

# WHEN OUR NATION BUILDS

## Part 2: The Five Conditions to Yes

Prepared by: iTotem Analytics

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**Alex McMillan**, President and CEO (interim), Vancouver Chamber of Commerce

*Energy for a Secure Future acknowledges that this report captures only part of the picture of these projects, and that more stories and lessons remain to be explored. It is offered as a starting point – a picture of what all Canadians can celebrate about these ground breaking projects and be inspired by as we continue to build our shared future.*



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**Pipe Line Contractors Association of Canada**

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## ***A Letter from the Energy for a Secure Future Advisory Council***

The successful completion of LNG Canada Phase I and the Coastal GasLink pipeline marks not just an historic achievement for Canada, but the beginning of something far greater: a new era in which Canada delivers responsibly produced energy to the world while creating lasting prosperity at home.

When Our Nation Builds takes stock of how we got here, and provides early signals of where those two projects, plus the addition of Cedar LNG, LNG Canada Phase II and Ksi Lisims LNG could bring British Columbia and Canada.

Each of us who has signed this letter takes personal pride in the story having worked alongside those who did and continue to do the work.

One of us is the former Chief of a Nation whose territories the pipeline crosses – a Nation that took a chance on the Coastal Gaslink project, despite national controversy. Today, that Nation, alongside the others on the pipeline route and in the Montney basin, has a share and a say in major infrastructure running through our homelands. Many in our Nations have built skills and businesses that have also helped other local projects, like Ksi Lisims LNG to thrive. It has not been an easy road. There were difficult decisions, community debates, and no guarantee of the outcome. But the journey has been transformative, building confidence and a new vision for the future – a future in which resource development is a tool for ending the poverty that has afflicted our communities for generations, and a pathway to opportunities for our children.

Another of us sees these projects and Canadian LNG through the lens of the thousands of skilled workers who built these facilities and take pride in the role they have played in history – in making these projects a reality. They are ready to apply their skills – as insulators, pipefitters, heavy equipment operators and more – to make the next phase of projects a reality. We look forward to what we hope will be Final Investment Decisions on LNG Canada Phase II and Ksi Lisims LNG, decisions that would put those skills back to work and extend the corridor's benefits to a new generation of workers and communities.

Finally, one of us sees the national and international supply chain story driven by the growth in Canadian LNG. Companies like Tenaris – which operates globally and has committed \$350 million to Canadian pipe manufacturing since 2020, and has announced a further \$306 million in investments over the next two and a half years – are choosing to invest and build here, even establishing new facilities in Fort St-John to supply the growth of the industry. That investment translates into well-paying jobs in Ontario and other provinces across the value chain, reinforcing that the benefits of Canada's LNG sector flow from coast to coast.

As Canadian LNG exports grow, so too does the value of everything this report describes. Access to global markets, particularly in Asia, means more royalties for the Province, more jobs and skills growth for workers across Canada, more opportunities for Indigenous Nations, and more investment in the communities and services on which British Columbians depend.

We are releasing this report at a moment of genuine global urgency. Energy markets are under strain as historic certainties fade and countries seek reliable, alternative energy suppliers insulated from geopolitical chokepoints. Canada has an answer. We have world-class natural gas resources, a regulatory

framework that sets the global standard for environmental performance, and a model of Indigenous partnership that no other producing nation can match. The projects described in these pages position Canada to step forward as exactly the kind of reliable, responsible energy partner the world is looking for.

At its heart, this report is about demonstrating that when Canadians come together – industry, Indigenous Nations, governments, workers, and local communities – we can achieve extraordinary things. When we build, we create prosperity, opportunity, and a stronger future for our country and our communities.

We believe Canada now has an historic opportunity, in this moment and in the years to come, to continue building together – and to make a meaningful contribution to a better future for Canadians and for the world.

The road ahead begins with “yes.”

**Karen Ogen**

CEO, First Nations  
Natural Gas Alliance

**Sean Strickland**

Executive Director  
Canada's Building Trades Unions

**Martin Castro**

President  
Tenaris Canada

***Energy for a Secure Future is a non-partisan civil society initiative that brings together Canadian business leaders, Indigenous peoples, organizations, and experts in a new conversation about energy and building a secure future for Canada and our allies around the world.***



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## REPORT HIGHLIGHTS

The report finds that LNG Canada, Coastal GasLink (CGL) and the upstream natural gas sector have generated significant economic, social and community benefits across British Columbia's LNG corridor:

### Part 1 - Canada's LNG Advantage

- Canada has become a liquefied natural gas (LNG)-exporting nation with access to Asian markets. Our exports build on two key strengths, the quality of the Montney Basin and its natural gas assets and the proximity of Canada to Asian markets compared to our competitors.
- The Montney Basin spans roughly 130,000 km<sup>2</sup> across B.C. and Alberta and contains more than 81 trillion cubic feet of proven recoverable natural gas reserves and significant additional potential resources.
- Canadian LNG can provide Asian countries with a more secure and geopolitically stable energy supply, with half the transit time of cargoes from the U.S. gulf, positioning Canada's Pacific Coast location as a strategic advantage in global LNG markets.

### Part 2 - Five Conditions to Success - LNG Canada Phase I and Coastal GasLink

- LNG Canada Phase I and Coastal GasLink Pipeline were developed with the B.C. Five Conditions at the forefront: Opportunities for British Columbians; jobs and training; Fair Return for B.C. resources; Respect and make partners of First Nations; Protect B.C.'s air, land, water and including its climate commitments; demonstrate benefits to communities.
- More than 50,000 Canadians contributed to the construction of LNG Canada Phase I, while Coastal GasLink supported over 25,700 full-time equivalent jobs in British Columbia.
- LNG development is projected to generate approximately \$23 billion in government revenues over 40 years, while LNG Canada is expected to contribute approximately \$15 million annually in municipal and regional taxes.
- More than \$5.8 billion in British Columbia contracts were awarded during project development, including over \$4.9 billion to Indigenous-owned and local area businesses.
- Agreements were reached with the 20 First Nations along the project corridor. Of these, 16 First Nations took part in an option to acquire a 10 per cent equity stake in Coastal GasLink.
- Between 2019 and 2023, own-source revenues among First Nations in the project corridor increased by 159 per cent, enabling greater investment in community priorities including education, infrastructure and cultural programs.
- LNG Canada is expected to operate at an emissions intensity approximately 35 per cent below top-performing global LNG facilities and roughly 60 per cent below the global industry average.
- Project investments have supported housing, healthcare, childcare, workforce training, scholar

- ships, Indigenous cultural initiatives and emergency response infrastructure throughout corridor communities.
- Community indicators have improved during the project period, including a 34 per cent increase in after-tax household income, a 19 per cent increase in registered nurses per capita and rising school completion rates.

### **Part 3 - The Power of Yes**

- A baseline of social progress indicators in the Communities of Interest in the project corridor shows that some indicators track above or close to average provincial levels in B.C., but several measures showed more persistent gaps: slower income growth compared to the province, higher rates of houses needing major repairs, and a sustained shortfall in post-secondary attainment.
- Social Progress modeling compared the trajectory of social indicators in the Communities of Interest from 2021 to 2031 for three scenarios: a No Project scenario (LNG Canada Phase I and CGL were not built); a Project Scenario (LNG Canada Phase I and CGL are built), and a Phase II Scenario (LNG Canada and CGL are built, as well as Cedar LNG, LNG Canada Phase II and Ksi Lisims LNG).
- Analysis showed:
  - In 2031, average household income in corridor communities is projected to reach \$152,000 with LNG Canada and Coastal GasLink and \$159,000 with the addition of Phase II projects, compared with \$133,000 in a No Project scenario.
  - In the Phase II Scenario, approximately 5,500 additional households are projected to achieve housing affordability in 2031, while up to 6,630 additional residents could obtain trade, vocational or university credentials.
  - With the Project and Phase II Scenario, Indigenous language knowledge is projected to increase, compared to baseline and the No Project scenario, reversing previous declines and supporting an important long-term cultural goal across participating communities.
  - The social progress analysis suggests that when major resource projects are paired with workforce development, Indigenous partnership, community investment and environmental stewardship, they deliver both national and local community benefits.

### **Part 4 - The Upstream Engine of Canada's LNG Story**

- Growth in Canadian LNG exports is expected to drive substantial future production increases where natural gas production is forecast to increase from about 19 billion cubic feet per day (bcf/d) in 2025 to 25 bcf/d by 2030. B.C. production is projected to rise from approximately 7.5 bcf/d to 12 bcf/d by 2030.
- The upstream natural gas industry is a major economic driver in British Columbia contributing approximately \$5.5 billion to B.C.'s GDP in 2024 and supporting the equivalent of 81,100 direct, indirect and induced jobs.

