (7) support changes to the Occupiers Liability Act in order to improve access to rural and forest areas for nature walking; (8) accommodate the use of portable sawmills; (9) develop an Islands Woodworkers Guild; (10) develop a woodworking/crafts/artisan exhibition series; (11) consider accommodating mixed residential and light industry zoning; and (12) investigate improved transportation services to the Islands. The report also includes specific action plans for each of the Islands.

### ***51. A Marketing Program Study as part of: The Comox Valley Forest Sector Strategy, Galloway, W.T., 1998***

The objectives of this Marketing Program study are to: assess marketing needs; disseminate this information; provide a seminar and focus group to address these needs; and strengthen marketing efforts for various producers. This marketing program study is part of the Comox Valley Forest Enterprise Implementation plan resulting from the Forest Sector Strategy completed in 1997. The report includes the results of a random survey on marketing needs of forest-based operators based in the Comox Valley. The report also includes the results of a focus group of wood products companies operating in the region. The report concludes that forest based operators in the Comox Valley support the implementation of the Forest Sector Strategy, particularly because of its emphasis on marketing processes and activities that will serve to strengthen the forest based economy in the Comox Valley. The report recommends the

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following: the potential opening of a Forest Resource Centre; the creation of a networking system; the development of a directory of forest sector businesses; the compiling of education and training programs available to operators; the creation of an industry sector newsletter; and the implementation of a co-operative or pooled marketing. The report concludes that further considerations should be given to the establishment of a Central Marketing Bureau Agency as this has the potential to achieve the greatest potential benefits for Forest Sector operators.

### **52. *Nootka Sound Forest Sector Strategic Plan*, Synergy Management Group Ltd, 1998**

This Forest Sector Strategic Plan for the Nootka Sound region includes: a forest sector profile, an impact and linkages analysis; and a review of potential opportunities. The forest sector profile provides information on the region's forest industry; timber supply; fibre flow; major players in the primary and secondary sectors; and employment in the forest sector. The report demonstrates that the Nootka Sound region receives \$16.5 million from the government and generates wealth of \$78.5 million for government. The report lists opportunities identified at various public forums held as part of the study. These were narrowed down to the following eight opportunities: (1) a value added/ shared resource park in Gold River; (2) a pulp mill strategy to deal with mill closures; (3) First Nations joint ventures; (4) a Kyuquot preliminary strategy; (5) various value added opportunities such as a dry kiln, salvage wood, agro-forestry, waste wood processing, decking, etc.; (6) forestry related tourism; (7) education, training and workforce issues; and (8) eco-college: an extension to education and training.

### **53. *The Potential of Aboriginal Wood Carving in the B.C. Value-added Forest Products Sector*, Shawn Morford, 1998**

This study explores the market potential of Aboriginal carving in the arts markets and the value-added forest products markets. The report was prepared for the Kwakiutl District Council and Musgamagw Tsawataineuk Tribal Council. The report includes a review of: (1) the state of the Aboriginal wood art industry; (2) Aboriginal wood carving business niches (e.g. Aboriginal art/ gift ware, application of Aboriginal artistry to wood products and furniture, and custom carving services); (3) types of business structures (e.g. sole proprietorships, artist cooperatives, partnerships and joint ventures); (4) market advantages (e.g. little wood supply required, product differentiation, culturally appropriate and low start up investment); (5) market constraints (e.g. not well known, furniture market is a price driven product, few Aboriginal owned manufacturers); (6) trends affecting marketability (e.g. Canada/U.S. exchange rate, overall economy, regulations and availability of old growth trees); and (7) conclusions and recommendations. The greatest hurdles to industry are to find ways to connect artists with manufacturers; effectively market the products and keep costs down. The report makes four recommendations as follows: (1) conduct further market and product development research; (2) compile an inventory of local carvers; (3) facilitate interactions between retail businesses, forest product manufacturers and artists; and (4) provide financial support to the development of wood artist cooperatives to assist with marketing, material supplies and training.

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### **54. *Proposal for a Community Forest Pilot Agreement*, Property and Economic Development Department, Campbell River, 1998**

The District of Campbell River's proposal for the community Forest Pilot Agreement requires a 14,000 hectare land base on which to operate such an area based activity. This proposal incorporates several different types of land to form the required land base. It is the objective of the District to bring more local control to the forest management of lands surrounding the municipality. Section 2.0 of the submission outlines the proposed land base for the Community Forest. Section 3.0 details the Management Objectives for the Community Forest. Section 4.0 outlines the District of Campbell River initiatives that evolve from Forest Sector development. Section 5.0 is an overview of the approach to managing the forest interests and how the Municipality will incorporate the tenure into Municipal operations.

