

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

*Inventory and Assessment of Regional Economic Development
Reports and Studies : Appendix (In Depth Review)*

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Reader's Notes

As part of the economic development modeling mandate carried out in regards to the Comox Strathcona Regional District ('CSR D'), 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. 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 economic initiatives that can be brought 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 or were not of general knowledge to the reviewer.

A total of **74** studies and reports (primarily 1998 and up until present) that address economic development and opportunities for the Comox-Strathcona Regional District were identified and reviewed. For purposes of this analysis, the studies have been grouped into the following sections:

- *General (covers more than one economic sector) – 23 studies*
- *Agriculture – 2 studies*
- *Aquaculture and Fisheries – 6 studies*
- *Energy (including 'Oil and Gas') and Mining – 2 studies*
- *Forestry (including Value-added) – 23 studies*
- *Tourism and Recreation – 11 studies*
- *Transportation – 7 studies*

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. The studies included in this Appendix of the 'Inventory of Studies' have been reviewed and summarized under the following sections:

- *Title, Author, Date*
- *Identified Opportunities*
- *Opportunity Strengths, Weaknesses and Threats (SW&T)*
- *Identified Economic Benefits of Opportunities*
- *Action Plans Regarding Opportunities*

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Where the consultant's access to studies and reports being reviewed is limited to only an annotated synopsis, with no 'full study' available, then the annotated review, as presented in 'Annotated Review of Studies' (Synergy Presentation # 2), is repeated verbatim herein in this 'In Depth Review' (Synergy Presentation # 3).

In some cases, 'strengths, weaknesses and threats', opportunities, action plans and economic benefits have been derived from the general text and do not come from a succinct list provided by the study author. At times what one author referred to as strategies may be opportunities, or what another may refer to as recommendations may look like action plans. Best efforts were made to be consistent.

- *Opportunities had to be implementable.*
- *If the information provided seemed to cross between strategies and opportunities a note was made to refer to one or the other section.*
- *Only portions of the reports that refer to Comox-Strathcona are included unless the information is general in nature and detail down to the level of the CSRD was not included.*

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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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 29th 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 17th 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.

There is no specific information on economic development in this OCP.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

This is the annual Economic Development Operating plan for 2004. As such it is about initiatives already in progress whose feasibility have already been addressed at an earlier time. It covers work, outputs, milestone dates and success factors. It does not address or assess new business opportunities. The business opportunities that are within the plan and in-progress are listed here for reference.

Identified opportunities

- Expansion of Quinsam Reman
- Small wood processing plant
- Shellfish
- Offshore oil and gas

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

As this report is a scan of the economic situation and trend, it does not discuss specific new opportunities that require further investigation.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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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 does not focus on business opportunities.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

Identified Opportunities

Opportunities listed below were derived from the text of the report and were not necessarily listed out as specific opportunities but were still viable options. The sectors in which no specific opportunities were highlighted have been left out.

Agriculture

- Comox Valley Farmers' Market provides an opportunity for many of the area's niche operators to display and sell their products.
- Agri-tourism including bed and breakfasts, farm work vacations, on-farm attractions and games, cultural performances, and on-farm markets. Iron River Farms, for example, produces cranberries but also gives farm tours.

Agroforestry

- Agroforestry, which is a combination of agriculture and forest production techniques, is a major growth area for the Comox Valley.
- The industry will flourish if a movement is made away from the selling of commodities toward the selling of distinctive, value-added products.
- Market demand for alternative health products from the aging baby boomers will increase the demand for some medicinals and botanicals in the area.

Aquaculture

- The potential for geoduck sales is enormous.
- The Comox Valley is home to some value-added seafood processing, but there is potential for more.
- Taking advantage of expanding shellfish production not just in the local area but on the west coast of Vancouver Island and other nearby areas in Georgia Strait, such as Powell River, Okeover Arm and Malaspina Inlet, Quadra and Cortes Islands, and the Sunshine Coast, to provide critical mass for processing activities.

Communications and Utilities

- Opportunity for small-scale power generation including hydro generation on a smaller scale on rivers and streams, but also "green power", including wind power, solar power, and new technologies such as fuel cells.

Forestry

- Development of Bevan Road Value Added Village is designed to enhance local value added manufacturing.

Mining, Oil & Gas

- The greatest potential for future development is with coal bed methane.

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Opportunity SW&T

Agriculture and Food

Strengths

- Comox Valley is a leading centre of agricultural activity on Vancouver Island strong in primary farming activities and meat and poultry manufacturing.
- The industry as a whole is quite diversified locally into many types of agricultural production.
- There is a trend toward the growth of niche operators producing more unique, higher-value products.

Weaknesses & Threats

- Processing is less prominent in the Valley compared to the rest of B.C.

Agroforestry

Strengths

- Agroforestry is a young and growing industry in North America with great potential for the Comox Valley.
- Agroforestry operations provide multiple income streams over a period of many years (including, for example, agricultural crops, nuts or tree fruit, and high-quality timber)
- A related area is non-timber forest products, which can be integrated into an agroforestry operation.
- The Comox Valley has an appropriate climate, a high proportion of private land holding (which provides clear property rights over forest products, unlike much of the rest of the province), a history of agroforestry production, and a concentration of wholesalers who can take products to market, which all point to growth

Aquaculture

Strengths

- Significant source of past and future economic growth for the Comox Valley.
- Natural conditions in Baynes Sound are the best in British Columbia for shellfish aquaculture production.
- Baynes Sound accounts for over half of shellfish production by value in BC.
- The large processing operation, Aquatec Seafoods allows the local area to benefit from the much larger salmon aquaculture industry in Campbell River and other areas further north.

Communications and Utilities

Weaknesses

- The communications and utilities industry is dominated by large utilities and media companies that provide service throughout the province.
- Most employment is concentrated in major urban centres, or near large facilities, neither of which apply to the Comox Valley.

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- The Valley is underrepresented in all aspects of this industry relative to Vancouver Island and British Columbia.

Forest Industry

Strengths

- The forest industry is of vital importance to the Comox Valley economy and is more concentrated in the Comox Valley than in the rest of Vancouver Island and British Columbia.
- Primary logging activity in particular is a strong point .

Weaknesses

- The local industry is weakest in manufacturing.

Mining and Oil & Gas

- The Comox Valley is thought to contain vast reserves of coal bed methane that if successfully accessed, could provide a secure local source of natural gas supplies for the Valley and other parts of Vancouver Island.

Identified economic benefits of opportunities

- 2% of the total basic income in the Valley can be attributed to the agriculture and food industry.
- For every five jobs in the agriculture and food industry, another job is supported in the community.
- An estimated \$50 million of floral greenery is produced on Vancouver Island each year.
- Agroforestry is capable of generating multiple income streams that are realized over varying time frames, stabilizing both family income and the local economy.
- The economic multiplier is higher for shellfish aquaculture than for agriculture, food processing, and the wild fishery.
- An estimated 13% of basic income in the Valley is provided by the forest industry. Every 10 jobs in logging support 4 others, while every 3 jobs in wood manufacturing support 1 other.

Action plans regarding opportunities

None noted

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

Identified Opportunities

- Retirement Living cluster may include: Community Care Facilities for the Elderly; Offices of Physicians
- Air transportation and related services cluster may include: Passenger Car Rental; Truck, Utility Trailer and RV (Recreational Vehicle) Rental and Leasing; Scheduled Air Transportation; Non-Scheduled Chartered Air Transportation; Non-Scheduled Specialty Flying Services; Couriers
- The planned development of industrial lands adjacent to the airport, including some with airside access, will create opportunities for businesses in a wide variety of industries to take advantage of airport infrastructure.
- A food manufacturing cluster may include: Other Animal Food Manufacturing; Frozen Food Manufacturing; Fruit and Vegetable Canning; Pickling and Drying; Seasoning and Dressing Manufacturing; Seafood Product Preparation and Packaging; Wineries; Soft Drink and Ice Manufacturing (water and water-based beverages only)
- An information and data processing services cluster may include: Data Processing Services; Telephone Call Centres; On-Line Information Services; All Other Information Services

Opportunities SW&T

Retirement Living

Strengths

- The number of senior citizens residing in the Comox Valley is projected to nearly double from 9,600 today to 18,200 by 2031.
- The community is already attracting an increasing share of the Vancouver Island retirement living market, a trend that is projected to continue.
- The natural beauty of the Island, its high quality of life, and pleasant climate are all draws for retirees from across Canada.

Weaknesses

- Recruiting and retaining physicians in non - metropolitan areas is an ongoing challenge that is being addressed by the provincial government and the BC Medical Association.

Air Transportation

Strengths

- The recent history of the Comox Valley Airport is marked by rapid expansion in revenue passengers, physical facilities, and ancillary services.
- Presence of many highly trained air transport personnel from the Air Force Base is a further benefit for attracting investment.
- The geographic position of the airport as the closest major airstrip to Asia is a further clear advantage.

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Food Manufacturing Strengths

- Food manufacturing is plausible when focussed mostly on seafood and locally produced agricultural products.

Weaknesses

- Food manufacturing opportunities can be done on a small scale but are limited to large scale production due to location and insufficient input of resource.
- Moving food products out of the Comox Valley is a key challenge.

Information and Data Processing Strengths

- British Columbia has been quite successful in recent years in attracting higher-value services in this cluster particularly inbound call centres.
- The Comox Valley may have an advantage for call centres seeking French-speaking staff, as there are believed to be a large number of underemployed French-speaking spouses of military personnel stationed at CFB Comox.
- Targeting this cluster may be a simpler process than for some other clusters due to the existence of Linx BC.

Identified Economic Benefits of Opportunities

- Over the next several decades the increase in the retiree population in the Comox Valley has the potential to create hundreds of new jobs in care facilities and retirement communities.
- Diversification of the economy.
- Call centres have been known to create upwards of 1,000 jobs.
- The Comox Valley is more likely to attract a series of firms involved in manufacturing or air cargo or importing/exporting that may each employ up to 50 people rather than single operations that will employ hundreds.
- A large food processing facility in the Comox Valley may have up to 200 jobs.

Action Plans regarding opportunities

It is recommended that these clusters be taken forward to a public and industry consultation process in Phase II of the Economic Development Strategy.

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

Identified Opportunities

Tourism

- Eco-tours and nature tours, as well as salt and freshwater fishing.
- Historical and cultural tourism, particularly as the departure and return point for tours to Yuquot.

Existing Opportunities	Future Attractions/Activities	Future Services
M.V.Uchuck III The Great Walk Caving, tours Strathcona Park Lodge Aquatic centre Fishing (salt and freshwater) Air Nootka Ltd. Marine charters Diving, wrecks Golf course	Packaging of concept "Gateway to Nootka Sound." "Getaway packages" for persons living in region. Day trips for persons living in region, with Gold River as the anchor at the end. Sporting events (hockey, swimming, golf, etc.) Special events (arts, festivals, etc.) Conferences and workshops Educational programs Triathlon type competitions Historical tours Hiking trails and viewpoints (also add something unique such as the "Totem Walk" in Sitka or an "art in the forest" walk) Youth hostel and Elderhostel Activities for a wet day Helicopter tours/Flight Seeing Work with First Nations to develop appropriate attractions and services at Yuquot Expanded sport-fishing services (e.g., fly in, boat repairs, etc.) Sea kayaking, mother ships Heli hiking Mountain biking Meditation centre/school Mountain, marine rescue training school Wildlife viewing Rainforest tours Flights to Hot Springs Cove	Marina Boat ramp Boat rentals Kayak rentals Other activity rentals Secure parking Local freshwater guides

Small Business

- Service centre for boats on the West Coast
- Generation of power at the mill site
- Development of greenhouses using power from the mill site
- Computer programming

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Natural Resources

- Production of dimension stone and production of limestone for agricultural purposes.
- Development of the bottled water market may also present opportunities.

Mariculture

- Nootka and Kyuquot Sound areas provide excellent site opportunities for a variety of methods of shellfish and finfish aquaculture production.

Forestry Value-added

- The Nootka Sound Economic Development Corporation has a community forest license of 40,000 m³ of which 25% (up to 12,000 m³) is allocated to local value added. The Mowachaht/Muchalaht First Nations have another general allocation of 20,000 m³. This level of fibre access represents a significant opportunity for value added processing.

Opportunities SW&T

Tourism

Strengths

- The road to Gold River passes through some spectacular scenery.
- Cultural, historical, and marine related tourism possibilities.
- Excellent recreational infrastructure.

Weaknesses & Threats

- Lack of attractions and things for tourists to do in the Village of Gold River to make them stay longer.
- Lack of tourist services.
- Many of the attractions and activities in the area are distant from Gold River and therefore provide limited direct benefit to the community unless the community can add value to the tourist experience.
- Lack of service ethic and tourism awareness in the community.
- An ever-increasing competitive tourism market.
- Lack of co-ordination among various groups and agencies in the community that are affected by tourism, with resultant overlap and reduction of efficiency.
- Seasonality of the tourism industry and the limited number of full time jobs that it offers.
- Lack of land and water access for marine based tourism activities and potential conflict with industrial uses of land along the waterfront.

Small Business

Strengths

- A number of people moving to the area to retire which creates a new type of economy.
- Development of the "information economy" and related technology enables individuals to live in areas like Gold River and sell products and services around the world.

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Weaknesses and Threats

- Financing through regular channels is expected to become difficult as lenders question the viability of the community, and therefore the value of any assets that can be taken as security against loans.
- Gold River struggles in competition with a service centre such as Campbell River.
- The lack of co-ordination among various groups and agencies in town, with resultant overlap and reduction of efficiency presents a challenge to the survival and development of small business.
- The shrinking of the primary and secondary sectors of the economy.
- Absentee landlords, who appear to have little interest in upgrading their facilities to re-generate the community, own a number of local commercial facilities.

Natural Resources

Weaknesses and Threats

- The amount of land available for mining development is limited due to proximity to Strathcona Park and areas identified by interest groups as environmentally sensitive.
- Deactivation of logging roads reduces the ability of prospectors to access the backcountry for purposes of exploration.
- Moratoriums on the export of bulk water and on oil and gas exploration off the West Coast.
- Development of natural resources can have deleterious effects on the environment if not managed carefully.

Mariculture

Strengths

- Fish farms, oyster and clam leases are already established near Zeballos and Kyuquot.

Weaknesses & Threats

- Lack of staffing, resource use incompatibilities, First Nations land claims, and environmental impacts are stated as reasons for delay in expansion of aquaculture in the region.
- Cost of tenures and investment in production assets requires significant amounts of capital.
- The Mowachaht/Muchalaht First Nation is generally not in support of finfish aquaculture.

Forestry Value-added

Strengths

- Harvest and sale of botanical forest products also represents an income opportunity.

Weaknesses & Threats

- Limited experience in the community in running small businesses of this type.

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- The fibre content of the community forest allocation has to be negotiated with Western Forest Products which could make a predictable response to specific markets difficult.
- Access to a kiln facility for both large and small-scale value added operations will need to be developed.
- Most of the small business sales are currently purchased by interests outside the region and harvested using non-local crews.
- The harvest of botanical forest products is labour intensive.