- The industry is a significant driver of government revenues in British Columbia where natural gas royalties are expected to account for 43% of B.C.'s total natural resource revenues in 2026-27, exceeding forestry and mining revenues combined. The industry also contributed approximately \$90 million in provincial income taxes and \$129 million in fees in 2024.
- Indigenous participation in the upstream natural gas industry is significant and includes royalty revenue-sharing agreements with the province, supply chain participation – upstream companies spent an estimated \$162 million with Indigenous suppliers in 2025 – and other contracting, including approximately 85 Indigenous businesses engaged in service and procurement contracts.
- Environmental performance in the upstream natural gas sector has improved faster than production growth due to improvements to methane reduction programs, equipment upgrades, electrification and operational efficiencies. Since 2014, natural gas production increased by 61% while:
  - Total upstream emissions have declined by 24%.
  - Methane emissions have fallen by 51%.
  - Emissions intensity decreased by 53%.
- The upstream sector provides significant opportunities for contractors, equipment suppliers, transportation firms and service providers. Upstream companies spent approximately \$1.4 billion on B.C. supply chains in 2025 with more than 1,600 companies.
- Supports to local communities include food banks, schools, libraries, health services, youth sports, and emergency services. Where companies contributed approximately \$1 million in community organizations in 2025 benefiting over 120 local organizations.

## Conclusions

Overall, the success of major LNG infrastructure in British Columbia and the continued growth of the natural gas industry, is made possible by federal and provincial governments, First Nations and other Indigenous communities, municipalities, labour and industry working together to balance economic opportunity, environmental protection and community interests.

Critically, the growth of LNG in British Columbia has shown that major projects and the natural gas industry are not just about national economic benefits. In concrete ways, they deliver long-term value and opportunities to local communities. The values reflected in B.C.'s approach to LNG development are translating into positive change that has the potential to grow to and beyond 2031.

## THE LNG CORRIDOR

The development of a liquefied natural gas (LNG) export industry represents one of the largest industrial investments in the history of British Columbia. Central to this development is the LNG corridor connecting natural gas production in northeastern British Columbia to export facilities on the province's northwest coast. This corridor includes the Coastal GasLink (CGL) pipeline operated by TC Energy, which transports natural gas approximately 670 kilometres from the Montney gas basin near Dawson Creek to the LNG Canada (LNGC) export facility in Kitimat, British Columbia [1]. At the Kitimat terminal, natural gas is processed and liquefied for export to international markets.

British Columbia's emergence as an LNG exporter is supported by a unique combination of natural advantages. The province sits atop one of North America's largest natural gas resources [2], with the Montney formation representing a globally significant, low-cost supply. Its west coast location provides direct access to key Asian markets, reducing shipping distances compared with other North American export regions [3]. In addition, the region's colder climate improves the efficiency of LNG production by lowering the energy required for liquefaction [3]. Together, these attributes position British Columbia as a competitive supplier in global LNG markets.

At the same time, realizing this opportunity has required overcoming significant physical and logistical challenges. The LNG corridor traverses remote and mountainous terrain across northern British Columbia, requiring the construction of large-scale infrastructure through complex environmental and geographic conditions [4]. Building a 670 kilometre pipeline and associated facilities across this landscape reflects not only engineering complexity, but also a high degree of coordination among governments, industry, Indigenous Nations, and local communities.

This coordination was formalized through the En-

vironmental Assessment (EA) process led by the British Columbia Environmental Assessment Office (BCEAO) for the LNG Canada [5] and Coastal GasLink pipeline projects [6], which played a central role in evaluating how these projects would interact with communities and the surrounding environment. The LNG Canada assessment ran between 2013 and 2015 [7] [8], culminating in the issuance of an Environmental Assessment Certificate in June 2015 [8]. A separate EA process for the Coastal GasLink pipeline was conducted over a similar period and concluded with approval in October 2014 [6] [9].

During the assessment process for both projects, Communities of Interest (COI) were identified, representing the municipalities, Indigenous Nations, and regional stakeholders who could be affected by project development [6] [5]. These northern B.C. communities include approximately 20 municipalities representing roughly 180,000 residents and more than 20 Indigenous governance organizations. Many of these communities are relatively small, geographically remote, and characterized by limited infrastructure capacity compared with larger urban centres in the province<sup>1</sup>.

For communities along the corridor, LNG development presents both opportunities and challenges. Large-scale construction projects can generate significant employment, business activity, and investment [10]. At the same time, rapid industrial development can place pressure on local housing markets, transportation networks, health services, and other community infrastructure [5].

Through the EA processes, a broad range of considerations and concerns were identified. Communities raised economic concerns related to labour availability, wage pressures, and access to employment and training opportunities. Social impacts were also highlighted, including housing affordability and availability, as well as pressures

1 See Appendix A for the full list of Communities of Interest included in this research.

on infrastructure, healthcare, and emergency response services. Environmental considerations were central, including air quality, greenhouse gas emissions, impacts to wildlife and marine mammals, and risks associated with accidents or spills. Indigenous Nations also emphasized the importance of protecting Aboriginal interests, including traditional knowledge, access to resources and country foods, and meaningful participation in consultation processes.

In response, the planning and development of LNG Canada and Coastal GasLink involved extensive engagement and coordination with Communities of Interest. Through the Environmental Assessment process and subsequent project development phases, thousands of formal consultations, technical reviews, and community meetings helped shape project design, mitigation measures, and benefit-sharing approaches [11]. This process reflected a shift toward more collaborative models of development, where community input informed decisions related to environmental protection, workforce participation, infrastructure planning, and long-term economic inclusion.

This collective effort between the project proponents and local communities has been central to advancing LNG development in British Columbia. It has helped align large-scale infrastructure with local priorities, balance economic opportunity with community capacity, and establish partnerships that extend beyond project construction into long-term operations. In doing so, the LNG corridor represents not only a connection between resource basins and global markets, but also a coordinated approach to development shaped by those who live along it.

## THE FIVE CONDITIONS TO YES

In 2018, the Government of British Columbia (“the Province”) introduced a new policy framework to guide the development of the LNG industry. The

framework was designed to ensure that major LNG projects proceed only if they deliver broad public benefits and align with the province’s environmental and reconciliation commitments. At the core of this framework was a set of conditions that LNG projects must satisfy in order to demonstrate that development can generate economic opportunity while respecting environmental limits and the rights and interests of Indigenous Peoples.

Initially framed as four conditions, the Province required LNG projects to:

- Guarantee jobs and training opportunities for British Columbians,
- Guarantee a fair return for B.C.’s natural resources,
- Respect and partner with First Nations,
- Protect B.C.’s air, land and water, including living up to the Province’s climate commitments [12].

The framework was later expanded to five conditions, adding an explicit expectation that projects demonstrate tangible benefits and mitigation measures for communities most affected by development [13]. Together, these conditions established the principles against which projects such as Coastal GasLink (CGL) and LNG Canada (LNGC) were assessed.

## WHEN OUR NATION BUILDS

This report is structured to provide an overview of representative project actions taken by CGL and LNGC in support of the Province of British Columbia’s five LNG conditions, as well as requirements established through the Environmental Assessment process.

Given the breadth of initiatives undertaken during these projects, this report is not exhaustive. Instead, it highlights a subset of actions under each

condition to illustrate how the projects have responded to key commitments and concerns from the assessments. The specific actions presented may differ between CGL and LNGC, reflecting the distinct roles and activities of each project along the LNG corridor.

## Key Findings

Under Condition 1, workforce development and local hiring initiatives responded directly to early concerns about reliance on non-local labour. More than 50,000 Canadians have directly contributed to building LNG Canada Phase I [14] while over 25,700 full-time equivalent jobs were created in B.C. for the CGL pipeline construction [15]. Moreover, over 300 full-time, permanent operational roles with LNGC have been created [14]. In addition, LNGC and CGL invested more than \$11.7 million in workforce development between 2019 and 2024 [14] [16], helping strengthen local skills capacity and support long-term participation in the regional economy.

Under Condition 2, LNG development is expected to generate substantial long-term public revenue, with approximately \$23 billion in government revenues over 40 years [13], or roughly \$575 million annually. This level of revenue could fund, for example, the equivalent of hiring more than 9,300 nurses<sup>2</sup>, illustrating how resource development can translate into sustained public benefits.

Under Condition 3, measurable progress in economic participation is reflected in a 159% increase in own-source revenues among participating Nations since 2019, reflecting growing economic capacity.<sup>3</sup>

Under Condition 4, LNG Canada was designed for approximately 0.14 to 0.15 tonnes of CO<sub>2</sub> per tonne of LNG [17], which is about 35% below top-performing global facilities and 60% below the global average [13]. Canada's upstream natural gas sector also maintains relatively low

methane intensity at approximately 0.12 kg per GJ, nearly ten times lower than the highest-emitting producers globally [18].

Under Condition 5, several indicators point to broader social and economic changes within corridor communities. Between 2015 and 2024, after-tax household income increased by 34%, rising from \$78,900 to \$105,500 [19]. Over the same period, registered nurses per 100,000 residents increased by 19% (from 609 to 727) [20], school completion rates rose from 71% to 79% [21], and the share of students learning about Indigenous Nations doubled from 21% to 41% [22].

Taken together, these findings provide a high-level view of how actions taken by LNG Canada and Coastal GasLink align with the Province's five LNG conditions and the broader outcomes observed across Communities of Interest. To further illustrate how these commitments have been implemented in practice, Table 1 provides a high-level overview of how CGL and LNGC have responded to each condition, highlighting one representative action taken by each project in relation to the five provincial requirements. These examples are intended to be illustrative of the types of initiatives undertaken by the project proponents to advance employment and training, Indigenous partnership, environmental protection, community well-being, and economic returns for the province.