### **55. *Sources and Utilization of Wood Waste in the Comox Valley - Campbell River Area*, Econ Consulting Ltd. (Harold Macy and Wolfram Wollenheit), 1998**

The purpose of this study is to identify alternate sources of raw materials and suggest innovative processes and products employing these previously underutilized assets. This report is part of the Comox Valley Forest Enterprise Implementation Strategy. The report presents an estimate of the volume of wood waste generated in the region (approximately 250,000 m<sup>3</sup> of wood waste). The report also includes a review of potential uses for wood waste including: small wood products, fire wood and kindling, hog fuel, fuel pellets, compost and other landscaping material and land fills. The report concludes that opportunities exist for specialty mills to increase the recovery of red cedar and turn lower grade wood into high quality products (slabs and bucking ends, which make up 40% of the local wood waste, contain considerable amounts of clear wood). The report also concludes that locally produced firewood needs to be packaged, marketed and distributed more effectively. The utilization of small dimension wood also presents an opportunity.

## **Tourism/Recreation Sector**

### **56. *Artlish Caves Park Inventory and Monitoring Project*, Cave Management Services, 2000**

The purpose of this project is to develop an inventory of trails in the Artlish Caves Park on Vancouver Island. The report includes: (1) BC Parks Backcountry Recreation Impact Monitoring Forms for various sections of trails; (2) trail profile diagrams and maps; (3) a description of cave attributes and issues; and (4) other survey and monitoring data. (Full Report not available)

### **57. *Coastal British Columbia Economic Gain Spatial Analysis, Tourism Sector Report*, The Economic Planning Group, January 2003**

This is Phase 2 of the First Nations Coastal Tourism Strategy. Phase 2 consists of an analysis of existing tourism opportunities or possibilities from a spatial perspective. For purposes of their

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study, The Economic Planning Group employ two classifications, lodges ( built development) and activity products (non-built development) which include cruise ships, First Nations' cultural products and services, kayaking and wildlife viewing. The LRMP areas for the Central Coast and North Coast are used as the basis for identifying planning units for the spatial analysis. The Central Coast is divided into 29 planning areas of which some are within the Comox-Strathcona region. The North Coast is divided into 22 planning areas. A table for each LRMP region lists the planning units, a rating of the suitability of lodge and activities, and a description of possible development sites. It is important to note that the rating are subjective and are based on the knowledge of the analysis and the resource information available for the evaluation.

While acknowledging that many external factors influence tourism development, the report focuses analysis on identifying areas and sites having attributes important to tourists and necessary for tourism development. The study:

- Cites the area's remoteness, high scenic values, significant resource features, and relatively undeveloped nature as the continuing key draws;
- Concludes that the markets will continue to be relatively affluent, staying from a few days to a week in a wilderness lodge or pursuing a nature-based activity;
- Identifies that the activity focus will continue to rely on quality fishing and wildlife viewing opportunities and First Nations culture;
- Determines that building or expanding lodges will continue to be a major tourism development focus; and
- Identifies that the cruise sector offers tremendous opportunity for economic gain, if both the large cruise ships can be encouraged to regularly build Prince Rupert into their itineraries and the small vessels can be encouraged to stop at other coastal communities.

The report cautions that the future opportunities identified in the study are resource based and represent only one component of the tourism development decisions process. Turning these resource opportunities into tourism developments, requires project specific feasibility assessments and investments by individuals, groups, companies or communities.

### **58. *City of Courtenay Community Goals and City Policies on Arts and Culture*, Bernie Jones and Bob Yates, November 3, 2003**

This policy document has been prepared at the request of the City of Courtenay. While the City values and regularly supports the arts and culture, it has never had the benefit of an overarching policy to guide its actions. In January 2003, it determined that the development of such a policy was a priority. The policy contained in this document is based on, and derived from, the community's goals with respect to arts and culture, as voiced during a spring 2003 planning process.

### **59. *Comox Valley Tourism Current Marketing Plan 2003/4*, Comox Valley Tourism, August 25, 2003**

This plan addresses the route to the consumer that utilizes the tourism trade. A focus has been given to indirect marketing via external public relations, partnership development and media

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initiatives. Comox Valley Tourism has the potential to present a YQQ media campaign that will grow substantially over the next two years. They have a better opportunity now to place greater importance on PR and media and to grow those areas of a PR/media marketing plan with partnerships that show the regional diversity of their customers. Extensive growth over the two years following the plan was to occur with the new branding as the tool to improve the visibility to the potential visitor and within the travel trade.