Identified Economic Benefits of Opportunities

- Other activities in tourism and industry can provide opportunities for small business.
- Any diversification in the economy produces spin-off opportunities.

Action Plans regarding opportunities

More detailed charts are found within the report.

Tourism

Short term (1999)

Build on the existing tourism attractions and services in the community and generate visitor traffic from markets that are easy to access quickly. Maximum use should be made of government employment and training programs while they exist, both to assist in the development of infrastructure and also to generate income within the community.

Intermediate term (2000 to 2001)

Assess initiatives started in 1999 and those judged successful should be continued and expanded in the future.

Long term (2002+)

Continue to build on those initiatives that have proven successful.

Small Business

Short term (1999)

- Stabilize the small business sector of the economy and ensure its survival.
- Take steps to generate and retain as much cash flow in the community as possible.
- It is also of high priority to work with Gold River Industries to develop new activities at the Bowater mill site as soon as possible, and to work with Galbraith to get the houses sold as soon as possible and generate economic demand from the new owners.
- Opportunities to generate revenues to the community from decommissioning the mill must also be explored.

Intermediate term (to 2001)

Assess the small business economy after the general employment situation has stabilized and start to build on the basis of that stabilized economy.

Long term (2002+)

Focus of the long-range plan should be to continue to build on those initiatives that have proven successful.

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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.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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9. <i>Kyuquot Region Forest Sector Strategic Plan</i>, Synergy Management Group Ltd., 1998

Identified Opportunities

- Boat and Canoe Building School
- Heritage Tourism
- Off Season Attractions
- Aquaculture
- Nootka Value Added Cooperative

Opportunity SW&T Strengths

- good labour force
- good relations with First Nations
- quantity of fibre
- experienced workforce
- opportunity to participate in bidding process
- remote location
- reputation
- strong entrepreneurship
- natural land and marine assets
- Native heritage
- stands of old growth forests
- ecotourism opportunities
- low population

Weaknesses & Threats

- environmental concerns
- high labour costs
- not enough local fibre
- need to use (not burn) short logs at Interfor
- need to provide the ability to salvage logs
- need funding for SBFEP for small operators
- market conditions

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- union regulations and issues
- government policies and direction
- the tenure and bidding system
- local mindset
- Native versus non-Native
- operators leaving the region
- high transport costs
- remote location
- limited, scheduled access
- operators not working together to market
- forestry operations & visible clearcutting
- short tourist season
- little piggybacking on Nootka Sound
- little piggybacking on Tourism BC, others
- garbage disposal
- focus of environmental groups
- small population yields few businesses
- access to funding for ventures
- strong reliance on forestry jobs

Identified Economic Benefits of Opportunities

- Estimated to possibly create 5-6 jobs
- Skills development
- The encouraging of entrepreneurs
- Establishment of a year round value added industry.
- Better access to fibre, funding, market contacts, new business and market ideas, availability of technical and business training, and the ability to piggyback any of the initiatives of the group, including possibly working together with other existing Nootka operators to generate combined finished products.

Action Plans regarding opportunities

- Determine the feasibility of actively promoting tourism in light of heritage and Native tourism.
- Future Sea Farms (Nanaimo) be brought on board to examine the potential for expanding and developing the region into a salmon (or other species) farming economic centre.

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10. *The Kyuquot Sound Coastal Plan*, MSRM, Draft March 17th, 2003

Identified opportunities

- Aquaculture
- Marine-related tourism - boat havens and public docks
- Log handling and storage

Opportunity SW&T Strengths

- Shellfish harvesting has recently grown in economic importance, and has been extended to historically underutilized species.
- The Ka:'yu:'k't'h and Che:k'tles7et'h' Band Council supports finfish aquaculture within its traditional territory.
- Tourism opportunities benefit from wilderness attributes and isolation.
- Substantial additional recreational tourism activity by independent sport fishers, kayakers, and coastal cruisers.

Weaknesses & Threats

- The decline of west coast salmon stocks and the rationalization of the fishing industry (i.e. the federal buyback program) have led to the closure of local processing facilities.
- There are local concerns about the potential conflicts associated with finfish aquaculture, with respect to resources such as shellfish beds, predators, and wild salmon stocks.
- Tourism and recreation activity in the Plan Area is very seasonal, taking place between May and October.
- Since most recreational tourists are self-sufficient, they tend to bring supplies and equipment from home, which limits local benefits.

Identified economic benefits of opportunities

- The annual harvest of shellfish (including clams, geoduck, crab, octopus, prawn and urchins) is now several times the salmon harvest in Area 26 off Kyuquot Sound.
- Shellfish harvesting is a seasonally important economic activity for a small number of businesses and a larger number of casual workers.
- Fish farms also provide some indirect employment in firms servicing the aquaculture operations.
- The finfish aquaculture industry is now actively engaged with local First Nations groups regarding employment benefits, supplier arrangements and partnerships.

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Action plans regarding opportunities

- Conduct Shellfish Aquaculture Capability Study
- Conduct Marine Industry Barriers and Opportunity Study
- Official requests submitted from agencies for notations of interest
- Develop operating guidelines/ performance based standards for minimizing impact of tenure operations on bird colonies & migratory bird habitat
- Establish notations and reserves
- Conduct tourism product analysis
- Initiate marine conservation & assessments
- Prepare 1st Annual Audit & address Plan amendments
- Prepare 2nd Annual Audit & address Plan amendments
- Prepare 3rd Annual Audit & Formal Plan Redraft (if required)

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11. Local Economic Analysis: Campbell River Market Region, Draft Report, Rivercorp, MMK Consulting & Vann Struth Consulting Group, March 2004
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The purpose of this report is to analyse the major influences on the local Campbell River economy. It is review of the Regional District in context of the larger Region is taken directly out of Vann Struth's report which is already reviewed in this study, and therefore will not be repeated here. A broader industrial targeting process has helped to identify the best potential growth industries for Campbell River to target insomuch as they hold a competitive position in the region.

Identified opportunities

- Agriculture (animal production)
- Forestry and Logging
- Support activities for agriculture and forestry
- Manufacturing – food, wood, fabricated metal
- Retailers
- Transportation – air, water, transit and ground passenger, scenic and sightseeing, support activities
- Motion picture and sound recording
- Nursing and residential care
- Amusement, gambling and recreation
- Repair and maintenance

Opportunity SW&T Strengths

- CR is a major supplier of labour force and suppliers to the forestry and logging industry
- Wholesalers are located in the Campbellton area
- There is the emergence of small independent specialty food processors in CR such as Niko's Foods who deliver into the retail market regionally
- Timberwest invested \$8 M in their Elk Falls Sawmill in 2002
- CR excels in fabricated metal products manufacturing
- Scheduled air service into the CR Airport has grown
- Two deep-sea ports and four marina's plus a BC Ferry terminal
- Guide and package travel providers are growing and CR is an area where First Nation's expertise is beginning to show
- Skilled industrial trades have found their skills are transferable to the motion picture and sound recording industry

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Weaknesses & Threats

- Confusion related to changes in government policies and market uncertainties have stalled the growth of the forestry and logging sector.
- There is the challenge to access fibre from the public and private lands controlled by major companies.
- The shake and shingle mill is being challenged by demands to stop the watering and dewatering of logs in the Campbell River.

Identified economic benefits of opportunities

- Accommodating commercial shoots and skills development impacts and contributes to the retail and service commercial economy in short, seasonal bursts.
- TimberWest is building a 3rd shift for Elk Falls.

Action plans regarding opportunities

- Refine business licenses database
- Create a long list of potential opportunities
- Initial filtering to produce a workable “medium list” of opportunities
- Broader consultation on the “medium list”

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12. <i>North Island Straits Economic Opportunities Marketing Plan, Phase 1: Identification of Opportunities</i>, Daystar Marketing, May 2003

Full report unavailable.

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 as seen on the plan area map.

As is relates to Comox-Strathcona:

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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14. Outlook, The Faces of Forum '98, Forging the Economic Direction of Campbell River's Future, CREDO, 2000, www.credo.incampbellriver.com
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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 – completed now monitoring
2. Active Marketing Campaign for Campbell River Image – brought forward to 2000
3. Better Coordination Between Economic Development Groups – in progress
4. Deep Water Moorage Facility – in progress
5. Secondary Wood Manufacturing Opportunities – in progress
6. Downtown Fish/Farm Market – in progress
7. Promote Campbell River as a Retirement Community – brought forward to 2000
8. Improve Recreational Boating Facilities – in progress
9. Improve Sportfishing Opportunities – in progress
10. Lift Aquaculture Moratorium - monitoring
11. Exploit Hi-Tech Opportunities – in progress
12. Preserve Community's Waterfront – in progress
13. Fibre Optics Opportunities – brought forward to 2000
14. Expand Industrial Land Base – on-going
15. Market Campbell River Film Industry – on-going
16. Encourage Aboriginal Economic Development Participation – in progress

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.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

Identified Opportunities

Forest Industry

- Positioning to take advantage of the reallocation of cutting rights – in way of starting a community forest, assisting in the establishment of new value-added production facilities, and enhancing relationships with First Nations.

Mining and Oil & Gas

- Potential exists in aggregate. Offshore oil and gas production has economic potential.

Fishing Industry

- New fish and shellfish species are one growth possibility, while another is the longer-term increase of wild salmon stocks
- Fish processing has considerable growth potential through association with aquaculture growth, the development of higher value products and potential processing synergies between wild and farmed fish processors

Aquaculture

- Shellfish aquaculture – driven by growth in existing oyster and clam industry and the development of new species
- Research and development activities funded by the federal government and/or universities are also a potential growth area for some parts of the region

Tourism

- Regarded as one of the industries with the greatest potential for economic growth in the region.

Opportunities more specifically laid out for Comox-Strathcona include:

- Forestry – small scale harvesting and small scale value-added
- Mining Industry – Coalbed methane extraction and coal fired power
- Oil and Gas – offshore exploration
- Fishing – Minor commercial fleet expansion and finfish/shellfish processing plants
- Aquaculture – expansion of current production, aquaculture suppliers and research and development institutions, facilities
- Agriculture and Food – niche market food products
- Construction – residential and commercial
- General manufacturing – various small or mid-sized manufacturing
- Utilities – Small-scale power production

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- Tourism –sport-fishing lodges, high-end resorts, cruise ship visits, tourism events and attractions catering to ecotourists and cultural tourists
- High Technology – computer services, various advanced technology
- Transportation and Warehousing – air cargo
- Retail and Wholesale – general growth anticipated and expansion by major retail chains
- Business and Professional Services – Inbound call centre
- Retirement Living – continued influx of retirees
- Public Sector – educational, health and government services

Opportunity SW&T

Detailed strengths, weaknesses and threats are discussed in detail in the report under each industry sector. A sample of some of these points is listed below.

Strengths

- Location/Distance to Markets – proximity to Asia for air or ship cargo.
- Due to distance to markets there is opportunity for import replacement and greater exploitation of the regional market by local firms
- Given the landbase size and limited demand on its growth, tourism and recreation are still easily absorbed
- Strong shellfish resource

Weaknesses & Threats

- Location/Distance to Markets – problematic for industries like manufacturing
- Policies and Regulations – many of the region's most important industries are highly reliant on favourable policy and regulation to ensure their success, yet these policies and regulations are often designed in a fashion that inhibits economic growth and business success.
- With respect to resource industries and access to land, the uncertainty regarding the eventual outcome of First Nations treaty negotiations is a significant limiting factor in expanded economic development and also can create reluctance in some cases for First Nation Bands to enter into partnerships and agreements that they feel may jeopardize their outstanding claims.
- Many small business owners lack the skills, financial capital, and tolerance for risk, to grow their firms through exporting, adopting new technologies, or other practices.
- Decline in easily accessible old growth timber, a mismatch between processing capacity and what is required for current conditions, and changing and declining market demand.
- An ongoing problem for value-added manufacturers and small processors is securing access to a supply of logs that meet their requirements for size and quality.

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Identified economic benefits of opportunities

- Economic prosperity is based on the ability of a community to export goods and/or services beyond its borders, bringing money into the community.
- Businesses and industry sectors that are export-oriented form the economic base and drive the community's economy, supporting all other businesses and industry sectors that serve local demand.

Action Plans regarding Opportunities – none noted

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

Identified opportunities

- Manufacturing and Processing
- Transportation and Warehousing
- Professionals, Technicians and Scientists
- Recreation and Accommodation

Opportunity SW&T – none noted

Identified economic benefits of opportunities – none noted

Action plans regarding opportunities – none noted

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17. Sayward Community Directory, Sayward Futures Society, 2002

Identified Opportunities

- **Forestry related** value-added products and services.
- **Marine related** industries: value-added seafood processing, aquaculture, commercial and recreational marine products and services.
- **Tourism industry:** opportunities for eco- and adventure tourism, wildlife viewing. Excellent possibilities in film, cruise ship, transportation, accommodations and restaurant industries.
- **Agriculture:** value-added and organic products, nurseries, hay and silage and Farmers Market.
- **Transportation:** improvements to gravel runway at Salmon River Main and construction of floatplane docking facility. Value-added transportation services, local taxi, a shuttle to Ski areas, fishing charters and boat rentals.

Opportunity SW&T

None noted

Identified Economic Benefits of Opportunities

None noted

Action Plans regarding opportunities

None noted

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18. Sayward Community Profile, Sayward Futures Society, 2002

Identified Opportunities

- Value-added Wood Village
- Forest Recreation, Tourism and Education
- Finfish and shellfish farms
- Seafood processing, hatcheries and feed delivery
- Marine Ways
- Maintenance and repair of engines, boats and nets
- Crew boat construction
- Value-added agricultural products – organic and fresh produce as well as annual and perennial bedding plants
- Farmer's Market
- Agroforestry
- Tourism – full-service, all season marina with sports fishing and recreational coastal cruising, eco-tourism adventures, camping and RV parks, accommodations, restaurants and forest tours

Opportunity SW&T Strengths

- Two prime sites available due to the closure of the Kelsey Bay sort and the decommissioning of the Eve River sort
- Water and road access makes transport viable
- Sayward has room to grow
- Quality sites for raising farmed fish exist because of ideal biological and water conditions
- Rich soil and mild coastal climate make Sayward a prime area for raising crops and animals
- World class natural features in abundance available within a short distance of Sayward

Weaknesses & Threats

- Land availability depends on Weyerhaeuser's decisions
- Volumes of fish harvested are quickly outgrowing the infrastructure capable of processing the product
- New environmental regulations will require specific methods of disposing of holding tank and fish packing vessel blood effluent requiring upgrading of current infrastructure that handles such needs

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Identified Economic Benefits of Opportunities

- Changes in world market trends make local processing and secondary manufacturing ideal industries for Sayward
- Benefits to visitors and enhance local tourism
- Agroforestry can create economic diversification

Action Plans regarding opportunities

None noted

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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.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

Identified Opportunities

- **Adam and Eve Rivers** - This location offers the opportunity for a staging area and launching point for a number of other initiatives.
- **Shellfish Farming** - The Tlowitsis are currently applying for a tenure for shellfish farming.
- **Fresh Seafood Sales** - Development of a retail shop in Campbell River or an “off-the-wharf” sales booth for clams, oysters, salmon and value-added seafood products.
- **Karkulees** - It is located off Johnstone Strait and could provide a good location for a summer camp or a staging area for kayaking.
- **Forestry/Forest License** - If a forest license is realizable it could provide the Band with a base for a revenue stream.
- **Veneer Slicing Plant** - This project has been on the books since 1990.
- **Botanical Forest Products** - The harvesting and, more importantly, value-adding of various traditional FN medicinals, herbs and crafts can generate a reasonable cottage based industry for Band members.
- **Bottled Water** - There exists the opportunity of utilizing spring water taken from the Adam and Eve location and developing a line of Tlowitsis brand bottled water.