2 Value is based on nurse salaries from [57] [58]

3 Community expenditure and revenue data were sourced from the 2019–2023 Annual Reports and Financial Statements of First Nations identified as 'Communities of Interest' under the CGL and LNGC projects.

**HIGHLIGHTS OF ACTIONS CONDUCTED BY COASTAL GASLINK (CGL) AND LNG CANADA (LNGC) IN ACCORDANCE WITH THE FIVE CONDITIONS OUTLINED BY THE PROVINCE**

CGL ACTIONS	LNGC ACTIONS
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**OPPORTUNITIES FOR BRITISH COLUMBIANS AND GURANTEES OF JOBS AND TRAINING**

<p><b>\$1.7M</b> On skills training and pre-employment programs [16]</p>	<p><b>\$10M</b> Invested in workforce development programs [14]</p>
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**FAIR RETURN**

<p><b>\$26M</b> Per year to be contributed to property taxes during operation [15]</p>	<p><b>+\$5.8B</b> Awarded in contracts and subcontracts to local, Indigenous and other businesses in B.C. [14]</p>
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**RESPECT AND PARTNER WITH FIRST NATIONS**

<p><b>16</b> First Nations signed equity options to become CGL owners [23]</p>	<p><b>+\$500M</b> Contract with HaiSea Marine, a joint venture between the Haisla Nation and North Vancouver-based Seaspan [14]</p>
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**PROTECT AIR, LAND, WATER – LIVING UP TO CLIMATE COMMITMENTS**

<p><b>140,000 tCO<sub>2</sub>e</b> Abated through the LDAR program [11]</p>	<p><b>\$1.5M</b> Donated to the district of Kitimat's organics facility [24]</p>
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**BENEFITS TO COMMUNITIES**

<p><b>750</b> Scholarships and bursaries have been awarded since 2014 through post-secondary institutions in Northern B.C. [16]</p>	<p><b>\$1.25M</b> Donated to the Kitimat General Hospital Foundation for the purchase of a new CT scanner [14]</p>
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# 1. OPPORTUNITIES FOR BRITISH COLUMBIANS AND GUARANTEES OF JOBS AND TRAINING

“Projects like LNG Canada are the reason B.C. will be the economic engine of a more independent Canada. It creates good jobs, opportunities that let young people build a life here in the North and generates the revenue we need to improve public services everyone relies on.”

Premier David Eby,  
commenting on the first LNG  
Canada cargo, June 30, 2025 [25]

One of the central commitments of the Province's LNG framework was to ensure that major LNG developments create meaningful employment and training opportunities for British Columbians. During the project review and consultation processes, Indigenous governments, local municipalities, and regional stakeholders emphasized the importance of ensuring that the economic opportunities created by LNG development were accessible to people living in the region [5].

At the same time, these communities also raised concerns about the scale of industrial development and the potential pressures associated with a large temporary workforce, including the possibility that sudden population increases tied to major construction could strain housing availability, transportation systems, and local services such as healthcare, education, and emergency response [26] [27]. Communities also expressed concern that skilled positions could be filled by workers from outside the region [27], limiting long-term benefits for residents.

In response to these concerns, workforce development initiatives became an important component of project planning and implementation. Investments in training and workforce development served a dual purpose: building the skills

and qualifications of residents in the region while increasing local participation in the workforce and reducing reliance on large fly-in, fly-out labour pools. Strengthening local workforce capacity also helped ensure that employment benefits remained in the region and that communities could sustain the economic opportunities associated with LNG development over the long term.

Across both projects, these efforts translated into significant workforce activity and training investments. Together, LNG Canada and Coastal GasLink invested more than \$11.7 million in skills training, workforce development, and pre-employment programs [14] [16], helping residents across northwestern British Columbia gain the qualifications needed to participate in the region's growing industrial sector.

**+\$11.7M**

Invested in skills training, workforce, development, and pre-employment training

Construction activities generated substantial employment across the province, with Coastal GasLink creating more than 25,700 full-time equivalent jobs in British Columbia [15]. At the same time, LNG Canada's operations have supported more than 300 permanent full-time jobs [14], providing stable, long-term employment opportunities in the region.

**+\$25.7K**

FTE jobs in B.C. created by CGL during construction

## Workforce Pipelines That Outlast Projects

“These aren’t short construction jobs that disappear. Now you’ve got 20-, 30-, 40-year projects.

You can start as a deckhand on day one and map out your path to captain, engineer, even president. There’s a real runway to build a lifetime career here”

Jordan Pechie,  
President, Seaspan Marine  
Transportation

In addition to supporting workers already entering the labour market, LNG Canada and Coastal GasLink invested in programs aimed at preparing younger generations for future careers in skilled trades and technical fields. Many of these initiatives focused on providing early exposure to technical skills through school-based programming, scholarships, bursaries, and hands-on training opportunities. By introducing youth to career pathways linked to regional industries, these programs sought to ensure that the economic opportunities associated with LNG development remain accessible to local residents over the long term.

A key component of these efforts involved strengthening access to education and post-secondary training. Coastal GasLink provided 750 scholarships, including 354 awarded to Indigenous students in northern British Columbia [16], helping reduce financial barriers for students pursuing higher education and technical training.

**750**

2014-2024

Scholarships provided by CGL

CGL also invested more than \$1.57 million in post-secondary partnerships across northern B.C., supporting educational institutions and programs that prepare students for careers in skilled trades and industrial operations. Moreover, since 2014,

TC Energy has contributed over \$1.09 million to education and training initiatives in communities within the project area, further supporting local capacity building [16].

**+\$1.57M**

Post-secondary partnerships in northern BC by CGL

Programs were also designed to connect training directly to employment opportunities in the region. LNG Canada partnered with Coast Mountain College and the British Columbia Institute of Technology to support a Fourth-Class Power Engineering Program [28], helping train operators with the technical expertise required for large-scale energy facilities. By linking educational institutions with industry needs, initiatives such as this helped create clearer pathways from classroom training into long-term local employment.

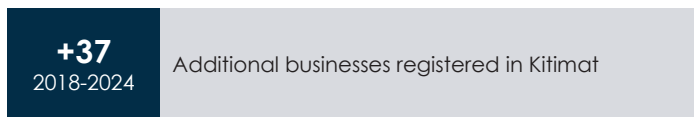
### Community Trends

Taken together, the initiatives described in this section demonstrate how workforce development has been positioned as a central component of LNG development along the corridor. Investments in training programs, apprenticeships, scholarships, and youth engagement have aimed to build a regional workforce capable of supporting both the construction and long-term operation of major energy infrastructure.

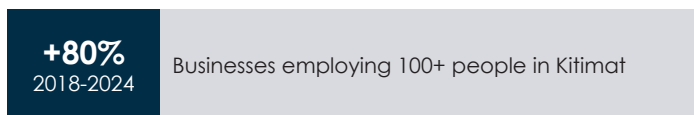
These initiatives have sought to address concerns raised during the assessment process by expanding opportunities for local residents to participate in skilled trades and technical occupations while reducing reliance on large external labour pools. By strengthening local workforce capacity and creating clearer pathways from education into employment, these programs support the broader goal of ensuring that the economic opportunities associated with LNG development translate into lasting benefits for communities along the corridor.

Alongside the workforce and education initiatives described above, several indicators provide additional context on how communities along the LNG corridor evolved during the project period. While many factors influence local economic and social conditions, changes in business activity and educational attainment help illustrate how the broader community environment has developed during the same timeframe as LNG infrastructure construction.

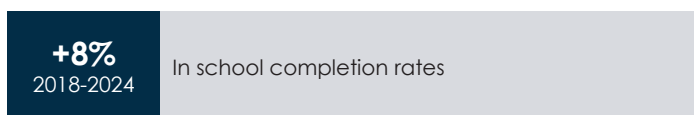
In Kitimat, the number of registered businesses increased from 999 in 2018 to 1,036 in 2024 [29], reflecting gradual growth in the local business community.



Over the same period, the number of businesses employing more than 100 people increased by approximately 80% [29], indicating the presence of larger employers operating in the area. Although these changes cannot be attributed to any single project or initiative, they provide context for how the local economic landscape has evolved alongside major industrial activity and increasing demand for skilled labour, services, and technical expertise.



Educational attainment within communities along the LNG corridor also shifted during this period. B.C. education data indicate an increase of 8% in school completion in the local communities [22]. These trends suggest a gradual strengthening of the region's educational attainment, reflecting both long-term demographic changes and ongoing investments in education and training.



## 2. FAIR RETURN FOR NATURAL RESOURCES

“The LNG Canada project provides good reason for British Columbians to feel upbeat. Nowhere else in Canada will see as big a capital spending boost this year as B.C., where expenditures will rise 12.9%. We project real GDP growth of 2.5% in both 2019 and 2020.”

BMO Economics,  
commenting on B.C.'s economic  
outlook in March 2019 as compared to  
real GDP growth in 2018 at 1.7% [30]

### From Constrained to Connected: Sharing the Returns of Global Market Access

Condition 2 of the Province's LNG framework is to ensure that the development of British Columbia's natural gas resources generates a fair and sustained return for the public. This includes not only fiscal revenues, but also broader economic benefits associated with increased market access, production, and value creation across the province.