### **60. *Comox Valley Visitor Services Strategic Plan, Lions Gate Consulting Inc. and Peak Solutions Consulting Inc., February 27, 2004***

The Comox Valley Economic Development Society commissioned this report to review visitor information services in the Comox Valley and the preparation of strategy recommendations to ensure funding partners obtain value-for-money and maximize the opportunities for servicing visitors once they enter the region. Information for this report was obtained through a literature review, personal interview program, planning workshop and best practices survey. The result is a five year strategic plan which includes the following components: organizational and legal framework; operating budgets; strategies for enhancing tourism revenues and retention by local businesses; partnership development; communications; and, benchmarking and evaluation.

### **61. *First Nations Coastal Tourism Opportunity Strategy, Phase One Report, Synergy Management Group Ltd., September 2002***

Phase One focuses on compiling, analyzing and assessing the 'interconnectivity' of the host of reports, studies and sector strategies done to date, extracting 'common themes' relating to strategies and opportunities, and developing a series of recommendations designed to enhance First Nation Coastal Tourism. Phase one accesses forty-one reports and thirty-four websites. The major principles/strategies and recommendations identified by Synergy management Group Ltd. include: build on existing planning; wildlife, natural settings; infrastructure; government; ecotourism; entrepreneurship; joint venturing; funding growth; cooperative initiative; training, capacity building; and, culturally significant tourism.

Opportunities or tourism products which are identified for coastal First Nations are grouped into: Outdoor Marine Adventures; Outdoors Land-Based Adventure; Traditional Outdoors Activities; Cultural Tourism; Arts, Culture; Accommodations; and, Cruise Industry. More specifically the report recommends and assesses the feasibility of the following opportunities: Guided Wildlife Viewing-Marine; Rental of Kayak Expedition Equipment; Shuttle Service for Kayakers, Mountain Bikers, Backpackers; Guided Kayak Tours & Trips and Whitewater Kayaking; Marine Hut-to-Hut Operations; Marine Cruises; Boats at Moorage; Scuba Diving; Land Hut-to-Hut Operations; Guided Wildlife Viewing – Land; Trains/Hiking; Motorized Adventures; Guided Fishing; Guided Hunting; Cultural and Historical Expositions; Designing & Building a Traditional Village; Recreation of Traditional Travel Routes; Artists' Centre; Lodging; Hardened Campsites; Retreat Centres; Cruise Ship Industry; Supply & Services for Pocket Cruise Ships; and, Pocket Cruise Industry Opportunities.

While each of the tourism products is presented individually, real opportunities arise when several goods and services are offered within packages that are more likely to draw visitors to

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the report communities on the coast. The most imminent issues identified in the literature and interviews as requiring attention prior to tourism opportunity development are the protection of the natural and cultural resources, infrastructure needs (including investment), and training and education.

### **62. *First Nations Coastal Tourism Strategy, Overview*, First Nation Coastal Tourism Steering Committee, March 2003**

This report was prepared as a result of the completion of Phases One and Two, , and represents Phase Three of the larger First Nations Coastal Tourism Strategy project. The report reviews both previous phases and recommends strategic directions and opportunities that First Nations should pursue to develop a long term tourism industry. The report notes that three major themes support tourism development on the Central and North Coast within an ecosystem-based planning framework: 1) protection of the resource base, 2) support for community and business development (and infrastructure), and 3) increased human and community resource capacity. In total 8 recommendations are outlined including within each a chart, which delineates Committee Strategy Recommendations, Actions, Action Group (s), and Expected Outcomes. The 8 recommendations are: Integrated Tourism Planning; Governance; Stewardship; Infrastructure; Human and Community Training/Capacity Building; Community Capacity and Business Development; Tourism Opportunities; and, Joint Ventures. At the end, it is recommended that the report should be reviewed and discussed by the Turning Point Initiative, Kwakiutl District Council, MTTC and MSRM with the intent of developing an action plan stemming from the recommendations. The action plan should clearly identify the next steps toward the development of a First Nations coastal tourism industry.