Opportunity SW&T

Strengths

- There are some individuals with a good education base that could be sourced to help initiate and champion projects and opportunities.
- Traditional activities give many First Nations skills that are transferable to many economic opportunities.
- The Band has a strong desire to develop their economy on their own. This independent desire can work to their advantage in that they need not rely on outsiders.
- They have access to resources which offer many opportunities for economic development.
- Their traditional territory encompasses Johnstone Strait, Robson Bight, Knights Inlet and Telegraph Cove. The area is rich in ecotourism and shellfish potential.
- Two exceptional locations include Adam and Eve River convergence (Haylahte No. 3 = 19 Ha) and Karlukwees/Turnour Island (11 Ha).

Weaknesses & Threats

- The physical assets and infrastructure are limited for the Tlowitsis. Due to a lack of infrastructure on their Reserves and lack of a viable land base, the Band members are spread throughout the Vancouver Island area. This weakness means that it is difficult to bring the community together on potential economic development projects or to keep them informed of potential projects.

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- It is difficult to assess the overall labour pool and knowledge base to draw from.
- Band membership is approximately 342 members, which does not provide a large human resource pool to draw from, when looking for champions to move projects forward.
- The Band is located over 350 km from the nearest service centre to which it has year-round road access. They essentially have no land base over which they hold ownership, to work with outside of their Reserves.
- The Band has experienced minimal success in pursuing its projects and in turn has a general cynicism regarding their potential to succeed. Failure to realize economic and business opportunities has created a level of distrust towards outside consultants and an overall dispirited feeling.
- Financial resources and physical assets are few.

Identified economic benefits of opportunities

- Opportunities offer job creation and capacity building,
- A revenue stream for the Tlowitsis,
- The potential for increased investment and business development in the manufacturing sector, and,
- Improved control over resources close to the community. This will improve management over recreation and tourism resources close to town.

Action Plans regarding Opportunities

Shellfish Farming

- Continue negotiations for foreshore leases, in conjunction with other Nations within the Tribal Council.
- As a secondary position, consider taking a 'Tlowitsis stand-alone' stance by engaging a mariculture consulting firm to take an inventory of the clams, oysters and other shellfish located on traditional beaches.
- Take advantage of the government's focus on FN aquaculture development and the trend of granting permits to FN. The consultant can assist in the negotiations as well.
- Apply for project development and implementation funding.
- Implement training programs for Band members.
- Incorporate a corporation to look after Tlowitsis interests.
- Negotiate agreements with one of several Vancouver Island depurators and product distributors.

Fresh Seafood Sales

- Carry out discussions with Municipality for licensing.
- Apply for space and permit at the harbour front from DFO and / or the Harbour Commission. Alternatively, arrange for harbour access at Discovery Marina from the Campbell River Band.

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- Carry out additional feasibility as to costs and availability / supply of product.
- Apply for project development and implementation funding.
- Develop a wholesale market to restaurants, hotels and resorts.

Karkulees

- Apply for project development and implementation funding.
- Carry out specific site location.
- Generate a Tlowitsis Tourism Strategy which would integrate Specific Opportunity Identification and Feasibility Analysis .
- Identify potential joint venture partners who will bring experience and funding to the highest priority project(s).
- Implement training programs for Band members.

Forestry/Forest License

- Apply for project development and implementation funding.
- Generate a Tlowitsis Forestry Strategy which would integrate Specific Opportunity Identification and Feasibility Analysis, including value – added opportunities.
- Engage a Forestry Consultant to design and develop a Forest License Application and a Business Plan, as required by MoF.
- Identify potential joint venture partners who will bring experience and funding to the partnership.
- Implement training programs for Band members.

Veneer Slicing Plant

- Tlowitsis already has an engineering and consulting firm engaged in this opportunity. This should be carried through to completion.
- Apply for project development and implementation funding.
- Implement training programs for Band members.

Botanical Forest Products

- Apply for project development and implementation funding.
- Take an inventory of available BFP's within Tlowitsis territories.
- Generate a Tlowitsis BFP Strategy which would integrate Specific Opportunity Identification and Feasibility Analysis, including BFP value – added products and production.
- Select the most viable product opportunities.

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- Establish working arrangements with established BFP wholesalers, producers, and distributors. This Report contains a comprehensive list of potential contacts.
- Implement training programs for Band members.

Bottled Water

- Apply for project development and implementation funding.
- Identify water inventory within Tlowitsis territories.
- Generate a Feasibility Analysis.
- Establish working arrangements with an established water bottler.

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21. Turning Point, District of Campbell River Task Force on Municipal Economic Development, October 27th, 1998

Identified opportunities

- Value-added manufacturing
- Deep water moorage facility
- Fishermen's/farmers market

Opportunity SW&T – not addressed

Identified economic benefits of opportunities

- Enhance production capacity
- Expand markets
- Overcome barriers for start-ups
- Stop outflow of natural resources
- Ecologically sustainable industry
- Create/Increased employment
- Integration of resources
- Increased revenue
- Tourist destination point
- Waterfront enhancement

Action plans regarding opportunities

- Develop value-added wood manufacturing strategy and develop coordination system
- Conduct deep water moorage facility feasibility and determine location
- Examine the benefits of a downtown market – use Tyee Plaza, Government Wharf or Esso property

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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.

This OCP does contain a section on Economic Development which outlines objectives and strategies to that end. Specific opportunities are not highlighted however the Village of Cumberland is committed to building a foundation for eco-tourism and businesses that support that. Opportunities derived from the strategies are listed below.

Identified Opportunities

- Business development based upon ecotourism that integrates ecology, education, heritage, culture and the culinary, performing and visual arts.
- Commercial activities outside the Historic Village that enhance the downtown core.
- Development of tourist services.
- Reestablish a traditional mixed-use Village centre.
- Development of regional-scaled commercial business enterprises within Cumberland that are environmentally sensitive.
- Location of a grocery store, large enough to serve Village and area residents, within the Historic Village.
- Value added manufacturing activities.

Opportunity SW&T

None noted

Identified Economic Benefits of Opportunities

None noted

Action Plans regarding opportunities

Not relevant

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Agriculture

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

Identified Opportunities

- Greenhouses
- Mushroom farms
- Berries
- Agroforestry
- Land based aquaculture
- Agri-tourism

Opportunity SW&T Strengths

- Potential local/regional demand for agricultural product also appears to be more than is currently produced
- Less than half of the agricultural land base is being actively farmed
- Growing population is demanding fresh, local product
- Valley has a favourable climate
- An active local farming community and local support

Weaknesses & Threats

- Less than 10% of the net value of the food consumed on Vancouver Island is produced on the Island
- Some individuals with the desire to farm do not have the land or capital to do so
- Availability of labour is a concern
- Others are not aware of the opportunities or how to get started
- Access to information is poor
- Costs of bringing feed, fertilizer and energy onto the Island can make it very difficult to compete with “off-Island” producers
- Lack of infrastructure
- Recent closure of agriculture research activities at the Oyster River Research Farm
- Being able to access centralized distribution systems operated by the major food retailers and wholesalers
- 80% of consumer price goes to distribution channels rather than staying with the producers in the community

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- No localized marketing infrastructure

Identified Economic Benefits of Opportunities

- The Comox Valley Farmers' Market has grown from 6 vendors to 60 in just 10 years.
- Consumers are re-assured by being able to deal directly with the people who have produced the food and who, by implication are taking direct responsibility for it.

Action Plans regarding opportunities

More detailed actions are listed under each of the following bullet points in the actual report.

- Establish an Agricultural Development Commission (ADC) as a sub-group of EDS to promote agricultural opportunities
- Improve access to and awareness of information
- Improve local marketing – multi-commodity marketing
- Reduce input costs
- Support infrastructure development
- Retain the Oyster River Research Farm – Centre for Innovation
- Market responsive marketing boards and geographic equity
- Skills development
- Food processing
- Agri-tourism

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24. <i>Fields and Forests 2000, Agroforestry Conference Evaluations and Summary Report</i>, John Watson, October 2000
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As this study is mostly a summary of the conference as opposed to a developed strategic plan with evaluated and determined opportunities and deliverables, ideas and discussion items present in the report have not been tested for plausibility. Therefore to reiterate them here would not be valid. However, a broad review of the report and general items that fit under the headings below have been listed.

Identified Opportunities

- Agroforestry and the establishment of an Agroforestry Centre in the Comox Valley

Opportunity SW&T

Strengths

- Rural economies that are heavily reliant on agricultural or forest industries can benefit from increased economic activity as a result of enhanced Agroforestry efforts

Weaknesses & Threats

- Continued decline in the processing opportunities for livestock farmers and the increased pressures on woodlot owners to achieve profit margins in a growing commodity based, global timber market

Identified Economic Benefits of Opportunities

- Diversify income
- Landowners have the tools to create new wealth and employment opportunities in the community
- Enhance productivity
- Conserve energy
- For conservation
- Create a healthy environment
- Meet people's needs

Action Plans regarding opportunities

- 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
- An island-wide agroforestry informational network and agroforestry manual
- North Island College, Malaspina College and the BC Small Woodlands program to continue to provide extension services to small landowners with forest resources on their properties
- Centre for agroforestry research, training, extension, communication and marketing – ideally located in the Comox Valley region potentially using the Oyster River Research farm.

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Aquaculture and Fisheries

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

This study is a resource use plan rather than an economic development strategy. Specific opportunities as such are not highlighted. Some opportunities have been extracted from the text of the plan.

Identified Opportunities

- Off bottom tenures in the South Denman Island planning area
- Geoducks on north Denman Island and Vancouver Island from Fanny Bay to Deep Bay
- Some expansion for new First Nations developments in the North part of Baynes Sound on Vancouver Island side

Opportunity SW&T

Strengths

- Baynes Sound is Provincially significant for shellfish culture and many shellfish farmers in the area are interested in expanding their operations
- Most shellfish culture activities present a moderate risk of negative environmental impact
- There are potential positive effects on the environment from shellfish culture including coastal stewardship, improved water quality and predation refuges

Weaknesses & Threats

- Some uncertainty exists regarding severity of certain activities due to information gaps.
- Stream channelling, beach modification and driving on the beach have potential for significant environmental impacts in some cases
- Juxtaposition of different activities and values along with shellfish aquaculture has resulted in major coastal resource use conflict

Identified Economic Benefits of Opportunities

- Aquaculture development opportunities provided by this Plan, if fully realized could represent an estimated expansion in the area from the existing 573 ha. to about 670 ha. (approximately 18%) for the foreseeable future
- Many stakeholders, highly value the economic, environmental and social benefits of the area and view Baynes Sound as critically important for their quality of life
- Baynes Sound produces approximately 50% of the Province's cultured shellfish including Pacific oysters, Manila clams and Japanese scallops

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Action Plans regarding opportunities

Actions that need to be taken before LWBC accepts applications for shellfish aquaculture for tenure expansion or new development in Baynes Sounds include:

- Review aerial photographs to screen for possible tenure infractions
- Review historic data and files to scope non-compliance issues
- Site inspections of all aquaculture tenures in Baynes Sound
- Issuance of letters by LWBC to non-compliant operators as an initial step to bringing them back into compliance
- Completion and the coming into practice of an enforceable Code of Practice for shellfish aquaculture
- Biological carrying capacity results are known
- No new tenures fronting Denman Island until zoning issues are resolved.

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

This report is for the most part focussed on the Regional District of Mount Waddington. However a small portion of the Comox-Strathcona Regional District falls within the North Island Straits. This portion is the northern part of the mainland. Details extracted for Mount Waddington are included below for reference only.

Identified Opportunities

Biophysical Attributes

- One way to reduce the risks identified would be to start with pilot or small scale operations to confirm positive biophysical attributes at selected sites and gain insight into expected growth rates and yields
- Governments have in the past granted subsidies for first entrants as a reward for generating “intelligence” to benefit those who follow

Regulatory

- The Economic Development Office of the Regional District of Mt. Waddington has developed a plan to pre-approve a suite of “Shellfish Development Areas” that it would make available to prospective shellfish aquaculture developers
- Implementing this plan requires the cooperation of a minimum of the agencies cited

Financial/Capital

- Expansion/re-location of an existing operator would be less risky than a start-up by a new operator
- Business strategies to shorten the lag between investment and returns would improve the profile of the venture

Human Resources – Entrepreneurs

- Expansion/re-location of existing operators may provide the “push”
- Shellfish farming may be a good fit for ex-fishermen or under-employed fishermen given their skills, assets, lifestyles and expected incomes

Human Resources – Farm Operations Crew

- Many un-employed or under-employed persons have highly transferable skills

Human Resources – Training

- Collectively, Malaspina College and NI College are capable of delivering specific training programs for both husbandry and processing functions

Shellfish Aquaculture Operations

- Explore non-traditional species where biophysical characteristics of the NIS study area may prove advantageous

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- The potential for larger farms in the NIS Study Area, compared to established areas, may offset possible yield disadvantages

Transportation

- Availability of trucks to transport supplies and finished product is not an issue. The area is already a hub of activity for offloaded wild seafood and processed farmed salmon.