Prior to LNG development, British Columbia's natural gas sector was largely constrained to North American markets [4]. In 2017, the United States became a net exporter of natural gas for the first time in decades, driven by rapid growth in shale basins such as the Marcellus and Utica [31]. This shift introduced increased competition and placed downward pressure on prices within continental markets.

The development of LNG Canada's export facility in Kitimat, representing the largest private-sector investment in Canadian history [32], introduced a new pathway for British Columbia's natural gas to reach global markets, particularly in Asia. By connecting upstream production to international demand, LNG infrastructure enables the province to

diversify its customer base and capture greater value from its natural resources.

Expanded market access also has implications for Indigenous participation in resource development. For Treaty 8 First Nations and other Indigenous communities involved in upstream and midstream activities, access to global markets supports long-term economic opportunities tied to resource stewardship, ownership, and participation in the natural gas value chain.

### Return on Investment

The development of LNG infrastructure is expected to generate long-term fiscal benefits for British Columbia and Canada through taxation, royalties, and broader economic activity. Over a projected 40-year operating period, the projects are expected to contribute approximately \$23 billion in government revenues [13], representing an average of approximately \$575 million annually. These revenues are part of the public funding base that supports essential services and infrastructure across the province.

**2.4Yrs**  
\$575M

Of wildfire response and recovery covered by the annual tax generation

At the local level, LNG Canada is expected to contribute approximately \$15 million annually in municipal and regional taxes during operations [7], providing a stable source of revenue for communities such as Kitimat and surrounding regions. These funds can support local infrastructure, services, and long-term community planning.

**852**  
\$575M

Nurse salaries covered by the annual tax generation

Framed in practical terms, these revenues represent significant public value. Annual tax contribu-

tions at this scale are comparable to the funding required to support large-scale public services, including healthcare staffing and emergency response capacity. Over time, this sustained revenue stream contributes to the Province's ability to invest in public priorities such as healthcare, education, and infrastructure.

### Supporting Production Through Market Access

Access to global markets has also influenced the trajectory of natural gas production in British Columbia. Prior to LNG development, industry analysis suggested that without new export options, production growth would be constrained. A 2016 analysis by the Canadian Association of Petroleum Producers projected that, in the absence of LNG export capacity, production in British Columbia would plateau at approximately 3.5 to 4 billion cubic feet per day (Bcfd) [33].

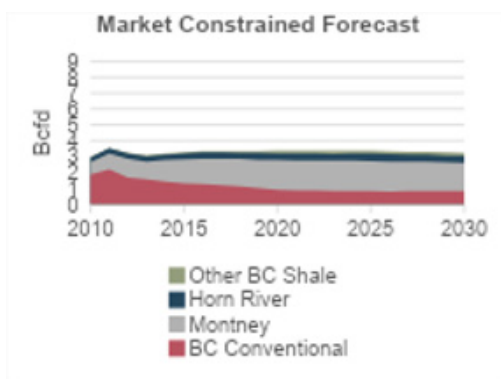


Figure 1: Market constrained forecast, billion cubic feet per day (Bcfd).

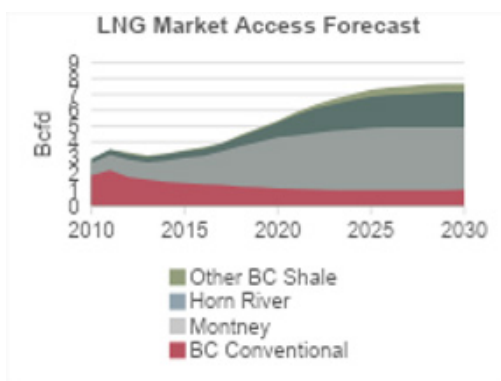


Figure 2: Market access forecast, billion cubic feet per day (Bcfd.)

With the development of LNG Canada and other proposed LNG projects, production is now tracking toward approximately 7 Bcfd [33], reflecting a higher level of sustained activity in the upstream sector. While multiple factors influence production levels, access to international markets provides a more stable and diversified demand base, supporting long-term investment and planning within the industry.

This shift highlights the role of LNG infrastructure in enabling the province to move from a constrained market position toward one that is more connected to global energy systems.

### Strengthening Supply Chains Across British Columbia

In addition to direct fiscal returns and upstream activity, LNG development has contributed to the expansion of supply chain opportunities across British Columbia. As major infrastructure projects progressed, demand for goods and services created opportunities for businesses across multiple sectors, including construction, transportation, manufacturing, environmental services, and professional services.

Over \$5.8 billion in B.C. contracts and subcontracts to date including over \$4.9 billion to Indigenous-owned and local area businesses [2]. Between 2018 and 2024, 57% of communities experienced an increase in supply chain spending, reflecting broader participation in project-related economic activity [34]. These opportunities extend beyond immediate project needs, supporting the development of local and regional business capacity.

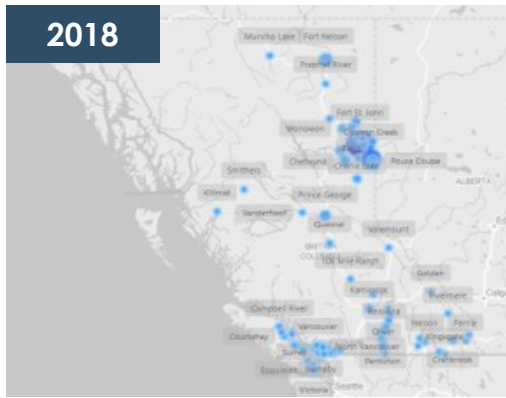


Figure 3: B.C. supply chain for upstream sector, 2018.

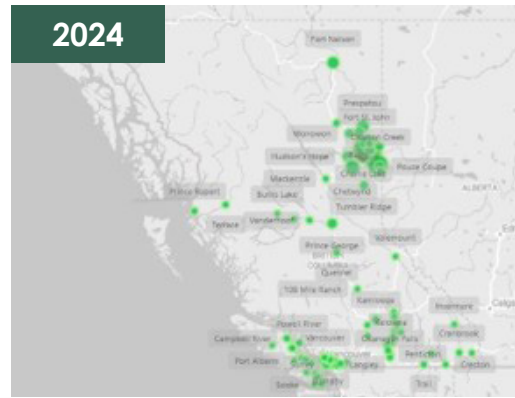


Figure 4: B.C. supply chain for upstream sector, 2024.

The growth of LNG-related supply chains contributes to a broader industrial ecosystem in British Columbia. Participation in large-scale projects allows businesses to build experience, expand operations, and position themselves for future opportunities both within and beyond the energy sector. Over time, this can support a more diversified and resilient provincial economy.

Local participation in supply chains also reinforces the connection between resource development and community-level economic benefits. By engaging businesses across the province [35], LNG development helps distribute economic activity more widely, supporting both regional and provincial growth.

### UPSTREAM GAS FIELDS

- Drilling and well services
- Equipment rentals and maintenance
- Environmental monitoring and site reclamation
- Local transportation and logistics (fuel, gravel, aggregates)
- Camp services and catering for field crews
- Power generation and electrical distribution

### WATER & UTILITY SYSTEMS

- Water and wastewater treatment plant suppliers
- Chemical dosing, filtration, and monitoring providers
- Electrical control and automation vendors
- Operations technicians and maintenance contractors
- Civil and utility integration contractors

### MIDSTREAM INFRASTRUCTURE

- EPC oversight and logistics coordination
- Welding, coating, and field inspection
- Heavy haul and construction transport
- Right-of-way (ROW) development: surveying, land clearing, grading, and reclamation along the pipeline corridor
- Indigenous and community contracting for ROW construction, environmental monitoring, and access management
- Workforce housing, mobile field offices, and temporary access roads

## CONSTRUCTION & WORKFORCE SUPPORT FACILITIES

- Camp and catering providers (e.g., Civeo Sitka Lodge, Cedar ValleyLodge)
- Prefabricated building manufacturers and fit-out trades
- Waste management, sanitation, and water utilities operators
- Communication, IT, and networking service firms
- Transportation, air charter, and supply logistics

## LNG PLANT & TERMINAL SITE

- EPC and fabrication management
- Civil and concrete works, piling, and drainage
- Mechanical, electrical, and instrumentation contractors
- Port logistics, lifting, and crane operations
- HVAC, plumbing, and industrial insulation services
- Safety, security, and emergency response staffing
- Indigenous procurement and training partnerships

## OPERATIONS, MAINTENANCE & EXPANSION

- Maintenance, turnaround, and reliability contractors
- Instrumentation and analyzer servicing
- Electrical and mechanical spares distribution
- Coating, insulation, and fireproofing maintenance
- Safety training, inspection, and emergency management
- Long-term Indigenous business partnerships for site support
- Consumables
- Commercial, legal, financial, risk, regulatory, insurance, utilities, IT etc.

### 3. RESPECT AND PARTNER WITH FIRST NATIONS

“Seeing my Nation move from being consulted to owning our own project—Cedar LNG—is nothing short of revolutionary. It means the tables have turned. Instead of being asked for permission, we set the terms. Instead of watching others profit from our land, we are building prosperity for our people. For elders who remember exclusion and for youth who now see a future shaped by their own Nation, it’s a moment of pride, healing, and hope. Cedar LNG isn’t just a project—it’s a blueprint for Indigenous-led development across the country.”