### **63. *Forest and Fisheries Tourism Opportunities Study for Portions of the Campbell River and Port McNeill Forest Districts*, Clover Point Cartographics, March 2000**

This report was carried out to identify opportunities for sustainable community-based tourism development on the North Island and Mainland Coast. The study area includes portions of the Campbell River Forest District and the mainland portion of the Port McNeill Forest District. Tourism development, capacity, infrastructure and services among communities in the study area varies widely, from relative diversity in Campbell River and the Comox Valley to a complete lack of development on the Mainland. The major strengths of the study area are its diverse natural attributes, low population densities, transportation infrastructure (in major centres) and destination products (e.g. Mount Washington, Strathcona Park). Weaknesses include a lack of access into potentially productive alpine areas, difficulty in obtaining access to Commercial Recreation tenures, creeping urban sprawl along Highway 19 and the dependency on the BC Ferry system to transport visitors between the region and the lower BC mainland. Opportunities covered include: ocean kayaking; Nordic skiing/ski touring; lake/river activities; marine cruising; culture/nature/wildlife viewing; mountain biking/bike touring; hiking; 4X4 auto/atv; destination lodge/resort; and, hut-to-hut touring. Further breakdown within each group of opportunities is provided for each part of the study area.

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### **64. *Forest Sector Tourism Plan, Paradise Found Adventure Tours (Catherine Temple), 2002***

The purpose of this report is to define tourism product potential in the Sayward Valley and surrounding region (approximately 65 km north of Campbell River). The report includes: an overview of the value of tourism in B.C.; a summary of the product potential for the region; an inventory of existing tourism products; and a description of natural attractions in the region. The inventory describes: forestry campsites within a 35 km radius of Sayward, parks, reserves, historical sites, recreation trails, the Sayward harbour and community facilities. The natural attraction includes: the Cypress Preservation Society, water sports, whitewater rafting, river floating (kayaking and canoeing), saltwater kayaking, marine touring, cycling, caving, freshwater fishing opportunities, stocked lakes in the region, wildlife viewing potential and the Mt Cain Alpine Park Society. The report also describes some initiatives to market tourism products including the Visitor Information Centre, community partnerships, Internet marketing and media relations. The report concludes that the Sayward Valley and surrounding region has much to offer the travelling public.

### **65. *Marketing Action Plan for V.I.N.V.A. '98, Marketing the North Island to the Rest of the World, Gail Meech Robillard and Karen Graham, 1998***

The Vancouver Island North Visitors Association (V.I.N.V.A.) is an extension of Tourism Vancouver Island. The V.I.N.V.A. was formed by partners in tourism North of Sayward and Gold River. The purpose of the organization is to market Northern Vancouver Island regionally, provincially and internationally. The V.I.N.V.A. has held annual conferences since 1996. This brief report includes a description of the V.I.N.V.A.'s purpose; its marketing objectives and a marketing strategy for the 1998/1999 year.

### **66. *Nootka Sound Forest Recreation and Tourism Opportunities Study, Clover Point Cartographics Ltd., 1998***

This report describes the biophysical, cultural and infrastructural resources which support recreation and tourism activities in Nootka Sound and addresses some of the opportunities, issues and constraints relating to job creation and business development in the regional tourism industry. Forest Renewal BC, the Ministry of Forests and the Ministry of Small Business, Tourism and Culture funded the report. The report includes a review of (1) industry trends in tourism and recreation; (2) tourism and recreation activities in the Nootka Sound; (3) capability modelling and maps showing recreation features, marine access, road access, etc.; (4) constraints, opportunities and concerns; and (5) conclusions and recommendations. The report concludes that the majority of the high capability areas for potential development of tourism products or recreational activities are found near the communities, water (coast and lakes), or along major access routes. In most cases, the best opportunities for development do not conflict with the best opportunities for forestry development. The report identifies various infrastructural

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developments and recommends various factors to be considered in evaluating which development should have the highest priority.

### Transportation

#### **67. Comox Valley Airport Air Cargo Feasibility Study Phase 1, Vancouver International Strategic Services, January 26, 1999**

The objective of this study is to determine the feasibility of air cargo operations at the Comox Valley Airport (YQQ), and to develop the strategy for their development. This study has been divided into two phases. The objective of this Phase 1 report is to determine the economic viability of air cargo service into and out of YQQ. Phase 2, if commissioned, will focus on the actual market planning, strategies and development. This Phase 1 report discusses how direct air service to YQQ will support value-added processing of seafood and agricultural products in the Comox Valley region. The economics of air cargo do not favour air transport of goods to a gateway for further processing before onward shipment to the end consumer market.