Processing/Marketing

- Keltic Seafoods is interested in custom processing shellfish and is willing to invest in Certification and employee training
- Alpha and Omega may have surplus cold storage space becoming available that could accommodate small start-up volumes of shellfish aquaculture product
- Unloading operations such as Cove Fish are seeking expansion/diversification opportunities
- There is strong likelihood that shellfish production could be handled, if not marketed by local firms

Opportunity SW&T Strengths

- Biophysical attributes of the NIS Study Area are likely to be attractive and much of the required infrastructure is in place
- 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
- The availability of numerous and sizeable inter-tidal and sub-tidal sites with strong biophysical potential for shellfish aquaculture
- A need, a desire, and the energy to develop economic and employment engines in the NIS Region
- Generally strong worldwide markets for seafood in general and shellfish in particular

Weaknesses & Threats

Biophysical Attributes

- Specific attributes of potential sites are unknown
- There is a “learning curve” associated with every site, as the operator becomes familiar with local conditions
- Productivities, yields and such vary with the experience and knowledge of operators and biophysical parameters vary across sites

Regulatory

- The tenure process is extremely slow, expensive, and frustrating for applicants
- For some, inability to secure tenure is a “deal-breaker”; it saps the entrepreneurial spirit
- Various levels of government compound the problem

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- Currently there are no facilities for water quality testing

Financial/Capital

- Nature of shellfish aquaculture – upfront and ongoing investment, no cash flow for 2+ years
- No ability to service debt until first “crop” harvested
- Substantial risk – uncertain yields, volumes and values
- Security problematic
- A speculative enterprise for first few years
- Points to large equity investment

Human Resources – Entrepreneurs

- There appears to be few individuals/small businesses in the NIS Study area with a passion to enter the business
- Shellfish farming is typically labour intensive and returns are modest.
- Few individuals/small businesses have the wherewithal to fund a start-up farm

Human Resources – Farm Operations Crew

- Potential farm sites tend to be well-removed from population centres implying travel time via small vessels
- Wages may be modest when compared to traditional fishing, forestry and mining wage levels
- Year-round farm jobs may conflict with other seasonal activities
- NIS Study Area residents lack direct shell-fish aquaculture experience

Human Resources – Training

- Few residents of the NIS Study area are currently trained in shellfish husbandry practices
- Few plant employees are currently skilled in shellfish handling
- Broader business skills are also a prerequisite
- Much of the required knowledge base derives from “working the grounds” and cannot be gained in the classroom

Shellfish Aquaculture Operations

- The learning curve associated with Greenfield operations create an initial competitive disadvantage relative to established operators
- Productivity of the grounds in the NIS Study Area is uncertain
- Remoteness means some level of ongoing cost disadvantage for shellfish aquaculture operations in the study area

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Transportation

- NIS operations will bear additional trucking costs compared to mid or south Island operations
- Incremental transport costs apply to both supplies/inputs and shipping of finished product.

Processing/Marketing

- There are currently no major processors in the NIS Study Area engaged in the shellfish aquaculture business. No firms canvassed have an immediate interest in taking a position in shellfish processing/marketing. Some processors in other location are reported to be reluctant to take on new production

Identified economic benefits of opportunities – none in particular noted

Action Plans regarding Opportunities

Production-oriented approach

- Identify target species
- Identify sites with best potential
- Obtain tenure rights to sites
- Secure financing to commence operations
- Ensure trained/qualified personnel to run the operation
- Establish farm operation – seed, grow, harvest
- Secure processor to purchase/market product

Market-driven Approach

- Begin with objective market research and analysis – seek out legitimate market opportunities
- Devise a marketing plan to exploit identified opportunities:
 - Marketing plan includes products, target markets, distribution strategies, pricing, branding, promotion
 - The outcome of a marketing plan should be a revenue forecast based on projected sales volumes and prices
- Tailor a production plan to fulfil the marketing plan
 - Identify sources of production
 - Estimate cost of production
 - Evaluate associated administration, sales and overhead costs
- Assess capital requirements to fund the venture
- Confirm viability through conservative financial projections
- Secure financing, based on a sound market, production and financial plan

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<p>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</p>
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Identified Opportunities

Salmon Fisheries

- Populations of low abundance not meeting Section 35 needs require special actions to keep the sport and commercial fisheries from targeting those populations
- Emphasis on rebuilding community action to resolve situations where elders and others cannot meet Section 35 salmon needs
- Allocate high value Section 35 fish (Chinook and Coho) to provide opportunities associated with Native recreational fishery initiatives

Commercial Salmon Harvesting and Processing

- Increased direct employment as fishermen
- Increased indirect employment as tendermen, shore workers, service industries
- Increasing the number of licenses owned by Natives and/or FN organizations
- Negotiating agreements and partnerships with fleet owners to ensure continued Native employment in company fleets
- Negotiating agreement and partnerships with fleet owners to provide them trained and certified Native crew skippers
- Organizing Native commercial fishermen to provide a collective voice and communications on commercial fishing issues
- Providing training and assistance program to make Native fishermen more competitive
- Providing a self-help or “do-it-yourself” vessel and gear maintenance program to help maintain and upgrade both Native owned vessels and Native maintenance knowledge and skills
- Negotiating with DFO, DIAND and BC on changing communal fishing licences to local quota
- Negotiating with Government to commit to increase the AFS ATP funding to buy more licences for Native communities
- Securing an agreement with government to help FN take over more contract work related to stock rebuilding and local management

Herring Fisheries and Commercial Harvesting and Processing

- Same opportunities as Commercial Salmon Harvesting and Processing above

Ground Fish Fisheries and Commercial Harvesting and Processing

- Prime opportunity for FN commercial ground fish fisheries is coastal and outside the Georgia Strait area. This could be especially important in the Central Coast and Queen Charlotte Islands area where there are few other economic opportunities and strong local ground fish stocks

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- FN to get ground fish licences and quota to be able to participate in commercial fisheries
- Section 35 protected areas
- Increasing amounts of rockfish and other species are being sold alive requiring special holding and handling facilities and packaging but no processing in the usual sense which could be a local opportunity

Shellfish Fisheries and Harvesting and Processing

- Create special protected areas to ensure that Section 35 needs can be met
- First Nation owned and operated shellfish aquaculture operations
- Hiring by non-Native shellfish aquaculture operations
- Indirect employment in providing services ranging from professional and technical advice through to transportation of product, personnel and supplies on FN vessels
- Joint Venturing
- Shellfish depuration services and for actual processing of catch as in peeling shrimp, shucking oysters or crabs and packaging product

Recreational Fishery (ideally under tourism)

- Long term opportunities – ownership or joint ventures with regard to lodges and resorts, guiding, outfitting, equipment supply and providing transportation services

Other Marine Species Uses

- Oolichan – employment opportunities related to management of stocks
- Mammals – tourism based viewing
- Marine Birds – tourism based viewing
- Marine Plants – specialty herbal/medicinal products

Opportunity SW&T

Salmon Fisheries: Threats

- Commercial and recreational fisheries operate in outer coastal areas to intercept salmon stocks well before they reach their spawning rivers
- If economic situation for Natives does not improve, the catch will increase to help meet dietary needs.
- Sport fishery has been fishing on stocks where abundance has not been high enough to safely meet Section 35 needs and maintain spawning populations

Commercial Salmon Harvesting and Processing: Strengths

- Fresh fish and specialty products processing is much more decentralized and involves small companies
- Opportunities would be dependent on a captive supply of low cost and/or high value product and/or a specialty product with considerable demand.

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Weaknesses

- To compete effectively requires skill, competitive fishing vessel, gear and equipment and luck
- The amount of fish available to catch is highly variable as are the prices paid
- Salmon fishery is managed as a risky venture
- Salmon canning and freezing is highly centralized primarily in Prince Rupert and Vancouver

Herring Fisheries and Commercial Harvesting and Processing: Strengths

- The SOK fishery tends to be more consistent in local areas through time
- Herring is an important bait for the sport fishery

Threats

- Fleet is heavily capitalized for competition and is difficult to manage – there is a tendency to catch over quota
- It is anticipated that popping machines may displace hand labour
- Concern about increasing supply of SOK would flood the market and depress prices, also a concern about kelp supply in some areas

Ground Fish Fisheries and Commercial Harvesting and Processing: Threats

- Intensive harvesting makes it impossible for FN to meet their Section 35 needs unless they are able to travel to an area where there are more fish
- The commercial sport fishery is over-fishing some accessible areas when bad weather prevents fishing salmon
- Native owned licences have dropped substantially
- Limited entry licensing minimum catch requirement exclude many Native fishermen
- Ground fish processing is done centrally near an urban centre either close to transportation or market

Shellfish Fisheries and Harvesting and Processing: Threats

- Sewage, industrial pollution and red tides are affecting shellfish availability for harvesting and safety for consumption
- Aquaculture of salmon and shellfish is also writing-off areas of wild shellfish production
- Most shellfish fisheries have limited entry licensing and many are now on quotas

Recreational Fishery (ideally under tourism): Weaknesses

- Sport fishing businesses tend to spend very little in the local area, instead bringing food and supplies from urban areas and feeding guests on local seafood

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Threats

- With the recent decreased salmon abundance the private, non-industry involvement in the sport fishery has decreased but is expected to increase as stocks rebuild
- With more than 267,000 anglers, the ocean sport fishery can have significant impacts on stocks

Other Marine Species Uses: Strengths

- Mammals are protected and are an important tourism viewing resource
- There is a broad array of marine plants in BC coastal waters

Threats

- Since 1994, Oolichan stocks have been very low due to by-catch in trawl fisheries and habitat damage
- Seal populations are growing rapidly with no harvesting

Identified economic benefits of opportunities

- If opportunities are addressed there would be an overall increase in employment and food stock and in turn quality of living would increase

Recreational Fisheries

- Estimated revenues from recreational fisheries in BC were \$661 million in 1999. They provided 6700 seasonal jobs
- New businesses are continually being started

Action Plans regarding opportunities

Salmon Fisheries

- Agree to work out local fisheries management arrangements to ensure that commercial and sport fisheries on the Section 35 salmon stocks are reduced and limited if appropriate
- Government should work with FN to ensure that there are mechanisms in place to meet elders Section 35 needs
- An expanded CEDP program is proposed specifically to rebuild salmon populations that FN are dependent on to meet their Section 35 needs
- Assess the opportunities and policy constraints to utilizing Section 35 catch allocations for recreational fishery purposes

Commercial Salmon Harvesting and Processing

- Protect existing Native holdings in the commercial salmon fisheries
- Increase the related employment and responsibilities by establishing a long-term program for training, mentoring and progress transfer

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- Undertake a FN collective action to press government to offer an alternative to the industrial solution for treaty settlements
- Increase the number of communal licences and convert from competitive licences to quotas
- Develop and implement a CEDP-like program for fisheries and habitat management
- Develop a FN coastal zone economic development program focused on community based processing and associated marketing strategy

Herring Fisheries and Commercial Harvesting and Processing

- Undertake a FN collective action to press government to offer an alternative to the industrial solution for treaty settlements
- Protect existing Native fleet by providing access to financial assistance (NFA) and help to improve competitiveness
- Increase the number of communal licences, allow transfer of Native owned licences to Native community ownership, and convert from competitive licences to quotas
- Increase related employment and responsibilities by establishing a long-term program for training, mentoring and progress transfer
- Conduct a coast-wide assessment of the opportunities related to FN bait sales to the recreational fishery

Ground Fish Fisheries and Commercial Harvesting and Processing

- Establish NBBC facilitated FN ground fish working groups
- ATP actions to increase ground fish licences for FN in interim settlements
- Establish two types of protected areas for conserving ground fish and for Section 35 fisheries
- Establish the framework and resourcing for a FN ground fish resources inventory, monitoring and long-term planning for their local resources
- Recognize that if some progress is not made on this issue FN are likely to initiate direct action to get their needs met

Shellfish Fisheries and Harvesting and Processing

- NBBC facilitated profession study is required under FN control and direction to provide an analysis of and assessment of the potential opportunities and related benefits and costs of a coordinated FN coastal zone shellfish restoration and economic development strategy
- Increasing the AFS ATP program funding, increasing acquisition of shellfish licenses and changing the licence acquisition process
- Change in government policy on issuance of new permits and licenses

Recreational Fisheries

- Ensure that sport fishing is not encroaching on conservation, stock rebuilding and Section 35 needs

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- Encourage sport fishing businesses to spend and hire locally
- Change government policy to provide new sport fishing lodge permits to FN
- Help Natives to implement training and development arrangements to capitalize on permits
- Institute a joint program with industry to train and place Natives in sport fishing businesses and to start their own sport fishing and tourism businesses
- Prepare a well designed professional study, under FN control and direction, to provide an analysis and assessment of the wide range of opportunities potentially available to FN associated with the recreational fishing industry
- The preceding will be utilized to prepare a proposal to the Province outlining the recreational fishery as a priority sector and to identify the means through which FN and provincial recreational industry objectives can be met
- Conduct a facilitated workshop to provide an opportunity for dialogue amongst FN regarding recreational fisheries issues and concerns etc.
- Use these results to provide recommendations and next steps

Other Marine Species Uses

- Mount a coordinated program to learn more about Oolichan survival factors and to provide a basis for management
- Utilize thee recommendations of the NBBC facilitated Oolichan Workshop as the basis to move forward toward a coast-wide coordinated Oolichan strategy within which FN will play a major role
- Make a formal request to government to make the Oolichan fishery exclusively a Section 35 fishery
- Hold a NBBC facilitated workshop on marine mammal viewing and related opportunities for Natives in the tourism business or those aspiring to enter it
- Inform governments of the intent to own a fair share of the marine mammal viewing businesses to ensure licensing opportunities are protected
- Conduct a focused review and assessment of the opportunities for FN associated with marine plants

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<p>28. <i>Profile and Potential of the BC Shellfish Aquaculture Industry 2002</i>, Salmon, R. and B. Kingzett, 2002</p>
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Full report unavailable.

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.

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

As the title indicates, this report is an analysis of the shellfish industry. Specific opportunities are not discussed. Detailed economic impacts of the industry are discussed to such a degree that to summarize them here other than the summary below, would be without value.

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 creation of 530 jobs on the West and North Coasts of Vancouver Island.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

Identified Opportunities

- Innovative product development, new fisheries and sustainable initiatives

Opportunity SW&T

Strengths

- First Nations' have had an important involvement in the commercial salmon industry totally more than 1,000 commercial licenses
- First Nations participation in some fisheries such as salmon and herring spawn-on-kelp is also high
- New fisheries and aquaculture present new opportunities for First Nations
- Many First Nations are becoming involved in shellfish aquaculture
- Treaties have the potential to profoundly impact management
- BC seafood is considered among the safest in the world
- Trend toward eco-labelling of seafood
- BC industry has gained access to the Australian market for salmon and the Japanese market for oysters

Weaknesses & Threats

- Industry as a whole faces many challenges
- Salmon farming is a controversial industry in BC
- Tariff and non-tariff trade barriers continue to affect the BC seafood industry
- BC industry remains effectively shut out of the US market for cold smoked salmon

Identified economic benefits of Opportunities

- Total exports of BC seafood products was \$903 million in 2000
- Direct jobs involved in primary aquaculture production are now close to 2,000

Action Plans regarding opportunities

None noted

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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*

Identified Opportunities

Wind

- Many areas on VI have a good wind resource potential, with a predicted annual average wind speed of 6 to 8 metres per second (m/s).

Small Hydro

- Potential projects range in size from 500 kW to about 18 MW and they are located throughout VI.

Landfill, Gas, Refuse and Wood Residue

- On VI, there are several possible locations for LFG (landfill gas) recovery and power generation.
- VI pulp mills to meet a portion of their energy needs have used power generation from sawmill residues for decades.

Wave

- The results of this study indicate that the west coast of VI has an excellent wave energy resource with approximately 8.25 GW of wave power incident on the western VI.

Opportunity SW&T

Strengths

- It is possible to directly generate power utilizing sorted municipal refuse.
- Several B.C. based companies are developing wood residue gasification technologies that could significantly lower the cost of power generation at relatively small scales.

Weaknesses & Threats

- Potential issues and challenges that will be faced in the development of wind energy on VI are related to the remote locations and ruggedness of the terrain.
- The opportunity to expand sawmill residue power production is significantly limited by wood residue availability from coastal sawmills
- Some green energy resources, such as wind and wave, are intermittent and provide little or no dependable capacity.

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- VI green 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.