Crystal Smith,  
Former Chief Councilor, Haisla Nation

#### A New Framework for Partnership and Ownership

Partnership with First Nations is a foundational element of British Columbia’s approach to LNG development, reflecting the importance of advancing resource projects in a manner that supports reconciliation and shared economic participation. Given that LNG infrastructure is developed across the traditional territories of numerous Indigenous Nations, this condition reflects the importance of advancing resource development in a manner that supports reconciliation, recognizes Indigenous rights, and creates meaningful opportunities for participation and ownership.

The development of CGL and LNGC represents a shift in how major energy infrastructure projects engage with Indigenous communities. Agreements were established with the all the elected governments of the First Nations along the pipeline route and LNG footprint [36], creating one of the most comprehensive Indigenous participation frameworks in Canadian energy development.

These agreements extend beyond consultation, embedding Indigenous Nations as partners in project development, construction, and long-term operations.

A key feature of this model is the transition toward equity participation. Sixteen First Nations have committed to an option to invest in a 10% equity stake in the Coastal GasLink pipeline [37], providing a long-term revenue stream tied to infrastructure operations. This approach reflects a broader evolution in the sector, where Indigenous Nations are increasingly participating not only as stakeholders, but as owners of major energy assets.

**10%**

Equity option in CGL pipeline for 16 Nations

This shift toward ownership is further illustrated by the Haisla Nation’s leadership in advancing the Cedar LNG project, in which it holds a 50.1% equity ownership stake, representing a significant milestone in Indigenous participation in LNG development [38]. Supported in part by a \$1.4 billion loan from the First Nations Finance Authority (FNFA), the largest loan issued to date [39], the project is a landmark achievement in Indigenous-led energy development in Canada.

**\$1.4B**

Loan for Haisla Nation on the Cedar LNG Project

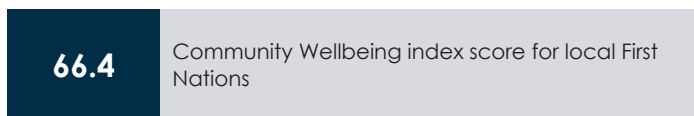
## Wellbeing in the Corridor

“Equity in Coastal Gaslink has been transformative in the way large projects can have added long lasting benefits following construction. Ownership by our nation and others means that project profits stay in the region instead of leaving. Local people use these revenues to build locally and buy locally, creating a positive ripple effect for our communities, from the corner store owner to the contractor.”

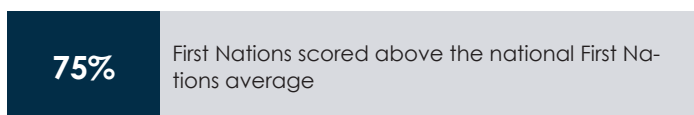
Justin Napoleon ,  
Director Economic Development and  
Former Chief, Saulneau First Nation

Beyond economic participation, changes in community wellbeing provide additional context for how Indigenous communities along the LNG corridor have evolved during the project period. The First Nations Community Wellbeing Index, which measures outcomes across education, income, employment, and housing, offers one lens through which to assess these changes.

Based on 2021 Census data, Indigenous Nations participating in LNG and pipeline development scored an average of 66.4 points, exceeding the national First Nations average of 62.4 points, and narrowing the gap with non-Indigenous communities, which averaged 78.7 points [40].

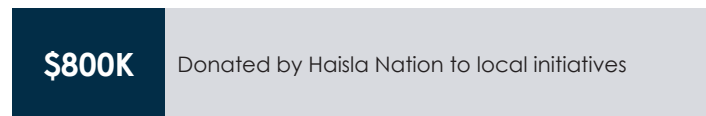


Approximately 75% of participating Nations scored above the national First Nations average [40], suggesting relatively stronger outcomes across key socio-economic indicators.



While many factors contribute to community wellbeing, these results provide context for how economic participation, employment opportunities, and revenue generation may coincide with broader improvements in quality of life.

At the same time, Indigenous Nations have demonstrated leadership in reinvesting economic gains into community priorities. For example, the Haisla Nation contributed \$800,000 in donations to local initiatives, including the Kitimat General Hospital Foundation and the Kitimat Dementia Care Project [41] [42]. The Nation has also achieved Financial Management System (FMS) certification from the First Nations Financial Management Board, meeting one of the highest national standards for financial governance [43].



## Measurable Participation and Economic Inclusion

“When First Nations are partners in natural gas development, we see more than projects— we see progress. Every contract, every training program, every equity share strengthens our Nations’ ability to invest in our people and shape our own future. That’s the real measure of success.”

Karen Ogen,  
President First Nations Natural Gas  
Alliance

The scale of Indigenous participation in LNG-related development is reflected in procurement, employment, and supply chain activity.

Indigenous-affiliated supply chain spending in British Columbia’s natural gas sector has grown at

four times the rate of total supply chain spending between 2018 and 2024 [34], indicating a growing level of participation and capacity within Indigenous business communities. These opportunities have supported the expansion of Indigenous-owned enterprises and strengthened economic foundations within communities along the LNG corridor.

**4x Growth**  
2018-2024

For Indigenous affiliated supply chain compared to overall supply chain

Partnership models have also supported Indigenous leadership in the sector. LNG Canada awarded a \$500 million contract to HaiSea Marine, a joint venture between the Haisla Nation and Seaspan, to provide tugboat services for harbour and escort operations using a fleet of battery-powered, low-emission vessels [14]. This initiative represents both a major commercial opportunity and a step forward in Indigenous-led innovation within the marine and energy sectors.

**\$500M**

Contract between LNGC and HaiSea Marine, a Haisla Nation joint venture

## Shared Value Creation and Self-Determined Investment

A key dimension of Indigenous partnership in LNG development is the establishment of formal agreements that enable long-term value sharing across the natural gas value chain. These agreements provide a structured mechanism through which Indigenous Nations participate in the economic returns associated with resource development, supporting both financial autonomy and community-driven investment.

Due to the commercial confidentiality of agree-

ments between First Nations and project proponents, publicly available data was used to assess Condition 3. Sources include Government of British Columbia disclosures, as well as First Nations' annual reports and financial statements, providing a representative view of progress across the LNG corridor. This includes participation in revenue sharing, equity opportunities, and growth in own-source revenues, alongside increased investment in community priorities such as education, housing, and services. While not exhaustive, this methodology demonstrates how Condition 3 is being advanced in practice based on verified data, while respecting legal and commercial sensitivities.

To illustrate the scope of these arrangements, When Our Nation Builds compiled a summary of agreements<sup>4</sup> between First Nations associated with the LNG Canada and Coastal GasLink projects and the Government of British Columbia. These agreements span the full LNG value chain, including upstream production, midstream transportation, and downstream export infrastructure, and reflect the breadth of Indigenous participation in LNG-related development.

As shown in Table 2, the agreements are organized by First Nation and identify participation across three primary provincial frameworks:

- Treaty 8 Revenue Sharing Agreement
- Natural Gas Pipeline Benefits Agreement (Coastal GasLink Pipeline Project)
- LNG Benefits Agreement and LNG Coastal Fund Agreement

These agreements were signed between First Nations and the Province of British Columbia be-

<sup>4</sup> The summarized agreements focus specifically on those directly related to the LNG value chain and do not include other agreements between First Nations and the Province of British Columbia. For example, certain Nations participate in additional arrangements such as the First Nations Limited Partnership (FNL) Pacific Trails Pipeline Economic Participation Agreement, which are outside the scope of this summary. In some cases, variations in agreement structures also reflect broader regional arrangements. For instance, West Moberly First Nations and Prophet River First Nations are parties to the Blueberry River First Nations Implementation Agreement (2023) Schedule L Revenue Sharing Appendix 1A (<https://www2.gov.bc.ca/gov/content/environment/natural-resource-stewardship/consulting-with-first-nations/first-nations-negotiations>), which includes a revenue sharing appendix. However, publicly available Treaty 8 Natural Gas Revenue Sharing Agreements for these Nations were not identified at the time of this analysis.

tween 2014 and 2024<sup>5</sup>, establishing a foundation for long-term benefit sharing tied to natural gas development. Together, they demonstrate how

value generated from resource development is distributed across multiple regions and stages of the LNG corridor.

## AGREEMENTS BETWEEN THE INDIGENOUS NATIONS OF INTEREST AND THE PROVINCE

Indigenous Nation	Revenue Sharing with the Province		
	Treaty 8 Revenue Sharing Agreement	Natural Gas Pipeline Benefits Agreement Coastal GasLink Project	LNG Benefits Agreement
Blueberry River First Nations	X		
Coastal First Nations Great Bear Initiatives Society			X
Doig River First Nation	X	X	
Fort Nelson First Nation	X		
Gitga'at First Nation			X
Gitxaala Nation			X
Haisla Nation		X	
Halfway River First Nation	X	X	
Kitselas		X	X
Kitsumkalum			X
Lax Kw'alaams			X
Lheidli-T'enneh		X	
McLeod Lake	X	X	
Metlakatla First Nation			X
Nadleh Whuten		X	
Nak'azdli Whut'en		X	
Nee-Tahi-Buhn		X	
Prophet River First Nation	X		
Saik'uz First Nation		X	
Saulteau First Nations	X	X	
Skin Tyee		X	
Stellat'en First Nation		X	
Ts'il Kaz Koh		X	
West Moberly First Nations	X	X	
Wet'suwet'en First Nation		X	
Witset First Nation		X	
Yekooche First Nation		X	

5 All indexed agreements were sourced from the Government of B.C. website at <https://www2.gov.bc.ca/gov/content/environment/natural-resource-stewardship/consulting-with-first-nations/first-nations-negotiations>, with the last update dated September 19, 2024. As such, any agreements reached after this date are not reflected in the table.

