

WHEN OUR NATION BUILDS

Part 3: The Power of Yes

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Energy for a
Secure Future

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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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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

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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 km² 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.

INTRODUCTION

This report (PART 3 – The Power of Yes) connects project activity to measurable dimensions of community well-being across the corridor, based on the Government of Canada's definition: "Well-being refers to the social, economic, health and political conditions essential to fulfilling enjoyable lives."

Using 2016–2021 census data, the report establishes a clear baseline and shows the starting point for social indicators in the Communities of Interest (COI) at the beginning of the project period, compared with the British Columbia average.

A baseline analysis of the COIs shows that some indicators track above or close to average provincial levels, 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. This baseline framing clarifies where the corridor was not keeping pace with provincial averages and provides the reference point for interpreting projected changes.

Building on that context, the report outlines the practical mechanisms through which Coastal GasLink and LNG Canada contribute to progress that can help narrow identified gaps over time. It highlights workforce and procurement efforts that increase local and Indigenous participation and keep more project value circulating regionally, improving household income and local enterprise growth. It also describes family and housing supports that help people live locally and participate in work and training, improving stability and retention. Education and training invest-

ments are presented as a pathway to strengthen credential attainment by reducing barriers, supporting readiness and transitions into programs, and linking training to real local jobs. Alongside this, Indigenous participation, cultural investment, and shared-value approaches strengthen community-defined well-being while also improving project delivery conditions through stronger relationships and cultural continuity. Direct community investments further support essential services and local capacity, strengthening the foundations that enable longer-term progress.

A social progress model was developed to test how these combined actions translate into projected outcomes by 2031. Key elements include:

- **A Baseline** that compares census-based social indicators (e.g. Household Income, Commuting Times, Knowledge of Indigenous Language, etc) in the COIs compared to the British Columbia average between 2016 and 2021.
- **An Economic Activity Index (EAI)** constructed for each Community of Interest using indicators such as building permits, taxation, revenues, capital outlays, and business activity.
- **The "Project Shock"** which was modeled as the difference between how indicators for the EAI communities were expected to change under normal trends with "No Project¹" Scenario, compared to how they evolve in a "Project" Scenario and "Phase II" Scenario.
- **A causal filtering framework** applied to isolate project-driven effects (e.g. "Project²" or "Phase II³" development) from background

1 **"No project" Scenario** includes all economic activity occurring within the study area except for activity attributable to LNG Canada Phase I and Coastal GasLink. As such, the No Project Scenario does not represent an absence of development, but rather a regional economy that continues to include other industrial, mining, utility, commercial, and public-sector activity

2 **"Project" Scenario** includes all economic activity occurring within the study area, including activity associated with LNG Canada Phase I and Coastal GasLink.

3 **"Phase II" Scenario** includes all economic activity occurring within the study area including activity associated with LNG Canada Phase I and the Coastal Gaslink Pipeline, as well as LNG Canada Phase II, Cedar LNG and Ksi Lisims LNG.

trends. The background trends, or “No Project” scenario includes the advancement of other major projects in the region in the same period, captured in a Major Projects Inventory, such as the Site C Clean Energy Project (Fort St. John), Rio Tinto's Kemano T2 Project (Kitimat) and the G.M. Shrum Substation Control Systems Upgrade Project (Hudson's Hope), among others.

- **A major-project exposure weighting** was then applied to each community's shock to determine how much of the modeled change was attributable to the “Project” or “Phase II” development relative to all other activity in the area (No Project). These refined project impacts were linked to census indicators (e.g. Household Income, Post-Secondary Completion Rates, Household Affordability, etc) by applying historically observed relationships between economic activity and social outcomes.
- **Correlation and Scaling Factors** were developed for the selected census indicator and are based on the statistical relationship between historical Economic Activity Index (EAI) values and observed Census outcomes. The resulting correlation and scaling factors were used to translate the project-attributable “shock” into projected changes in each census-based social indicator, in 2031, for the “No Project,” “Project” and “Phase II” scenarios.