Identified economic benefits of opportunities – none noted

Action Plans regarding Opportunities

- Further examination of the storage/capacity opportunities is required if a complete analysis is to be conducted.

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32. <i>Small Hydro and Wood Waste Power Development Opportunities, Preliminary Feasibility and Market Analysis</i>, Willis Energy Services Ltd., 2001
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Full report unavailable.

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.

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Forestry

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

Identified Opportunities

- Forestry Contracting
- Bute Development G.I.S. Contracting Company
- Value-added Wood Processing
- Parks Management

Opportunity SW&T

Strengths

- The G.I.S. group have achieved a high level of success
- HFN has been operating a Silviculture Crew for the past three years, specializing in spacing, pruning, thinning, and planting
- Operating at a 98% success rate on the surveys
- Increased access to the forest land base as a result of partnerships with Interfor
- 2 members who are carpenters and 4 members who are proficient in carving

Weaknesses & Threats

- A (125 Band members) population with limited education
- Poor to negligible work history in forest operations

Identified Economic Benefits of Opportunities

- Increased involvement in traditional territory, by obtaining contractual work and revenue;
- 1 Job for 80 days to develop business contracts for G.I.S.;
- 6 Jobs for 120 days for forestry ;
- Work experience for 6 workers in silviculture, which will be essential when demonstrating experience for future contracts with BC Hydro and other resource agencies;
- Increase work experience in business development, which will be required when building other business initiatives within the community;
- Potential business profits, which can be used to re-invest in other business development initiatives or social programs;
- Computer equipment and technical team will be used for all further projects.
- Partnership with Interfor which can lead to other contracts and co-management of the area occupied by Interfor within the traditional territory;

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- Potential business profits which can be used to spread the start up costs over 4 forestry related projects

Action Plans regarding opportunities

Bute G.I.S. Contracting

- Begin contract procurement with the assistance of one Band member
- Initiate business relationship with Ministry of Forest, Mapping Department in Campbell River and the Sunshine Coast

Value-added

- Information Gathering
- Community Consultation Workshop
- Market Research Study
- Investigation of Funding and Partnership Opportunities
- Feasibility Study of Commercial Operations
- Business Plan
- Implementation

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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.

Given that the strategy concluded that relocation is not reasonable, feasible or viable, detailing opportunities, their SW&T, benefits and action plans are not relevant.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

Identified Opportunities

- Specialty Wood Drying
- Pre-fabricated Housing
- Solid Wood Furniture
- Ready to assemble Garden Furniture
- Solid Wood Strip and Plank Flooring
- Prefabricated Stair and Handrail Components
- Window Sash and Door
- Specialty Wood Products
- Non-Timber Forest Activities – Recreation and NTFPs

Opportunity SW&T Strengths

- For small companies, the SBFEP sales allowed access to fibre thus allowing them access to financing that was previously hard to acquire without a solid fibre source
- Proximity to water access benefits the development of a prefab facility reducing costs of shipping
- Skill base in CR is conducive to prefab housing
- Solid wood floors however, are finding growing interest in renovation applications and for their health related benefits
- Hemlock is a predominant species in the Sayward area and is well suited for paint grade handrail components
- Specialty doors with carved First Nation motifs appear to match up well with the return to traditional style homes. Fibre supply and potential carvers are found in the study area
- Strong markets for log homes have been developing in Japan, Korea and Europe and the market for timber frame homes has made a strong revival in North America.

Weaknesses & Threats

- Cost-related issues – stumpage, capital tax, regulation
- Business certainty – land claims, labour issues, land use decisions
- Industry setting – market outlook
- Concern over affordable fibre access
- Concerns over financing
- Lack of pressure treating facility in the region

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- Lack of export market knowledge
- Lack of developed container handling facility on Vancouver Island
- Lack of skilled labour with strong joinery and woodworking background
- Market for solid wood flooring is coming under increasing competition from tile and wood-laminated flooring
- The market for prefabricated stair systems is a highly specialized field requiring skilled craftsmen.
- Cost effective transportation off Vancouver Island could restrict the potential market to Island customers only
- Considerable competition for log home building in the Mid-Island region.
- Finding suitably priced industrial space could be an issue

Identified Economic Benefits of Opportunities

- Expansion of drying capabilities will also assist development of other opportunities, such as prefabricated housing, stair components, wooden windows and door manufacturing along with cabinets and furniture manufacturing
- Small scale opportunities can provide more jobs per cubic metre than larger operations
- Canadian furniture making industry has now become internationally competitive. The most recent data suggests that the Canadian furniture industry employs close to 20,000 individuals with shipments nearing \$2 billion. BC has 9.0% of all furniture establishments

Action Plans regarding opportunities

Detailed action plans are listed under the following main strategies:

- Development of a feasibility study to review the potential for an appropriately scaled RFV system (kiln) should be carried out
- Monitor and improve local access to timber supply
- Assist in expanding local log market for locally produced logs
- Ensure marine access for logs and logging service companies
- Encourage Licensees to expand, modernize and locate
- Help reduce costs for existing shake and shingle mills
- Encourage investment in secondary wood manufacturing and service
- Be proactive in maintaining health of 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

The purpose of this study was to provide the municipality, landowners and prospective investors with a number of snapshots on how sites could be developed and prepared as a colony. As such, it does not address business opportunities specifically, except at the higher level of locating a site so that opportunities can be realized.

Identified opportunities

- Industrial site for the relocating of existing secondary manufacturing business and establishment of new businesses such as: primary breakdown, re-manufacturing, kiln drying, heavy duty equipment work shop

Opportunity SW&T Strengths

- Moves existing businesses out of the estuary which can then be converted to tourism and recreation uses

Weaknesses & Threats

- Finding adequate location for relocation and necessary financing has been an issue

Identified economic benefits of opportunities

- New forest sector jobs
- New forest business start-ups and expansions
- Leveraged forest sector investment in Campbell River
- Businesses operating in close proximity can share services, and reduce material handling and transportation distances, resulting in reduced costs for each of the businesses

Action plans regarding opportunities

This project is on going and as of yet, unrealized. As such, the action plans included in reference to client development, which are largely follow-up items from six years ago, are likely dated and will not be reiterated here.

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

Identified opportunities

- Menzies Bay as an industrial site for the relocating of existing secondary manufacturing business and establishment of new businesses such as: primary breakdown, re-manufacturing, kiln drying, heavy duty equipment work shop

Opportunity SW&T

Strengths

- Three sites were identified with Menzies Bay being selected as the primary location due to the proximity of raw material supply, shipping terminal, by-products loading and log handling
- MacMillan Bloedel Ltd. are receptive to having a colony at this site in conjunction with their new works
- Proximity to highway and access to waterfront
- Raw material supply and handling available
- Products produced can be barged directly to a deep sea loading facility

Weaknesses & Threats

- Relocating of cedar mills requires the consideration of limiting the amount of handling
- Current water supply is not considered adequate for a large colony
- New sanitary sewer infrastructure will be required
- All the land will have to removed from the ALR
- Colony ownership issues
- A plantation lease exists on the study site
- Timely approvals can be problematic

Identified economic benefits of opportunities

- Businesses operating in close proximity can share services, and reduce material handling and transportation distances, resulting in reduced costs for each of the businesses

Action plans regarding opportunities

- Work with MB and the Regional District of Comox-Strathcona to change the permitted land use to suit colony needs

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- Resolve the water supply and sewage disposal issues
- Identify a comprehensive developer and clients for the colony
- Work with MB to resolve the plantation issue
- Subdivide incrementally
- Streamline the approval process for potential operators
- Obtain a Memorandum of Understanding from key landowners
- Obtain phased funding agreement to facilitate the colony development over the next two years

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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

Full report unavailable.

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:

- a plan to develop an infrastructure that will build a climate to support and sustain entrepreneurial activity in the region;
- a plan to seek potential funding partners;
- a timber supply profile; and
- 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
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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.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action Plans regarding opportunities

The report recommends proceeding with a detailed site analysis, a site development and a business plan for the proposed industrial lands.

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

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.

The main intent of this study was to develop strategies that might strengthen the local forest based economy. Opportunities assessed were not specific to business opportunities but covered the range of operational, administrative and organizational opportunities, i.e. things that need to get done. Some specific opportunities were listed and rated. Only those business opportunities that scored well in the prioritization criteria rating are listed here.

Identified Opportunities

- Log Sort/Yards
- Master Artisan Guild – Marketing
- Silviculture support opportunities

Opportunity SW&T

Weaknesses & Threats

- Access to fibre
- Coordinated marketing
- Available capital
- Regulatory issues
- Little product diversity
- Cross-communication

Identified Economic Benefits of Opportunities

None noted

Action Plans regarding opportunities

None noted

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41. <i>Comox Valley Forest Enterprise Implementation</i>, 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.

Identified Opportunities

- Value-added Village
- Woodlot Co-operative
- Outdoor/adventure Network
- Furniture Producers/Marketing Network

Opportunity SW&T

- Networks focus energies and pool resources better than each doing it on their own

Weaknesses & Threats

- The timber supply analysis for the Strathcona TSA (Timber Supply Area) of 1994 suggests a reduction in yield of 40% within the next 40 years.
- The focus of harvesting will shift from west coast to east coast, where most second growth stands are. This suggests a reduction in the quality of the harvest.
- Traditional domestic and foreign markets are obtaining their needed forest products from other sources; like the Baltics where exports have increased from zero to 2.5 million cubic meters in three years or Scandinavian countries capturing the markets in Japan.
- Focus on commodity products for export is being challenged by cheap commodities from a number of new participants in the global market place.
- The quota system in the USA is also constraining the commodity markets with one of the biggest trading partners, and allowing imports from Scandinavia (no quota) to compete for those markets.
- Current and potential products of the value added sector require access to markets beyond the capacity of local marketplaces in order to enhance the viability of various businesses.

Identified Economic Benefits of Opportunities

- 74% of job growth is in the small and micro-business areas.

Action Plans regarding opportunities

- Expand forest co-operative to embrace other participants
- Various knowledge transfer strategies, including:
 - a.) A directory of local resources
 - b.) Public notification re Forest Resource Room at Economic Development office

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- c.) Creation of an industry sector newsletter
- Inventorying existing resources of;-
 - a.) Education and training opportunities
 - b.) Business expertise that is available
- Establishing networking systems
- Coordinating marketing efforts through:
 - a.) Pooled marketing
 - b.) Establishment of a Central Marketing Agency

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<p>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</p>

Full report unavailable.

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.

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

Full report unavailable.

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.

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<p>44. <i>An Ecosystem-Based Assessment of Denman Island</i>, Silva Ecosystem Consultants Ltd., 1998</p>

An eco-system based assessment identifies the ecological components, structures, processes and flows that are required to maintain fully functioning ecosystems at all scales.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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45. <i>First Nations of the Kwakwaka'wakw: Gaining Ground in the Forest Sector - An Economic Opportunities Study</i>, Shawn Morford, 1998
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Full report unavailable.

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.

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

Identified Opportunities

Value Added Wood Village Concept

- Custom Sawmilling
- Specialty Wood Drying
- Furniture – home office furniture, unique, lighter-toned and smaller-scale furniture designed for the townhouse and condo lifestyle and ready to assemble furniture that incorporates easy to use and innovative assembly systems
- Solid Wood Strip and Plank Flooring
- Prefabricated Stair and Handrail Components
- Window Sash and Door
- Log and Timber Frame
- Specialty Wood Products
- Wood Waste Products – Ethanol Production Plant
- Prefab Housing
- Shake and Shingle

Opportunity SW&T Strengths

- Quantities of high-grade cedar and fir salvage wood are available in cants.
- For small companies the SBFEP sales allowed access to fibre thus allowing them access to financing that was previously hard to acquire without a solid fibre source.
- Two woodlot parcels W1680 and W1681 were to be made available to the Sayward Valley.
- Solid wood floors are finding growing interest in renovation applications and for their health related benefits.
- Hemlock is a predominant species in the Sayward area and is well suited for paint grade handrail components.
- Specialty doors with carved First Nation motifs appear to match up well with the return to traditional style homes. Fibre supply and potential carvers are found in the study area
- Strong markets for log homes have been developing in Japan, Korea and Europe and the market for timber frame homes has made a strong revival in North America

Weaknesses & Threats

- Cost of logging, foreign competition and a poorer quality of wood
- Coastal B.C. is by far the highest cost producer of fibre in the world
- Lack of agreement on the Softwood Lumber issues with the U.S. has had a major impact on the Coastal Forestry industry

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- There are currently no kilns available in the Sayward area
- Unable to identify any major businesses willing to undertake furniture development
- Concern over affordable fibre access
- Concerns over financing
- Lack of pressure treating facility in the region
- Lack of export market knowledge
- Lack of developed container handling facility on Vancouver Island
- Lack of skilled labour with strong joinery and woodworking background
- Market for solid wood flooring is coming under increasing competition from tile and wood-laminated flooring
- The market for prefabricated stair systems is a highly specialized field requiring skilled craftsmen.
- Cost effective transportation off Vancouver Island could restrict the potential market to Island customers only

Identified Economic Benefits of Opportunities

- Small mills are economical on high quality, high value wood
- Two band saw millers from down Island would like to locate to the Sayward area as they are already working salvage sales in the area
- Expansion of drying capabilities will also assist development of other opportunities, such as prefabricated housing, stair components, wooden windows and door manufacturing along with cabinets and furniture manufacturing
- Canadian furniture making industry has now become internationally competitive. The most recent data suggests that the Canadian furniture industry employs close to 20,000 individuals with shipments nearing \$2 billion. BC has 9.0% of all furniture establishments

Action Plans regarding opportunities

- Fibre Supply
 - a) Work with logging contractors bidding on SBFEP sales to de-water and sort at Sayward and thus ensuring fibre supply for the Value Added Village.
 - b) Make application to the Ministry of Forests for the development of the local woodlots.
 - c) Negotiate with the Hamatla Treaty Society to entertain possible joint ventures.
- Value Added Village Concept

Work with local firms and individuals to establish businesses that can work with the Value Added Village Concept and advertise to attract business from outside that may be interested in participating in some of the building blocks of the Value Added Concept.

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- Financing

Establish potential sources of funding for community businesses either through direct loans, grants, Community Futures, Business Development Bank or others.

- Job Training

Discuss with HRDC the opportunities that may be available for the various businesses wanting to set up a Value Added Wood business. Discuss with First Nations possible joint ventures in job training.

- Marine Access

Work with Weyerhaeuser to secure waterfront access for de-watering, barge loading and unloading facilities.

- Hemlock And Balsam

Continue to work on methods of utilizing hemlock and balsam in the Value Added products line. Work closely with B.C. Wood in establishing a kiln drying system that would work effectively for the drying of the above. Continue to work with B.C. Wood and Industry Canada in the development of hemlock and balsam products.

- Shake And Shingle

One of the objectives could be the establishment of a shingle mill in the Sayward area, possibly at the Value Added Village.

- Log And Timber Frame House Building

Local contractor Mark Johnson, who is already skilled in log and timber house building, has advised that he would like to establish a log and timber frame house building business here.

- Prefab Housing

Additional research is required and is currently ongoing to develop this industry within the Sayward valley.