Building on the overview of provincial revenue-sharing frameworks, additional agreements have been established directly between project proponents and First Nations, further shaping participation across the LNG corridor. These agreements reflect project-specific arrangements that support employment, contracting, and long-term economic involvement alongside the broader provincial benefit-sharing structures.

As shown in Table 3, Indigenous partnership and equity agreements reached by 2024 can be understood across two key dimensions of participation. The table outlines project-level agreement types publicly reported between First Nations and project proponents. These include agreements such as the LNG Canada 400 MMcf/d Supply Agreement [38] and the Coastal GasLink Project Agreements [23], which establish frameworks for participation in areas such as employment, procurement, environmental monitoring, and community investment. Together, these agreements complement provincial frameworks and formalizing relationships between individual Nations and project developers.

In addition to these benefit agreements, the CGL project also incorporates equity participation mechanisms, reflecting a further evolution in Indigenous involvement in major infrastructure. Participating Nations have been provided the option to acquire a 10% equity stake in the Coastal GasLink Pipeline Limited Partnership [23], structured through two Indigenous-owned entities: the CGL First Nations Limited Partnership, representing 11 Nations, and the FN CGL Pipeline Limited Partnership, comprising 5 Nations. These structures provide a pathway for long-term revenue generation tied directly to pipeline operations.

Together, the agreements summarized in Tables 2 and 3 illustrate how Indigenous participation in the LNG corridor spans multiple layers ranging from provincial revenue-sharing frameworks to project-specific agreements and equity ownership opportunities. This multi-layered approach reflects a shift toward more comprehensive partnership models, where Indigenous Nations participate across the full lifecycle of resource development.

## NATIONS OF INTEREST AND PROJECT AGREEMENTS

Indigenous Nation	Nations of Interest		Agreements with Indigenous Nations	
	LNGC	CGL	LNGC 400 MMcf/d Supply Agreement	CGL Project Agreement
Blueberry River First Nations		X		X
Cheslatta Carrier Nation				X
Doig River First Nation		X		X
Gitga'at First Nation	X			X
Gitxaala Nation	X			
Haisla Nation	X	X	X	X
Halfway River First Nation		X		X
Kelly Lake Métis Settlement Society		X		
Kitselas	X	X		
Kitsumkalum	X			
Lax Kw'alaams	X			
Lheidli-T'enneh		X		X
McLeod Lake		X		X
Métis Nation of BC		X		
Metlakatla First Nation	X			
Nadleh Whuten		X		X
Nak'azdli Whut'en		X		X
Nee-Tahi-Buhn		X		X
Saik'uz First Nation		X		X
Saulteau First Nation		X		X
Skin Tyee		X		X
Stellat'en First Nation		X		X
Ts'il Kaz Koh		X		X
West Moberly First Nations		X		X
Wet'suwet'en First Nation		X		X
Witset First Nation		X		X
Yekooche First Nation		X		X

Importantly, through these frameworks, participating Nations generate growing own-source revenues.<sup>6</sup>

Between 2019 and 2023, total own-source revenue among participating Nations increased by approximately 159%, with commercial services

representing the largest source of non-governmental income.

**159%**  
2019-2023

Increase in own source revenue for local First Nations

<sup>6</sup> According to the Government of Canada, "Own-source revenue (OSR) is the revenue that an Aboriginal government raises by collecting taxes and resource revenues or by generating business and other income. Under self-government agreements, Aboriginal governments use some of this revenue to contribute to the costs of their own operations, such as providing programs and services to their citizens. Many Indigenous groups are able to generate OSR." [59]

By 2023, own-source revenue accounted for an average of 36% of annual operating budgets, reflecting a growing level of financial autonomy.

**36%**  
2023

Average share of annual operating budget from own-source revenue

As revenues increased, Nations reinvested in their communities. Median annual total expenditure on community development was approximately \$7.2 million from 2019 to 2023. As shown in Figure 5, annual investment in community development by First Nations in the LNG Corridor increased by approximately 68% between 2019 and 2023. Education emerged as the largest area of expenditure, while spending on community services more

than doubled, alongside significant growth in economic development initiatives.

**\$7.2M**

Median annual spending on community development

These trends highlight how revenue-sharing frameworks and participation in LNG-related development can support long-term, self-directed investment toward local priorities, such as education, housing, and community services. By enabling Indigenous Nations to generate and allocate their own revenues, these agreements contribute not only to economic participation, but also to strengthened local capacity and more resilient communities over time.

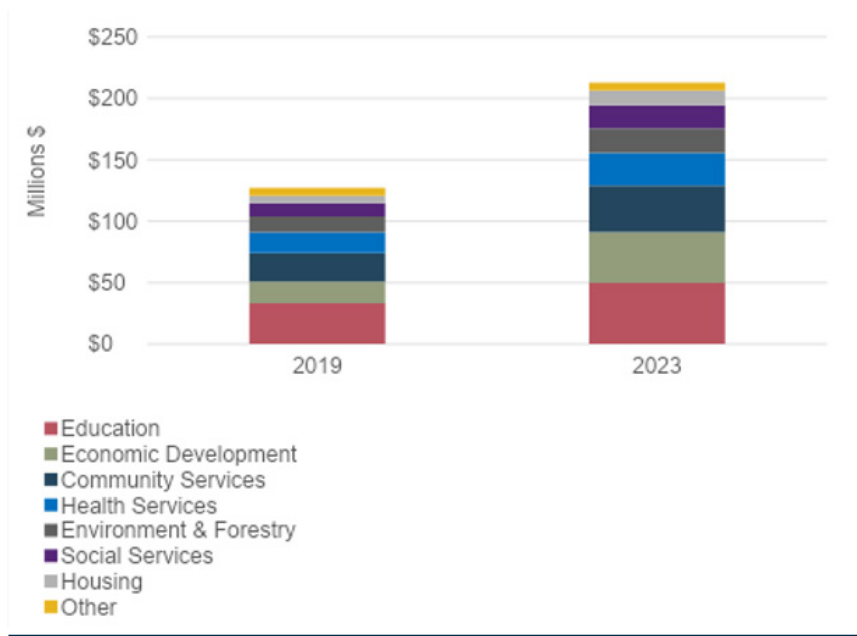


Figure 5: Spend by First Nations on community development.

7 Community expenditure and revenue data were sourced from the 2019–2023 Annual Reports and Financial Statements of First Nations identified as ‘Communities of Interest’ under the CGL and LNGC projects.

## Engagement, Capacity Building, and Community Investment

“We found all the best people who worked on CGL and brought them to work on PRGT. We told them, ‘everyone wants us to fail, and we are going to prove them wrong.’ In the end, we finished the work on time and under budget. It was important that CGL happened, and that those trained workers were available for our project. We will also build more human capital through training as our project advances. These skills will change individual lives for the better and it will be good for our nation”

Andrew Robinson,  
President and CEO, Nisga'a Lisims  
Government

During the Environmental Assessment processes, Indigenous Nations raised a range of concerns related to the potential impacts of LNG development on cultural practices, heritage, and traditional ways of life [5] [6]. These included the protection of traditional land use areas, access to country foods and harvesting sites, and the preservation of Indigenous knowledge, language, and cultural continuity. Concerns were also raised regarding the adequacy of consultation processes, including the need for meaningful engagement, clear communication, and opportunities for Indigenous Nations to influence project design and mitigation measures. In addition, Nations emphasized the importance of incorporating traditional knowledge into environmental assessments and ongoing monitoring, as well as ensuring that potential cumulative effects on Aboriginal rights and interests were fully considered.

Ongoing engagement has therefore been a key component of project development. Since 2012, Coastal GasLink has engaged Indigenous communities through more than 3,100 in-person meetings and over 50,000 communications [11], help-

ing to build relationships and adapt project plans based on community feedback.

During construction, more than 45 Indigenous construction monitors and community liaisons from 20 Nations were present along the pipeline route, supporting environmental oversight and community engagement [44]. These roles provided opportunities for direct participation in project monitoring while strengthening local capacity and knowledge.

45

Indigenous construction monitors and community liaisons

LNG Canada has also supported community initiatives and leadership development. As a Patron member of the Canadian Council for Indigenous Business, the company has supported programs such as the Indigenous Women's Entrepreneurship Fund and leadership recognition initiatives [14]. In addition, LNG Canada contributed \$300,000 to Indspire's Building Brighter Futures program, supporting scholarships, bursaries, and awards for Indigenous students [14].