While the report finds there are sufficient quantities of air freight to support some direct air cargo service to YQQ, there are still many challenges to overcome. For direct shipment of air cargo, there will need to be expanded value-added processing capacity for these products, inspection and packaging services, development of air cargo facilities on or near the airport grounds, likely requiring refrigeration, aircraft fuelling services, airport handling services etc. These are part of the subject of the Phase 2 study.

#### **68. Comox Valley Airport Air Cargo Feasibility Study Phase 2, InterVISTAS Consulting, December 1999.**

This study focused on the market planning, analysis and strategies for the development of dedicated air cargo service at the Comox Valley Airport (YQQ). This study had two phases. Phase 1 determined the economic potential of such a service through the analysis of product flows to and from the Comox Valley and surrounding region. The analysis showed that the volumes and values of products originating in the Comox Valley area, and that are being shipped off to Vancouver Island, are sufficient to support some form of air cargo service to YQQ. This is particularly true of seafood and agrifood products originating in the potential service region of YQQ.

#### **69. Comox Valley Airport 2003 – 2007 Business Plan, Comox Valley Airport Commission, August 2002**

The Comox Valley Airport is one of the fastest growing passenger airports in B.C. Passenger traffic in recent years has grown so rapidly that the current air terminal building and related infrastructure are no longer adequate to meet the needs of the site. The CVA Commission has developed a successful business at the airport and now requires funding to carry out the necessary expansion that must be realized. This business plan includes: 1) An overview of the

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CVA; 2) Airport's passenger and cargo growth; 3) Site operations; 4) Capital plan; and, 5) Financial plan.

### **70. *Comox Valley Airport Land Use Plan*, Stantec Consulting Ltd., March 2000**

The purpose of this report is the first step towards the realization of a commercial aviation development. CVAC engaged the services of Stantec Consultants Ltd. to prepare a preliminary land use plan for Area G and the adjacent private lands. The objectives of the study include: defining the location and size for operational facilities; identify land requirements and reserves for various airport subsystems; determine location and footprint for an air terminal building, air cargo facilities, and facilities required to support an FBO operation; and, assess potential alternatives for commercial development including commercial hangars and other aviation-related facilities.

### **71. *Comox Valley Airport: Opportunities for Adjacent Lands*, InterVISTAS Consulting Inc., August 2004**

This briefing paper was prepared for the Comox Valley Economic Development Society for a seminar on land uses for properties adjoining the civilian terminal at CFB Comox. The intent of the seminar is to discuss the economic potential of these properties, and appropriate related planning. The briefing provides information on: The Comox Valley Airport and its operations; Aviation security and aviation restructuring trends; Airport planning best practices on lands in the vicinity of Canadian airports; and, Scenario analysis of the potential for economic growth and development on the lands adjacent to the leased civilian air terminal and related infrastructure.

### **72. *North Island Straits Community Harbour Enhancement Feasibility Study*, RG Fuller & Associates, June 2003**

This report examines the existing facilities and potential additions. It offers a series of recommendations that address governance practices, economic development opportunities and priorities for further development in the short-term and long-term. These are to enable the harbour managers in the North Island to enhance and increase local benefits associated with harbour development and improve positioning for further port development. The report provides: a review of broad industry trends and their impacts on North Island Harbours; a review of governance issues and descriptions of basic models; a detailed review of each harbour including a description of facilities and usage; and, a review of current governance practices. A North Island Harbour Conceptual Work Plan is provided to help direct initial efforts. Only a small portion of the northern part of Comox-Strathcona Regional District falls within the North Island Straits. There is no specific harbour that would fall within the region however, since the other North Island Strait studies have been included, this one is included for consistency purposes.

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### **73. *Waterfront Lands Review, Harbour Depth Analysis & Servicing Analysis,* R.G. Fuller & Associates Ltd., 2002**

The purpose of this report is to identify an economic development strategy and action plan for the Village of Sayward with a particular emphasis on the waterfront lands at Kelsey Bay. The study focuses on three parcels, which are owned by Weyerhaeuser and are typically referred to as the "maintenance shop area" and the adjacent log sort (parcel 1), and the 2 lots across Sayward Road (parcels 2 & 3). Weyerhaeuser has consolidated many of its north island operations, which has resulted in the shut down of operations at Eve River, and at Kelsey Bay in Sayward. Weyerhaeuser wants to retain the majority of the log sort area, but will make available for lease or sale much of the remaining lands. This report includes an overview of the Waterfront Lands; harbour depth; servicing; and development opportunities. The report concludes that the Waterfront Lands at Kelsey Bay in Sayward are a valuable asset to the community and present a unique opportunity for new industry considering locating in the region.