- Land Use Decisions

As various groups are focusing on the removal of much of the forest from logging, it would be in the community's vested interest to maintain a direct link to the land use decision making process.

- Marketing of Value Added Wood Products

B.C. Wood has set up as a group to promote the use of B.C. Wood Products in the global market.

- Ethanol Plant

The development of an ethanol plant along with its many by-products for Sayward should be continued with representations to Weyerhaeuser regarding the possible use of the existing Kelsey Bay sort area.

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47. <i>Forests and the Future of Work</i>, The Communities Institute, 1998

The purpose of the project was to facilitate the understanding within communities of transitions taking place in the region's forest economy. The principal objective of this project was to develop and document a "community model approach" to managing transition through the application of a comprehensive consultation process with key individuals and organizations, including forest workers, First Nations, industry, labour and local government.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

Identified Opportunities

- Forest products manufacturing /value-added – primary processing and further processing
- Selective harvesting and commercial thinning - three areas of harvesting offer some limited opportunities in the short to long term — partial cutting, commercial thinning and “pre-salvaging”
- Silviculture as per FRBC projects
- Watershed restoration – as per FRBC projects
- Resource inventory – as per FRBC projects
- Forestry-related tourism - Spas and Holistic Experiences, Education and Natural History, Ecotourism, North Coast Trail — Port Hardy, North Coast Trail — First Nations, Cormorant Island Recreation Trail
- Botanical forest products - There is significant market potential, particularly in areas of floral greenery, mushrooms, crafts, native plants and wild, natural food products

Opportunity SW&T

General

Weaknesses & Threats

- The communities of the North Island do not have a unified vision of the future, or a cohesive approach to achieving greater economic self-sufficiency.
- The North Island is still resource sector dependent.
- Wood supply on the North Island is tight.
- The North Island needs a dry kiln.
- The resources of wood processing operators on the North Island are stretched.
- Red tape is making timber harvesting slower and more costly.
- The need for training has never been greater.
- Training facilities on the North Island do not appear to meet local needs.
- There appears to be a relatively poor understanding among operators of the North Island of how the apportionment system for the Kingcome TSA works
- The recent introduction of the provincial Jobs and Timber Accord has raised industry concerns about union members being given priority for jobs created by Forest Renewal BC (FRBC) spending, for example intensive silviculture or watershed restoration.
- The relationships between the companies and the powerful International Woodworkers Association (IWA) are not ideal.
- Coordination of Forest Industry and Fisheries.

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Forest Products Manufacturing

Weaknesses & Threats

- Wood Supply
- Transportation Costs
- Investment Climate

Harvesting

Weaknesses & Threats

Partial Cutting:

- Ecology: Selective harvesting could leave a coastal timber stand, which is dominated by hemlock, more susceptible to dwarf mistletoe. In the long term this would result in degraded, infected trees;
- Safety: Felling individual, large trees in old growth forests and on mountainous terrain is dangerous;
- Economics: Harvesting large logs must often be done with costly systems such as helicopters or with skyline systems, which may not be economically feasible;
- Wind effects: If a timber stand is opened up by partial cutting, it is more vulnerable to wind damage.

Commercial Thinning:-

- It is still relatively untested, and most of the licensees are cautious about investing in this type of harvesting system.
- There is some disagreement between industry and the Ministry of Forests regarding whether or not commercial thinning activity should be included as part of a licensee's AAC.
- The market for commercial thinnings is cyclical, moving with the price of pulp, and this is a major factor in the decision to adopt or delay the use of commercial thinning. Demand is presently down.
- The Port McNeill Forest District does not apportion commercial thinnings to SBFEP licensees, as in the Campbell River Forest District, due to the relatively small supply of second growth in the appropriate age category.

Silviculture

Weaknesses & Threats

- Humidity and lack of sunshine both preclude seedling nurseries from developing on the North Island.

Watershed Restoration

Weaknesses & Threats

- Assessment and prescription work on the TFLs of the North Island is largely carried out by consultants or contractors from outside the North Island because of the Region's small pool of technical and engineering expertise.

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- In attempting to develop projects with a labour force from such diverse backgrounds as fisheries and logging, some constraints stemming from historical differences have arisen.

Resource Inventory

Weaknesses & Threats

- As in watershed restoration, the North Island does not have a sufficiently large skilled pool of talent to meet the technical requirements of resource inventory work.

Tourism

Weaknesses & Threats

- Potential conflict exists between using the land for recreational outdoor use/tourism or forest harvesting.
- It is a commonly held view on the North Island that tourism generates only seasonal and low-paying occupations.
- A lack of services, limited high end accommodations, and a shortage of accommodations generally all serve to dampen tourism growth on the North Island.
- The tourism “products” of the North Island are still underdeveloped in comparison to other parts of the province, and North America.

Botanical Forest Products

Weaknesses & Threats

- Currently, there is a lack of regulation and lack of botanical perspective in forest policies and practices. There is also a lack of coordination with harvesters.

Identified economic benefits of opportunities

Forest Products Manufacturing

- Significant indirect impacts in service sector, including truck and helicopter transportation, suppliers, repairs, etc.
- Would also be re-spending effects in local communities.

Harvesting

- Significant, as it would maintain forestry-based employment and income regionally.
- Significant in short term, as it would maintain forestry-based employment and income. High in long term.

Silviculture

- Incomes will be higher than they have been in the past 20 years if jobs go to I.W.A. workers.

Tourism

- With strategic action, economic support could come into play for additional coordination of all tourism activities.
- Downstream ten years or so, tourism activity will play a much larger role in the North Island economy.

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Botanical Forest Products

- All economic benefit would accrue to North Island. Amounts unknown, but enough to create few permanent, as well as several seasonal jobs and bring cash into the economy.

Action Plans regarding Opportunities

Forest Products Manufacturing

- The means should be developed to secure the necessary timber supply to foster the North Island wood processing sector.
- While competition is a necessary and healthy component of the wood manufacturing industry, the North Island producers will benefit from pooling their resources, skills and information.
- The North Island Consortium should continue to seek out funding for a dry kiln to serve the northern producers.
- Assist licensees to test and evaluate new or improved technology.
- The association should determine whether it will engage a log broker to represent their collective interests, and initiate contact with several others in order to explore this idea further.
- Community Futures and the North Island Consortium should further investigate the possibility of direct deep sea shipping of finished wood products.
- An inventory of forest species available for use in the manufacture of specialty products should be carried out on the North Island.
- In addition to advising the Ministry of Forests of its needs, the North Island Consortium should communicate their position to the Ministry of Forests regarding issues related to the SBFEP program.
- Continue to lobby the Ministry of Forests for a Community Forest on the North Island (e.g. Port Hardy or Malcolm Island).
- The North Island Consortium should become fully conversant of the range of government/industry initiatives already underway, and define its role accordingly.

Harvesting

- More information is required about the potential for commercial thinning in the Port McNeill Forest District.
- If there is sufficient second growth timber on TSA land to justify commercial thinning now, the Consortium should encourage the Ministry of Forests to include some commercial thinnings in the apportionment of SBFEP licenses.
- Market demand for commercial thinnings is cyclical, and presently quite poor.
- Further evaluate concept of pre-salvaging.

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Silviculture

- Silviculture expenditures are largely determined by the characteristics and needs of the forest resource, however job creation and regional economic development are also factors in the decision-making process.
- The Consortium can work with local silviculture contractors/workers and other individual proponents to identify creative ways to increase the availability of lands for planting new trees, such as converting marginal agricultural lands and non-productive brush sites, and to propose these ideas to the Ministry of Forests.
- Where feasible, Community Futures should provide assistance in developing business plans, negotiating with FRBC and financing the operations of North Island silviculture contractors who want to work on the North Island, with priority for those who employ North Island residents.

Watershed Restoration

- As in the case of silviculture, the North Island Consortium can be instrumental in communicating the employment and/or economic development needs of the North Island to the Ministry of Forests and FRBC, and in helping to define regional spending priorities by participation in the FRBC Regional Advisory Groups.
- Track developments in watershed restoration on the North Island. Work with MoF, MELP, First Nations, etc. to ensure that local workers are involved in the restoration work.
- The Consortium should establish an official liaison with the UFAWU in order to discuss potential personnel and training needs and spinoffs.
- Community Futures should endeavour to draw more professionals to live on the North Island, including those with the skills to carry out the assessments for watershed restoration.

Resource Inventory

- The North Island Consortium should stay apprised of its own inventory requirements (e.g., vegetation inventory on Malcolm Island) in order to further the objectives of increasing the timber supply to local processors or create short or long term local employment.
- Community Futures should obtain more information about what professions are required for resource inventories, and work to encourage self-employment and/or businesses with these specialties to become established on the North Island. Community Futures should provide information regarding land-based training to less skilled workers seeking employment in resource inventory.

Tourism

- Recommend Consortium discuss with VINVA and the Inner Coast Natural Resource Centre and First Nations, the most effective method of developing a coordinated strategy.

Botanical Forest Products

- Recommend CFDC establish a small task force including First Nations, Tourism, Training, MOF, District and potential contractors to set up management and research plan with liaison with MOF in Victoria.

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49. <i>Island Trust Forest Sector Profile: Main Report</i>, G.E. Bridges & Associates Inc. and Peter F. Walton & Associates Inc., 1998

Full report unavailable.

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; 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 published a summary report of the forest sector profile.

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<p>50. <i>Island Trust Forest Sector Profile: Summary Report</i>, G.E. Bridges & Associates Inc. and Peter F. Walton & Associates Inc., 1998</p>

Full report unavailable.

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.

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51. <i>A Marketing Program Study as part of: The Comox Valley Forest Sector Strategy,</i> Galloway, W.T., 1998

Full report unavailable.

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 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.

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

Identified Opportunities

- Value Added / Shared Resource Park in Gold River
- First Nations Joint Ventures
- Value Added Opportunities
 - Waste wood processing from forestry harvesting left overs
 - Use of fall downs and shorts, possibly finger jointing the pieces
 - Decking for Campbell River
 - Dry kiln
 - Salvage wood, including underwater wood salvage
 - Agro forestry, including initiatives such as “The Wildwoods Project”
 - Small, custom sawmill
- Forestry-Related Tourism Opportunities
 - Trail building (continuation of the West Coast Trail)
 - Trails on Nootka Island
 - Equipment rental
 - Corporate retreat (Friendly Cove)
 - A marina facility, possibly joint ventured with First Nations
 - Additional caving, scuba diving and group activities
 - Other ecotourism initiatives
 - Destination resort, joint ventured with an established chain
- Eco College

Opportunity SW&T

General Strengths

- Forests within the region that have been replanted and maintained
- Large forest land base of 500,000 hectares
- A climate which region promotes tree growth
- Current mining, prospecting and claim staking
- BC Hydro power capability that has already been installed for mills that have been shut at both Tahsis and Gold River
- Improved accessibility to Gold River on paved highway via Highway 28 from Campbell River and road access to Tahsis and Zeballos
- A helicopter base in Gold River and Government docks at Gold River and Tahsis

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- A passenger freighter, the Uchuck III, based in Gold River, services Tahsis, Kyuquot and logging camps in Nootka Sound
- A deep sea shipping dock at Gold River pulp mill (one unused since the removal of the paper mill) and at Tahsis saw mill
- Seaspan tug and barges that transport logs and chips and fuel between Tahsis and Gold River
- Wharves and docks for small craft are in every inlet
- taxi service in Gold River and minibus in Zeballos and Tahsis. Water taxi service available in all three communities
- telephone communication by land lines in the three communities but smaller camps and settlements use satellite communications or radio phones

Value-Added / Shared Resource Park in Gold River

Strengths

- Reduced operating and overhead costs
- A variable labour pool, drawn from the region, i.e. where people can work in any of the park participant facilities, where and when there is work available
- Access to process, packaging and shipping equipment
- Direct access to fibre to meet their needs
- Shared management, administrative and accounting functions
- The ability to bid on, produce and / or joint venture with other park residents who have complimentary skills and abilities
- The ability to share leads and proposals
- Access to working capital required, albeit less than they would need had they remained operating on their own
- Access to technical, entrepreneurial and business training on site
- Access to others (workers) who have participated, or graduated, or are currently participating in the training process
- Access to business resources, i.e. databases, Internet, information and market contacts
- The ability to participate in a Marketing Co-operative, i.e. have an experienced Marketing Manager identify and develop opportunities

General Weaknesses & Threats

- The average rainfall in Nootka Sound is over 3,000 mm per year.
- The outer sea-coast is exposed to the Pacific and can be windy with rough and unpredictable seas.
- The geography of the area is mountainous.

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- The communities of Zeballos and Tahsis are located on the river deltas. Areas within these communities are subject to flooding. Gold River is the only community that was built above the 200-year flood plain. All three areas would be vulnerable in a Tsunami resulting from earthquakes either close or across the Pacific Ocean. Nootka Sound is on an active fault zone.
- Residents in Nootka Sound are of several special interest groups who belong to organizations that have a world wide impact on policy and the economy of the region.
- Ecological disruption whether from over-harvesting trees, fish or any resource are a real and ever present danger and this issue is being addressed by the Vancouver Island Land Use Plan.
- El-Nino has guided the weather patterns over the past decade and has caused warmer air to change ocean temperatures along the Nootka coastline. This has impacted the fish stocks and brought exotic species to the waters of Nootka Sound, including Mackerel, which eat small salmon. Winds and weather associated with El-Nino have affected the outflow drafts in the narrow river valleys in the Power River drainage north of Kyuquot Sound.
- The lack of a loop roadway connecting Gold River and Tahsis with Zeballos is perceived as a deterrent to tourism development. Plans to build the road are currently underway.
- The Region is not on any through highway network. That is, the region is isolated more so than other resource communities that are closer to main highways. As such, Nootka Sound is a destination location. This isolation, however, can be perceived as a regional strength as well, particularly those marketing the region as a wilderness location.

Identified Economic Benefits of Opportunities

- Jobs
- Diversification of the economy
- Expansion and development of infrastructure

Action Plans regarding opportunities

Value-added /Shared Resource Park

- Establish and access a dedicated supply of fibre for value added producers
- Establish an asset base to act as security in financing the park
- Determination of fibre availability, species and optimum utilization
- Pre feasibility
- Establish facility direction
- Identify potential founders
- Identify potential resident tenants
- Determine the costs and project sustainability
- Attract players
- Implementation

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Value-added Opportunities

- Develop a proactive Nootka Sound based support infrastructure group, including the Economic Development Offices, Nootka Resource Board, Chambers of Commerce, BDC, HRDC and Comox-Strathcona Community Futures
- Invite project proponents to prepare and submit Business Plans and Proposals. Where needed, work directly with them to help design same.
- Meet regularly and evaluate the projects, the merits, the strengths and weaknesses of the entrepreneur and the commercial viability of the venture.
- If viable, work with the proponent towards securing funding, and possibly suggesting certain partnering options.
- Organize and carry out regular training programs within the region.
- Make available, through funding vehicles such as Community Futures, access to critical project funding that can generate sustainable jobs. Set investment criteria more flexible than in the Campbell River and Comox Valley regions, as some projects put forth in the Sound may have a higher risk factor than those of adjoining regions.
- Create a Marketing Co Operative for regional artisans and crafters, to best capitalize on sales opportunities.