\$300K

To Indspire's Building Brighter Future program

## 4. PROTECT AIR, LAND, WATER - LIVING UP TO CLIMATE COMMITMENT

“Across PETRONAS Canada, we are passionate about developing our assets responsibly and are proud that Equitable Origin certified that our natural gas is produced with some of the highest environmental, social, and governance standards.”

Shannon Young,  
General Counsel & Vice President,  
External Affairs, PETRONAS Canada

### Setting the Standard for Lower-Emission LNG

Condition four of British Columbia's LNG framework is that natural resource development must proceed in a manner that protects air, land, and water, while aligning with the Province's climate commitments. For LNGC and CGL, this has involved integrating environmental protection measures across the full lifecycle of project development.

At an estimated 0.4% of Canada's GDP [10], LNG Canada represents a significant national investment, but its role extends beyond economic contribution. The project has been positioned as part of a broader effort to advance lower-emission energy systems, combining infrastructure development with investments in environmental protection and community-level climate initiatives. Complementary investments in waste management [16], low-emission HaiSea Marine tugboats [14], and wildfire response [45] illustrate how environmental protection and community resilience are addressed alongside industrial development.

### Lower Emissions, Stronger Performance

From an emissions perspective, LNG Canada is designed to operate as one of the lowest-emitting large-scale LNG facilities globally. With an emissions intensity of approximately 0.14-0.15

tonnes of CO<sub>2</sub>e per tonne of LNG [17], the facility performs significantly below both global averages and leading international benchmarks [13].

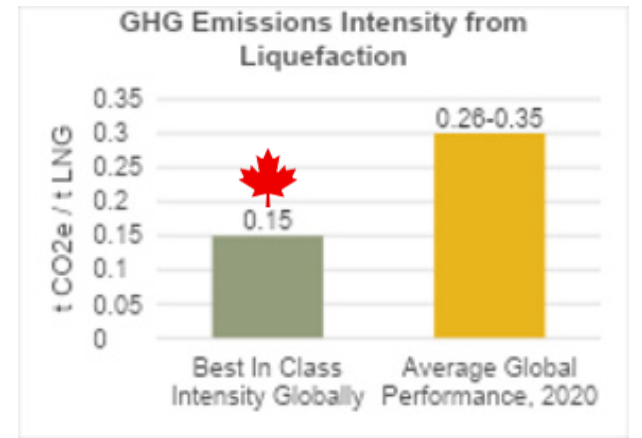


Figure 6: GHG emissions intensity from liquefaction comparison.

Upstream, Canada's natural gas sector is also characterized by relatively low methane intensity. According to international comparisons, Canada produces natural gas with methane intensity levels below global averages [18].

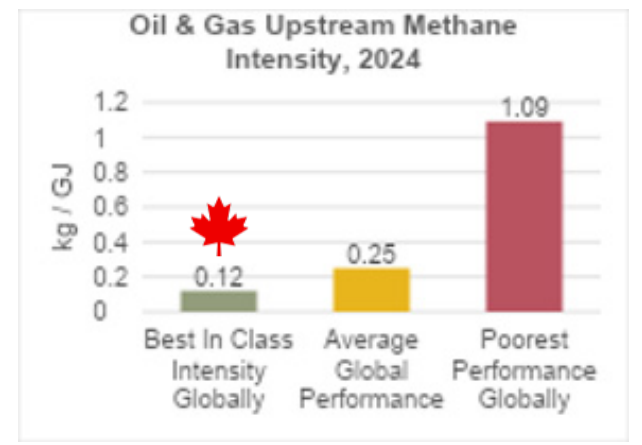


Figure 7: Oil & gas upstream methane intensity comparison.

These performance metrics are important within the context of global energy systems. LNG exports

from British Columbia are a viable alternative to higher-emitting energy sources such as coal in international markets. Estimates suggest that for every tonne of emissions generated in British Columbia, seven tonnes of emissions may be avoided in importing jurisdictions where LNG replaces more carbon-intensive fuels [46].

Figure 6 and Figure 7 illustrate these dynamics, comparing emissions and methane intensity across jurisdictions and highlighting Canada's relative position within the global energy landscape.

### Environmental Protection in Practice

“Canada's upstream natural gas companies are innovators. They continue to invest in and pilot new technologies that enable fuel switching, carbon capture, emissions reduction, and improved water efficiency. These innovations deliver accelerated environmental performance with solutions that benefit not only the natural gas sector but many other industries. Over time, the world will increasingly recognize Canada's leadership.”

John Adams,  
President & CEO, NGIF Capital  
President & CEO, NGIF Accelerator

Beyond emissions performance, both LNG Canada and Coastal GasLink have implemented a range of environmental protection measures designed to minimize impacts on ecosystems and support long-term environmental stewardship.

LNG Canada has invested in local infrastructure that supports environmental management, including \$1.5 million toward the development of Kitimat's organics facility [24], which is expected to improve waste diversion and reduce landfill impacts. The project has also implemented a series of offset and habitat protection programs in the Kitimat region, covering fish habitat, wetlands,

raptor nesting sites, bat habitats, and marbled murrelet ecosystems [47]. These initiatives include long-term monitoring programs, such as a multi-site fish habitat program designed to track ecological outcomes over time.

**\$1.5M**

Invested in Kitimat's organics facility

Coastal GasLink has implemented extensive environmental protection measures along the pipeline route. The project constructed approximately 800 water crossings, including several trenchless crossings designed to reduce disturbance to sensitive waterways and fish habitats [11].

**800**

Water crossings constructed by CGL

In addition, more than 750 personnel were trained and certified in erosion and sediment control, representing one of the largest coordinated training efforts of its kind in British Columbia [11]. These measures were designed to reduce the risk of sedimentation and protect water quality during construction.

**+750**

Personnel certified in erosion and sediment control

Environmental management efforts have also extended to broader ecosystem protection and community resilience. During the 2023 wildfire season, Coastal GasLink supported response efforts by housing firefighting crews and assisting in the suppression of more than 50 lightning-caused fires [45]. These activities reflect the role that project infrastructure and logistics can play in supporting regional emergency response capacity.

**+50**  
2023

Wildfires suppressed with the support of CGL

In parallel, waste reduction initiatives have been implemented to limit environmental impacts associated with construction. Coastal GasLink's recycling program diverted materials from regional landfills and generated more than \$640,000 in funding for local charities and non-profit organizations [48], demonstrating how environmental initiatives can also support community outcomes.

**+\$640K**

Funding generated by CGL's recycling program

Taken together, these initiatives illustrate how environmental protection and climate performance are integrated into LNG development along the corridor. Investments in emissions reduction, habitat protection, and environmental monitoring are complemented by community-focused initiatives that support waste management, emergency response, and local infrastructure.

This approach reflects the Province's broader objective of ensuring that resource development contributes to both environmental sustainability and community resilience. While LNG development operates within a global energy system where outcomes are influenced by multiple factors, the actions taken by LNG Canada and Coastal GasLink demonstrate how project-level decisions can align with provincial emission reduction goals while supporting local environmental priorities.

## 5. BENEFITS TO COMMUNITIES

### From Corridors to Clinics, Contracts to Classrooms

Major energy projects along British Columbia's LNG corridor have become more than drivers of economic activity; they have also contributed to community well-being through targeted investments, partnerships, and revenue sharing. Alongside employment and business opportunities, projects such as LNGC and CGL have supported initiatives that directly impact daily life in corridor communities, including housing, healthcare, education, and social services.

This approach reflects a broader objective within the Province's LNG framework: ensuring that the benefits of development are not limited to economic outputs, but are experienced locally through improved services, infrastructure, and quality of life. Through a combination of project-led investments and community partnerships, resources generated by LNG development have been directed to reflect local priorities.

### Reinvestment that Strengthens Local Services

A distinguishing feature of LNG development in British Columbia is the emphasis on local reinvestment. Contributions to housing, healthcare, education, and community services demonstrate how project-related benefits can extend beyond construction and operations into long-term community outcomes.

In housing, LNG Canada reported that approximately \$3.57 million was invested through programs such as home renovation support and home purchasing incentives [24], helping to improve housing availability and affordability in the region.

**\$3.57M**

Contributed by LNGC to support home renovations and purchasing

In healthcare, LNG Canada contributed \$1.25 million toward a new CT scanner at Kitimat General

Hospital, as part of a broader \$4.7 million community-led fundraising effort supported by the Max Lange Foundation, the First West Foundation, the District of Kitimat, and local residents [14] [49].

**\$1.25M**

Contributed by LNGC to buy a new CT scanner

Additional contributions have supported long-term care infrastructure, including \$750,000 toward the Kitimat Dementia Home Project, helping expand services for aging populations [14].

**\$750K**

Contributed by LNGC towards the Kitimat Dementia Care Project

Community investments have also extended to social services and childcare. LNG Canada contributed \$350,000 to the Coast Mountain Children's Society [13], supporting the creation of additional childcare spaces in the Kitimat and Haisla area, and \$150,000 to Tamitik Status of Women [13], supporting programs addressing violence against women, youth, and children.

**\$350K**

Contributed by LNGC towards the Coast Mountain Children's Society

Infrastructure investments have supported regional connectivity and public services. LNG Canada contributed \$1.2 million toward a high-capacity snowblower for the Northwest Regional Airport Terrace-Kitimat [14], as well as \$500,000 toward a new highway rescue truck for the City of Terrace [14], supporting transportation reliability and safety in northern conditions.