Eco-College

- To organize a committee of interested parties
- To commence talks with The Pacific Biological Station (Nanaimo, Port Renfrew)
- To identify other colleges and training institutes, and contact them to gage interest, and possible joint venturing
- To approach the Ministry of Education to investigate funding possibilities

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53. <i>The Potential of Aboriginal Wood Carving in the B.C. Value-added Forest Products Sector</i>, Shawn Morford, 1998.
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Full study unavailable.

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

Identified Opportunities

- Campbell River Community Forest

Opportunity SW&T

Strengths

- Preservation and enhancement of the municipal water supply
- Provides access to material for locally and regionally based value-added manufacturers
- Promotes non-timber forest products
- Promotes greater public access to forest lands for recreational activities
- Facilitates the development of market intelligence to be shared with the local network of small manufacturing firms
- Links the North Island College and School District 72 Cooperative and Environmental Studies program into a “live” operational theatre

Identified Economic Benefits of Opportunities

- Creates locally based competitive log market
- Contributes to the provincial forest revenue system
- Finances local municipal and community economic development capital projects by means of a Municipal General Reserve Fund
- Integrate local displaced Forest Workers into a locally managed Community Forest organization. Becomes a pro-active investment in economic transition of this coastal forest community.

Action Plans regarding opportunities

- Establish the Terms of Reference for the Community Forest Tenure Agreement with the Province
- Establish the Steering Committee for the interim Board of Directors and register the CFL as a Corporation
- Circulate the submission to all registered interests and facilitate a Public Meeting
- Undertake a Request for Expression of Interest and Qualifications to establish Recreation, Tourism, and Education partners and develop letters of intent
- Secure first year financial commitment to fund a consulting RPF Forester to develop the proposal
- Mayor to consult with resident First Nation Chiefs to determine the most appropriate means of participation
- Make transition from initial steering Committee to fully operational Board of Directors and Management Unit

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55. <i>Sources and Utilization of Wood Waste in the Comox Valley - Campbell River Area</i>, Econ Consulting Ltd. (Harold Macy and Wolfram Wollenheit), 1998
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Full report available.

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 m³ 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.

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Tourism/Recreation Sector

<p>56. <i>Artlish Caves Park Inventory and Monitoring Project</i>, Cave Management Services, 2000</p>

Full report unavailable.

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.

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<p>57. Coastal British Columbia Economic Gain Spatial Analysis, Tourism Sector Report, The Economic Planning Group, January 2003</p>

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 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 ratings 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.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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<p>58. City of Courtenay Community Goals and City Policies on Arts and Culture, Bernie Jones and Bob Yates, November 3, 2003</p>

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. As a policy document, it does not address opportunities.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

As this is a marketing plan, specific business opportunities are not discussed.

Identified opportunities – none noted

Opportunity SW&T – not applicable

Identified economic benefits of opportunities – not applicable

Action plans regarding opportunities – not applicable

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

As this report is largely a visitor services strategy, specific tourism businesses are not addressed. The resultant SWOT summary from community consultations is listed here for purposes of context and to list those opportunities that could create additional jobs such as the building of a Highway Visitor Information Centre and the addition of multiple kiosks. Note that these are not specifically business opportunities but they would create jobs and potentially revenue.

STRENGTHS	
<ul style="list-style-type: none"> Growing population Growing visitor markets Professional VIC services Quality, diverse transportation infrastructure Ongoing municipal investment (walkways, trails) Quality outdoor recreation features 	<ul style="list-style-type: none"> Core of hospitality services Critical mass of tourism operators Growth of destination facilities Growing municipal cooperation Reputation as a friendly community
WEAKNESSES	
<ul style="list-style-type: none"> Lack of cooperation between VICs/chambers Lack of consistency in marketing materials Uncoordinated operations Uncoordinated racking Lack of coordination in marketing materials Overlapping or poor maps and brochures Poor physical VIC facilities Poor VIC locations Inadequate operating hours/days Limited parking Poor or no RV parking No highway access 	<ul style="list-style-type: none"> Limited and confusing community signage Poor maintenance Uncoordinated kiosks Inability to rack unless a chamber member Multiple organizations involved in tourism VIC emphasis on hospitality, not attractions Lack of tourism product Lack of VIC accountability Duplication of services Lost visitation because of gaps in visitor services Lack of services at key points of entry High cost of multiple memberships
OPPORTUNITIES	
<ul style="list-style-type: none"> Comox Valley vision Comox Valley brand for visitor services and marketing One organization for all tourism services Cooperative VIC services VIC highway facility 	<ul style="list-style-type: none"> Multiple kiosks coordinated with a central VIC Comox Airport kiosk North Island gateway Cross-marketing of VICs Coordinated maps and brochures Events calendar
THREATS	
<ul style="list-style-type: none"> Historical reluctance for communities to cooperate Fear of change 	<ul style="list-style-type: none"> Possible funding cuts Loss of visitors and tourism potential

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Identified opportunities

- New Highway Visitor Information Centre and Multiple Kiosks

Opportunity SW&T

Highway VIC Strengths

- Future increases in visitor traffic will be on the Island Highway
- Opportunities to increase the capture rate of north and south-bound traffic, as many travellers are reluctant to go too far off the highway if they are unfamiliar with a region
- Opportunity to be a North Island gateway
- Opportunity for piggy-backing on partners as a way of lowering development and operating costs
- Opportunity for taking advantage of possible commercial cluster at the interchange which may result from Cumberland's new OCP
- Capability to promote entire Comox Valley

Highway VIC Weaknesses & Threats

- High costs of development
- High costs of operation
- Reluctance of Courtenay and Comox to support a facility based in Cumberland
- Inconvenience for residents who may have to travel out of their way to get to the VIC
- Most visitors are destination-oriented and therefore do not require VIC services. Most VICs are downtown
- Highway VIC operated in conjunction with existing VICs would lead to watered-down visitor services

Identified economic benefits of opportunities

A VIC or multiple kiosks do not necessarily provide a source of revenue. However, if they are successful in capturing more of the drive through traffic and directing it to tourism businesses, the revenue is realized in an indirect fashion.

Action plans regarding opportunities

- Ensure the visitor survey recommended provides some insight into a visitor profile at the highway VIC location
- Monitor Cumberland's OCP process and subsequent commercial development around the interchange so as not to foreclose on future options
- Explore with Cumberland, the feasibility of tax options dedicated toward infrastructure development

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- Pending positive outcomes of the preceding two initiatives, establish a trial kiosk at the interchange over the peak summer tourist period to gather further research and intelligence on the benefits of the VIC
- As an alternative to the kiosk, or, as an interim step until a pilot is launched, consideration should be given to erecting major signage or billboard on the Island Highway directing travellers to the existing VICs

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

Identified Opportunities

- Guided Wildlife Viewing – Marine. Water wildlife viewing would of whales, sea lions, seals, sea otters, birds and bears.
- Rental of Kayak Expedition Equipment. This can include the basic equipment such as the boat, paddle, lifejacket, radio, as well as supplies such as food, matches, beverages etc. This could be provided in a staging area, which could also provide accommodation.
- Shuttle service for kayakers, mountain bikers, backpackers.
- Guided kayak tours and trips and whitewater kayaking. These could be day tours or week-long trips. They could be as simple as providing the direction, to offering full service such as setting camp, cooking meals etc. This could be combined with a training program or outward bound.
- Marine hut-to-hut Operations. This would involve the management and maintenance of the huts. The closest community would act as the staging area.
- Marine Cruises. Converting fishing boats to tourist boats. These boats could then be rented out or they could be guided tours.
- Boat Moorage. The cruising community requires safe mooring. It helps establish the nearby communities as destinations. It would require collection of moorage fees and maintenance.
- Scuba Diving. There are some excellent scuba diving locations along the coast. Providing equipment and shuttling are possible.
- Land Hut-to-hut Operations. This is the same as the ‘marine’ opportunity, but oriented around lakes and trails.
- Guided Wildlife Viewing – Land. Land wildlife viewing could include Bears, Salmon, Birds, Mountain Goats etc.
- Trails/Hiking. Development of regionally significant coastal hikes. This links with other products such as kayaking, lodges, hut-to-hut etc.
- Motorized Adventures (4 x 4's, ATV's, etc.)
- Guided Fishing.
- Guided hunting.
- Cultural and Historical Expositions. This could be provided through a cultural centre or museum. Building a big house or long house to contain such a product in any of the First Nation Villages is ideal. This could be self-guided or guided by a tour leader. This could be combined with a gift shop.
- First Nations Dance Troupe – This could be mobile and marketed for conferences, special events and the general public.

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- Interpretive Cultural Tours – These tours could be marketed to the pocket cruise ship industry. They could be available as self-guided tours with an entry fee.
- First Nation Cultural Events and Entertainment. These could be held in a long house or whatever traditional structure is relevant. They could include storytelling, singing, dancing, drumming, Salmon BBQ's or other culinary events.
- Design and build a Traditional Village.
- Re-creation of traditional travel routes.
- Artists Centre. This could have demonstration projects such as canoe making, basket weaving, food preparation, carving, etc.
- Lodging. General accommodation in staging areas for other activities.
- Hardened Campsites. These occurring on traditional territories need to be maintained and fees collected. They could be combined with trails systems and interpretive tours.
- Fly-In Lodges. There are numerous locations that provide ideal settings for remote lodges. This could be a high-end lodge providing a wide range of activities from fishing, hiking, spa products, and wildlife viewing.
- Retreat Centres. This could be used for the local market for training courses, conferences, healing circles, etc. Orient it to be high quality and environmentally sensitive.
- Cruise Ship Industry. With the dock being built in Prince Rupert, it is going to be drawing the large cruise ship industry. First Nation groups in the area (Tsimshian) should ensure that they are involved in this opportunity, both through providing cultural tours and other services required by this industry.
- Support Services for Pocket Cruiseships. This could include fuel, food, and repairs.
- Pocket Cruise Industry opportunities.

Opportunity SW&T – provided as a proprietary chart / model

Identified economic benefits of opportunities – not applicable

Action Plans regarding Opportunities – not applicable

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<p>62. <i>First Nations Coastal Tourism Strategy, Overview</i>, First Nations Coastal Tourism Steering Committee, March 2003</p>

The report reviews both previous phases and recommends strategic directions and opportunities that First Nations should pursue to develop a long term tourism industry. In total 8 recommendations are outlined.

Identified Opportunities

None noted

Opportunity SW&T

None noted

Identified economic benefits of Opportunities

Not relevant

Action Plans regarding opportunities

Not relevant

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

Ocean Kayaking

- Opportunities include: Marine hut-to-hut; Shuttling services; Mothership; First Nations; Camp sites; Rentals

Lake River Opportunities

- Opportunities include: Remote fly-in lodges; Freshwater fishing; Remote rafting (Klinaklini)
- Linkage opportunities exist with hiking and lodges/resorts

Marine Cruising

- Converting fishing boats for cruising purposes is gaining popularity and could support the economic transition of communities in the region
- Opportunities include: Northwest Pocket Cruises; Regional Cruises; and Mothership Cruises
- Linkage opportunities include: Ocean Kayaking; Lodges/resorts; Huts; Historical/ cultural interpretation; Wildlife viewing; Scuba diving

Culture/Nature/Wildlife Viewing

- Participation by First Nations in the development and delivery of Aboriginal cultural interpretation is essential
- Opportunities include: Wildlife viewing (Grizzly viewing on mainland rivers and inlets, Orcas, and Oolichans and associated prey species); First Nations interpretation (Namgis/Alert Bay); Visits to abandoned Aboriginal villages; Interpretive cultural tours (Sointula, Telegraph Cove); Research ecotourism (where tourists contribute to local species observations & data collection)
- Linkages exist with Marine cruising and ocean kayaking

4X4/ATV Touring

- Unguided ATV Touring could be linked with fishing, camping and wildlife viewing
- Opportunities: ATV (and motocross) circuit development, interpretive tours, ATV exploration of remote marine accessed logging roads, off-road camping and events, extreme sporting potential, code of conduct, designated areas, multi-use with mountain bike events

Lodges/Resorts

- The majority of coastal lodge/resorts are situated in areas best suited for fishing. Lodges which have access to a diversity of activities, are in close proximity to wildlife viewing areas or those who have established a market niche will have a competitive advantage in the shift to the ecotourism market
- Opportunities include marine, backcountry and fly-in lodges

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Hut-to-hut Activities

- Hut systems can span a range of development concepts, from high-cost, high-comfort facilities that are almost mini-lodges to very rustic alpine huts. Related outdoor activities include ski touring, snowshoeing, mountain biking, backpacking and kayaking.
- Opportunities include marine interface huts and marine cruising.
- Easy access to some areas may necessitate close monitoring or on-site staff.
- This area is well suited for high-end marine huts that can be frequented by private vessels.

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Product	Community				
	Comox Valley	Campbell River	Quadra Island	Sayward	Kyuquot
Trail-based & Road-based					
▪ Off-road biking	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Bike touring	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Community tours	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ 4x4/ATV touring	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Day/heli-hiking	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
Area-based					
▪ Nordic Skiing/ Touring	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Wildlife viewing	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Cultural interpretation	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Community theme development	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Specialty lodges	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Huts	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
Water-based					
▪ Northwest Pocket Cruises	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Regional Pocket Cruises	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Canoeing/kayaking (freshwater)	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Ocean kayaking	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>
▪ Freshwater fishing	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>	<u>X</u>

NOTE: Blue crosses confirm the opportunity

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Opportunity SW&T

Ocean Kayaking

Strengths

Significant features, access, remoteness, scenery, heritage and cultural exposition, and some sheltered marine destinations. Historic and current First Nations presence.

Weaknesses

Repeatability of feature along coast, high precipitation, Commercial Recreation (CR) tenure, uncertainty related to land claims and traditional use sites, evidence of historic resource degradation, rapidly changing weather and sea state conditions, relatively short "season".

Threats

Increased use affecting "remote" experience, forest harvesting (scenic), user safety preparedness, human waste management, conflicting site uses, competition for limited campsite options, user impacts on sites.

Nordic Skiing / Ski Touring

Strengths

Scenery, access and proximity to population center (Mt. Washington Nordic Centre), significant wilderness ski touring, Strathcona Provincial Park, Strathcona Nordic Ski club, relatively long season (5-6 months).

Weaknesses

Limited locations, ferry travel, limited development and infrastructure to support activity, limited population base to support infrastructure development, poor road conditions to many backcountry trail starts, medium to high avalanche hazards, rapidly changing humid snow conditions.

Threats

Climatic conditions, land tenure, off-road motorized vehicles, lack of public sector funding to develop and maintain opportunities, competition/conflicts with snowmobile use areas.

Lake / River Activities

Strengths

Circuit lakes, scenery, accessibility, remoteness, proximity to population centres.

Weaknesses

Uncertainty related to land claims.

Threats

Increased recreation use affecting "remote" experience, forest harvesting, affects on steelhead stock.