**\$1.2M**

Contributed by LNGC towards the Northwest Regional Airport

CGL and its contractors have also contributed to community infrastructure and services. A \$100,000 legacy donation supported the construction of a new public library in Chetwynd [50], while fundraising efforts in the fall of 2021 generated \$97,000 for United Way of Northern British Columbia [51]. Cultural initiatives have also been supported, including sponsorship of the Skin Tye First Nation Culture Camp [51], reinforcing the importance of community identity and cultural continuity.

<b>\$100K</b>	Legacy donation for the new public library in Chetwynd
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Together, these investments illustrate how project-related funding has been directed toward a wide range of locally identified priorities, supporting both physical infrastructure and social well-being across corridor communities.

### Progress in Corridor Communities

Alongside these investments, several indicators provide context for how communities along the LNG corridor have evolved during the project period. While many factors contribute to community outcomes, changes in income, education, and access to services help illustrate broader trends.

Between 2015 and 2024, after-tax household income in corridor communities increased from approximately \$78,900 to \$105,500 [19], reflecting growth in economic activity and earnings.

Household Income (after Tax)	
<b>\$78,900</b>	<b>\$105,500</b>
2015	2024

Educational outcomes also improved over this period, with school completion rates increasing from 71% to 79% [20].

School Completion Rate	
<b>71%</b>	<b>79%</b>
2015	2024

A greater proportion of students also report being taught about Indigenous Nations in school, rising from 21% to 41% [21].

Being Taught about Indigenous Nations in School	
<b>21%</b>	<b>41%</b>
2015	2024

Access to healthcare services has also evolved, with the number of registered nurses per 100,000 residents increasing from 609 in 2015 to 727 in 2023 [22], indicating expanded healthcare capacity within the region.

Registered Nurses per 100,000	
<b>609</b>	<b>727</b>
2015	2024

While these changes reflect a range of social, economic, and policy influences, they provide additional context for how communities along the LNG corridor have developed during a period of significant industrial activity and investment.

### The Power of Yes

The development of LNG Canada and Coastal GasLink represents more than the construction of major energy infrastructure; it reflects the emergence of a new model for resource development in British Columbia. Guided by the Province's LNG framework, these projects demonstrate how economic growth, environmental responsibility, Indigenous partnership, and community well-being can be advanced together through a shared set of commitments.

Across each of the five conditions, a consistent pattern emerges. Workforce investments have strengthened local skills and created pathways into long-term employment. Expanded market access has enabled the Province to capture greater value from its natural resources. Indigenous Nations have moved beyond consultation toward partnership, ownership, and leadership. Environmental measures have integrated emis-

sions performance with ecosystem protection and community resilience. And investments in housing, healthcare, education, and social services have supported tangible improvements in communities along the LNG corridor.

“B.C.’s LNG industry had a broader impact on our business community; it hasn’t been just within a single sector. For members across the region and beyond, it has meant new opportunities and growth. From local retailers to professional services, from manufacturers to transportation, CGL and LNG Canada both had multiplier effects for our economy and BC businesses.”

Alex McMillan,  
President and CEO (interim),  
Vancouver Chamber of Commerce

At the centre of this transformation is the growing role of Indigenous knowledge, governance, and leadership. Through participation in project design, environmental stewardship, and economic decision-making, Indigenous Nations have helped shape how development occurs on their territories. This has contributed to more inclusive and adaptive approaches to project delivery that better reflect local priorities, cultural values, and long-term perspectives. In doing so, these projects are not only advancing reconciliation but also establishing practices that are influencing how future resource projects are conceived and implemented across Canada.

“Being involved in the major LNG-related projects in BC has created incredible opportunities for McLeod Lake Indian Band and the Duz Cho Group of Companies. I have seen firsthand what LNG Canada, Coast Gaslink and the projects that have come since, have meant to our workers and local businesses. Our company has helped

to deliver success on these projects, creating benefits locally and for the whole country”

Jacob Albertson,  
CEO, Duz Cho Group of Companies,  
McLeod Lake Indian Band

Looking ahead, this model is shaping the next generation of LNG development. Projects such as Cedar LNG and Ksi Lisims LNG build directly on the foundation established by LNG Canada and Coastal GasLink. Cedar LNG, with majority ownership by the Haisla Nation [38], represents a significant evolution toward Indigenous-led development.

“When Canadians see their sons and daughters building these projects, they know it’s more than infrastructure—it’s opportunity. Good union jobs mean families thrive, apprentices gain skills, and the benefits ripple through communities for generations.”

Sean Strickland,  
Executive Director, Canada Building  
Trades Union (CBTU)

These projects also continue to advance the Province’s five conditions. They are expected to create new employment opportunities during operations, contribute significantly to provincial GDP, incorporate lower-emission technologies such as electrification, and deliver long-term benefits to local communities. In doing so, they demonstrate how the principles established in 2018 are being carried forward and adapted to future developments.

"We've seen people get their path back to sobriety, get their kids back, and break generational trauma chains. Their kids and their kids' kids will benefit from these opportunities—that's the true legacy"

Jordan Pechie,  
President, Seaspn Marine  
Transportation

How LNG Canada and Coastal GasLink were built may ultimately prove as significant as what

was built. Their approach has helped establish the trust, partnerships, and institutional frameworks that now enable new projects to proceed. [21] Along British Columbia's LNG corridor, this has created momentum for a model of development where benefits are shared, communities are engaged, and long-term value is prioritized.

As new projects move forward, the experience of LNG Canada and Coastal GasLink provides a reference point for how large-scale resource development can contribute not only to economic growth, but also to stronger, more resilient communities and a more inclusive energy future.

**ACTIONS COMMITTED BY CEDAR LNG AND KSI LISIMS IN ACCORDANCE WITH THE FIVE CONDITIONS OUTLINED BY THE PROVINCE**

CONDITION	CEDAR LNG COMMITMENTS	KSI LISIMS COMMITMENTS
<b>OPPORTUNITIES FOR BRITISH COLUMBIANS AND GURANTEES OF JOBS AND TRAINING</b>	<p><b>300</b> full-time construction and trades jobs and</p> <p><b>100</b> highly skilled jobs in Canada [38]</p>	<p><b>400 to 450</b> individuals employed during construction with</p> <p><b>800</b> at peak construction[52]</p>
<b>FAIR RETURN</b>	<p><b>\$85 million</b> in annual GDP contributions during the operations phase [38]</p>	<p><b>\$15.5 billion</b> expected to be contributed to the B.C. GDP over 30 years [53]</p>
<b>RESPECT AND PARTNER WITH FIRST NATIONS</b>	<p><b>50.1%</b> project ownership by Haisla Nation [38]</p>	<p>Support by <b>Nisga'a Lisims Government</b> [52]</p>
<b>PROTECT AIR, LAND, WATER – LIVING UP TO CLIMATE COMMITMENTS</b>	<p><b>Use clean hydroelectricity</b> from the BC Hydro grid to liquefy and deliver [38]</p>	<p>Emissions intensity of <b>0.02 tonnes of CO<sub>2</sub>e</b> per tonne of LNG <b>10x smaller</b> than the global average (2020) [54]</p>
<b>BENEFITS TO COMMUNITIES</b>	<p><b>\$24 Million</b> in direct annual GDP contributions to B.C. over 40 years [55]</p>	<p><b>150-250</b> permanent workers on site for a minimum of 30 years [52]</p>

Table 4: Actions committed by Cedar LNG) and Ksi Lisims in accordance with the five conditions outlined by the Province

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## APPENDIX 2A

### List of Communities of Interest

Local Government
Burns Lake, The Corporation of the Village of
Chetwynd, District of
Dawson Creek, The Corporation of the City of
Fort St. James, District of
Fort St. John, City of
Fraser Lake, Village of
Houston, District of
Hudson's Hope, District of
Kitimat, District of
Mackenzie, District of
Peace River Regional District
Port Edward, District of
Prince George, City of
Prince Rupert, City of
Regional District of Bulkley-Nechako
Regional District of Fraser-Fort George
Regional District of Kitimat-Stikine
Smithers, Town of
Taylor, District of
Telkwa, The Corporation of the Village of
Terrace, City of
Tumbler Ridge, District of
Vanderhoof, District of

Indigenous Nations
Blueberry River First Nations
Coastal First Nations Great Bear Initiatives Society
Doig River First Nations
Fort Nelson First Nation
Gitga'at First Nation
Gitxaala Nation
Haisla Nation
Halfway River First Nation
Kitselas First Nation
Kitsumkalum First Nation
Lax Kw'alaams First Nation
Lheidli-T'enneh First Nation
McLeod Lake Indian Band
Metlakatla First Nation
Nadleh Whut'en First Nation
Nak'azdli First Nation
Nee-Tahi-Buhn Nation
Prophet River First Nation
Saik'uz First Nation
Saulteau First Nations
Skin Tyee First Nation
Stellat'en First Nation
Ts'il Kaz Koh First Nation
West Moberly First Nations
Wet'suwet'en First Nation
Witset First Nation
Yekooche First Nation