Marine Cruising

Strengths

Sportfishing, range of remoteness, scenery, high value features including wildlife (bears on beaches and whales) and natural features, culture, numerous lodges, lighthouses, remote communities and tourism infrastructure.

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Weaknesses

High precipitation, lack of organized tourism related activities in a number of communities (e.g. cultural interpretation shows), lack of infrastructure including availability of holding tank pump-out stations, high costs to develop infrastructure.

Threats

Forest harvesting (with visual and environmental concerns), lack of community support, liquid and garbage waste disposal, contamination of anchorage sites and shellfish beds/aquaculture.

Culture / Nature / Wildlife Viewing

Strengths

Quality and quantity of cultural, natural and wildlife resources, very high marketability for both marine-based (Orcas) and land-based (grizzlies, elk) species, existing capacity for further cultural interpretation.

Weaknesses

Operator attention to resource management issues, level of support facilities and services available (in terms of washrooms, buildings, parking areas, etc.), habituation of bears to tourists, unknown impacts on wildlife behaviour and reproductive capacity (e.g., whales and birds).

Threats

Over use effecting migratory and nesting sites and reducing wildlife observation opportunities.

Mountain Biking / Bike Touring

Strengths

Scenery, significant recreation features, logging roads, numerous trails associated with urban areas, long season, mild weather, multi-level integration.

Weaknesses

Lack of trails in general, lack of loop circuits, lack of destination trails, limited technical and aerobic range of trails.

Threats

Lack of public sector funding to develop and maintain trails, denied use of private lands.

Hiking

Strengths

Scenery, significant recreation features, logging roads, accessible glacier (Comox), alpine, international draw of Strathcona Park, opportunity for coastal hikes with outstanding beaches, numerous trails associated with urban areas.

Weaknesses

Weather, few existing trails outside of urban areas.

Threats

Lack of public sector funding to develop and maintain trails. External competition.

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4x4 Auto / ATV

Strengths

Logging roads, remote communities, destination features.

Weaknesses

Road deactivation, industrial activity, poor signage, vandalism and rowdy behaviour, road, trail and site maintenance, lack of designated areas, safety concerns.

Threats

Denied access to private lands and parks, high potential for conflict with other users and with sensitive wildlife habitats, high operating costs.

Destination Lodge / Resort

Strengths

Geographic diversity and related opportunities, proximity to population/ transportation centers, proximity to high-quality outdoor recreation features.

Weaknesses

Fish regulations and associated uncertainties, access to Crown leases or other Commercial Recreation (CR) tenure, regional transportation costs, international and provincial competition for similar products, lack of an international destination product other than fishing, lack of diversification among fishing lodges, distance from significant wildlife, natural and cultural features, relationships with local communities and suppliers, tendency to attract male-only clients (fishing lodges).

Threats

Fish stock, scenic management of the forest land base, illegal facility construction on Crown land and foreshore, long-duration stays by non-resident boat and mothership owners.

Hut-to-Hut Touring

Strengths

Remoteness, scenery, significant recreation features, optimum topography.

Weaknesses

Vandalism, repeatability of product potential along BC coast, lack of support infrastructures (trails), difficult for private operator to obtain financing, compliance and enforcement, carrying capacity unknown, relatively untested high-end product.

Threats

Uncertainty associated with land claims, increased recreation use affecting "remote" experience, forest harvesting.

Identified economic benefits of opportunities

- Tourism British Columbia reports that in 1999 the industry generated over \$9.2 billion in revenue, up 4.9 percent over 1998.

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- 22.3 million visitors supported 16,500 tourism related businesses in 1999.
- 115,000 people are directly employed in this sector in the Province, not including self-employed workers
- Direct and indirect employment is estimated at about 250,000 individuals.
- Tourism is the second-largest earner of export (foreign exchange) income in the provincial economy, after wood products.

Action Plans regarding Opportunities

Ocean Kayaking

- Encourage value-added and unique experiences, since the region already has destination status in the US market.
- Closely monitor transportation access modes, especially highways and ferries for changes which could impact visitation to the region by potential markets.
- Collaborate with First Nations to identify opportunities for commercial development on Reserve land.
- Work with local recreationists to develop a code of ethics that could contribute towards resolving potential disputes.
- Develop product guides and floor displays targeting potential participants (e.g. soft adventurers) who travel along the highway.
- Develop signage, map guides, codes of conduct and safety tips for the Broughton Archipelago. Prominently display these in staging areas.
- Develop shuttling opportunities, docks, kayak supply kiosks and radio rentals.

Lake/River Opportunities

- Communities should encourage relationships with air companies to act as staging areas for fly-in fishing opportunities.

Marine Cruising

- Prepare fact-sheet on how to convert fishing vessels to motherships/cruise ships to encourage local development.
- Ensure dock, fuel, and other marine services are competitive so the region can promote itself as a staging area for cruising to / along the Mainland.

Culture/Nature/Wildlife Viewing

- Support whale - watching operators as they strive to develop local solutions to over-commercialization and set code-of -conduct standards.
- Encourage the development of contingency planning by operators to ensure visitors will have the opportunity to view some wildlife, if not the target species (e.g. viewing of bears, eagles or sea lions if whales cannot be located).

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- Identify and promote the development of high-end accommodation opportunities, perhaps by projecting future bed/unit demand. This will allow wildlife - viewing operators to provide a better product for long-haul markets.
- Develop a trial project with local First Nations in a combined ecotourism/ cultural interpretation product. One such product could revolve around a camping/marine trail circuit in the Johnstone Strait that incorporated interpretation and education around traditional use.
- Identify partnering agencies as well as a “broker” to work with interested First Nations’ entrepreneurs.

4x4/ATV Touring

- Identify Mainland trails or roads, which could have potential for ATV use, and advocate retention of high-value roads slated for deactivation by MoF.

Lodges/Resorts

- Offer site development services, identifying and marketing prime sites for development

Hut-to-hut Activities

- Investigate the feasibility of having First Nations establish a hut-to-hut system on Reserves.
- Prepare a concept brief, possibly with the assistance of Community Futures.

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

Identified Opportunities

- Recreation – Water Sports: Diving/Snorkelling; White Water Rafting / River Floating / Kayaking and Canoeing; Salt Water Kayaking; Marine Touring
- Land Sports – Cycling/Caving
- Fresh Water Fishing
- Wildlife Viewing

Opportunity SW&T Strengths

- Protected coastline, which makes the area one of the safest and most accessible diving areas in the world.
- Conducive to underwater photography, spear fishing and shellfish collecting, bottle collecting, wreck diving and night diving.
- Area is largely unexplored by divers as a whole.
- Inside passage and Vancouver Island coastline is presently becoming one of the prime destinations for paddlers from all over the world.
- Vancouver Island has great opportunities for exploring Karst cave systems.
- Advantage of fresh water fishing is in that it does not require the investment of a boat to access the remote areas.
- First-rate viewing opportunities are available virtually everywhere and in close proximity to the village and the district.
- Cable House Cafe already enjoys a sizeable trade in bus tours.

Weaknesses & Threats

- Lack of the availability of a commercial charter company, rental or air for diving in the immediate vicinity and competition from Campbell River Port Hardy/Port McNeil regions where appropriate services are available.
- Lack of infrastructure for kayaking in terms of facilities and information for the traveler. Also there is no gear rental available nor does any local business cater to the purchase of supplies needed for any expedition travel.
- Relative lack of numbers in terms of tourism traffic.
- Cave systems on Vancouver Island are challenged by the fact that there may be several caves in one small area and each one of them will be positioned on land that is managed or owned by a different government agency or private company. Also included in this trial is that fact that there is no management in place for protection of the Karst systems.

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Identified Economic Benefits of Opportunities

- In the year 2000, 113,940 people were directly employed in British Columbia's tourism industry, ranking it third in provincial employment and ahead of all of the goods-producing (resource based) sectors. Tourism employment in BC accounts for approximately 1 in 12 jobs in the province, second to the Retail and Wholesale Trade, Health and Social Services and Education.

Action Plans regarding opportunities

None in particular

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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 Kareen Graham, 1998

The V.I.N.V.A. was formed by partners in tourism North of Sayward and Gold River. As such the opportunities below are largely outside of Comox-Strathcona.

Identified Opportunities

- Create a professional North Island display booth to be used at trade shows
- V.I.N.V.A. to participate in at least two high profile trade shows for 1999 season
- Hosting F.A.M. tours
- Installation and operation of 1-800 for information pertaining to membership
- Development of web site and pages
- Two-tiered membership

Opportunity SWOT – not applicable

Identified economic benefits of opportunities - not applicable

Action Plans regarding Opportunities – see opportunities

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

Identified Opportunities

- Automobile tours: two wheel drive (including bus or van tours and motor home access) and four wheel drive
- Heritage
- Hiking/Backpacking
- Karst/Cave
- Lodge/Resort
- Marine Cruising
- Scuba Diving
- Sea Kayaking
- Wildlife Viewing

Opportunity SW&T

Strengths

- Presence of a park enhances the two wheel drive product.
- Nootka Sound is noted for it is wild freshwater sport fishery.
- Some opportunities do exist for capitalizing on the weather conditions, such as storm watching, beach combing after a storm, and windsurfing.

Weaknesses & Threats

- There is a lack of basic knowledge at some of the more popular use sites of their biophysical carrying capability to support sustained levels of recreational and tourism use.
- There is concern that the salmon resource will be unable to sustain the present level of harvest.
- Wildlife migration patterns are not consistent enough for operators to be able to guarantee a chance of seeing a specific species at any one time.
- Commercial kayak guides feel very strongly that the presence of these fish farms has a negative impact on tourism.
- Winter participation in marine activities varies from day to day depending on the weather conditions.
- Interaction between resource extraction and recreation/tourism.
- Beaches with semi-permanent base camps or that are covered in garbage detract from the recreational experience in many activities.
- The seniors market segment is, at present, virtually excluded from participating in activities in Nootka Sound.

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- At present there is no scheduled bus service to the region.
- There is a lack of rental options for visitors to Nootka Sound.
- Needed funding
- Lack of infrastructure
- Regulatory Issues

Identified Economic Benefits of Opportunities

- Jobs
- Diversification of the economy

Action Plans regarding opportunities

- Further, detailed study of these high capability sites should be undertaken before any are developed for recreation or tourism. Particular attention should be placed on the social, biophysical and legal constraints.
- Further research on wildlife trends, habitat and migration patterns in Nootka Sound may help to identify sites, seasons or specific times when there is a better than average chance of seeing wildlife.

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Transportation

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

Identified Opportunities

Air Cargo – seafood and agricultural products, organic food production

Opportunity SW&T

Strengths

- Aircraft technology
- Operations changes
- Deployment of advanced information systems
- Packaging innovations
- Geographic position on Great Circle Routes
- Heavy lift capable runway
- Emerging value-added markets
- Globalization of production and free trade
- Shift to JIT systems
- Modern retail supply chain management
- Global increase in seafood consumption such that by 2010, 50% increase in annual global consumption to 120 million tonnes and 650% increase consumption in farmed product
- Air cargo is a growth industry having grown historically at three times the rate of world economic growth

Weaknesses & Threats

- Economies of air cargo do not favour air transport of goods to a gateway for further processing before onward shipment to the end consumer market
- There will need to be expanded value-added processing capacity for products, development of air cargo facilities on or near the airport grounds
- Lack of inspection facilities on Vancouver Island
- Lack of a comprehensive marketing plan for Vancouver Island agri-food products
- Limited grading and packaging facilities
- Pre-shipment inventories are consolidated on the mainland
- Development of the high value greenhouse/hothouse sector is constrained by industry quotas

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Identified Economic Benefits of Opportunities

- Presence of affordable air cargo expands the markets for regional products, especially for products like perishable foods, which have limited shelf life
- Air service allows the region's products to reach more destinations

Action Plans regarding opportunities

None in particular. The Phase II Study was already underway.

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

Identified Opportunities

Air Cargo for the Comox Valley Airport

Opportunity SW&T

Strengths

- YQQ operates 24 hours – easy to co-ordinate schedules
- There is a variety of idle cargo aircraft at YVR, as well as at SEA
- The airport has good navigation aids and runway length
- The airport is capable of handling large aircraft
- The region can generate good potential loads to move in the weak air cargo direction out of the Northwest

Weaknesses & Threats

- The development of air cargo facilities including buildings and apron space needed
- Securing the services of an air cargo carrier
- Development of freight forwarding infrastructure needed
- Provision of aircraft specific cargo handling equipment and personnel
- Provision of aircraft servicing capabilities
- Securing inspection services
- Participation of regional producers

Identified Economic Benefits of Opportunities

- Potential to create a number of new jobs and economic activity both during the initial construction of cargo facilities and infrastructure, and through on-going activity related to the actual air cargo service – roughly 500 jobs.
- Benefits extend to those involved with the production and processing of the region's stocks of seafood and agrifood products.
- Prospect for indirect employment and economic gains in the region associated with harvesting, processing, packaging, and sales of products.

Action Plans regarding opportunities

Chapter 10 provides a detailed Action Plan outlining a number of options.

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

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

As such, the opportunity of developing Air Cargo has already been addressed in earlier studies.

New opportunities are not presented here.

Identified Opportunities – not addressed

Opportunity SW&T – not addressed

Identified Economic Benefits of Opportunities – not relevant

Action Plans regarding opportunities – not relevant

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

Identified Opportunities – not addressed

Opportunity SW&T – not addressed

Identified Economic Benefits of Opportunities – not relevant

Action Plans regarding opportunities – not relevant

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

Identified Opportunities

- Rental car facilities for cleaning and managing operations;
- Tour bus facilities;
- Hotels, motels, and convention centres;
- Resort offices for meeting and greeting passengers;
- Warehouses, storage and distribution centres;
- Light industrial including manufacturing and retail; and
- In-bond FTZ-type activity.

Opportunity SW&T Strengths

- As the only airport north of the Malahat able to serve larger jet aircraft (such as WestJet's Boeing 737-700s), the airport is well positioned to serve the population and business growth on mid and north Vancouver Island.
- CVA's existing traffic is projected to grow, and the airport is tracking the high end of the passenger forecasts prepared for it in 2002.
- The Comox area is perfect for shellfish and cargo exports.
- The CVA has considerable potential for attracting daily transborder flights to Sea-Tac International Airport in Seattle.

Weaknesses & Threats

- Developing typical airside business opportunities such as aircraft maintenance will be a significant challenge at Comox because it is a DND airport with security restrictions on airside access and because the civilian terminal has relatively little land leased.

Identified Economic Benefits of Opportunities

Traffic from the airport would feed the potential businesses. This would provide jobs.

Action Plans regarding opportunities

Next steps are highlighted from the meeting discussion and are assigned to specific individuals. They are not listed here due to lack of complete information as to the meaning of many of the steps.

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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.

Identified Opportunities – not addressed

Opportunity SW&T – not addressed

Identified Economic Benefits of Opportunities – not relevant

Action Plans regarding opportunities – not relevant

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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).

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.

No specific business opportunities are addressed.

Identified Opportunities – not addressed

Opportunity SW&T - not addressed

Identified Economic Benefits of Opportunities – not relevant

Action Plans regarding opportunities – not relevant