Taken together, the baseline and project activity analysis illustrate how major projects, when paired with intentional local participation, skills and credential pathways, family supports, and community and cultural investment, can drive positive changes beyond economic development in the project corridor and help communities accelerate past their starting point in 2021.

CONTEXT ON THE CORRIDOR

The following section establishes the **starting point or baseline** for the Communities of Interest (COI) using 2016–2021 baseline census values across key indicators that address foundational attributes of community well-being. The selected indicators align with broader priorities expressed by other existing frameworks and international bodies including the Organisation for Economic Co-operation and Development (OECD), the Canadian Community Well-Being Index, the Canadian Social Progress Markers, Statistics Canada's Indigenous Peoples Survey, and the United Nations' Human Development Index which emphasize such measures of social progress as housing, education, and infrastructure⁴.

While the model is informed by these frameworks, its outputs are inherently constrained by data availability and quality: census data serves as the foundational dataset, providing broad demographic and economic coverage but limited visibility into certain critical dimensions of well-being, including health outcomes, greenspace, and childcare accessibility that are covered in other datasets, such as the Indigenous Peoples Survey, Canada's Core Public Infrastructure Survey, and the Canadian Survey on Early Learning and Child Care.

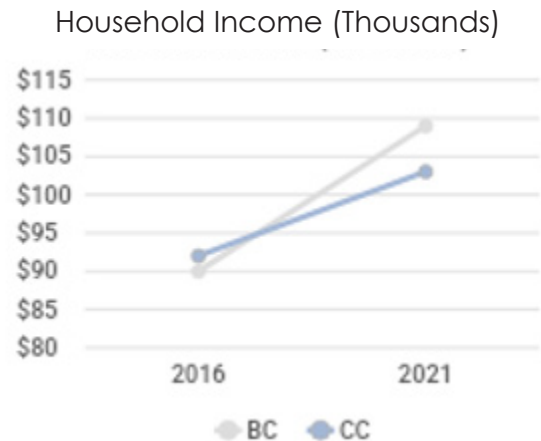
Establishing the 2016–2021 census baselines is essential, not only to describe where the corridor stood pre-project, but to anchor interpretation of the model's 2031 projections. The key question the model is meant to address is how the COI are projected to change under a "Project" scenario or a "Phase II" scenario relative to a "No Project" baseline in key indicators focused on:

- Local employment and affordability
- Infrastructure
- Education

- Cultural Vitality

In 2021, the Communities of Interest (COI) entered the Project period (e.g. engagement for and construction of LNG Canada Phase I and Coastal Gaslink) with a mixed baseline relative to the province: on several economic indicators, they tracked close to B.C. overall, while measures that reflect everyday living conditions and longer-term opportunity showed more pronounced gaps.

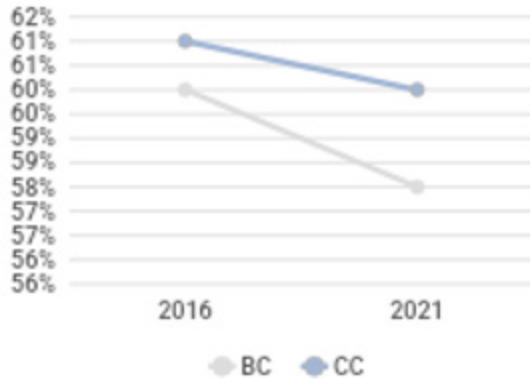
Household income growth was strong in both places over 2016–2021, but the corridor did not keep pace with the provincial rise in income. Notably, B.C. average household income increased from \$90,000 (2016) to \$109,000 (2021), while the communities of interest rose from \$92,000 (2016) to \$103,000 (2021), leaving a wider gap by 2021 despite similar starting points.



Employment rates were relatively steady in the corridor and slightly stronger than the provincial average in both years (COI: 61% in 2016 and 60% in 2021; B.C.: 60% in 2016 and 58% in 2021).

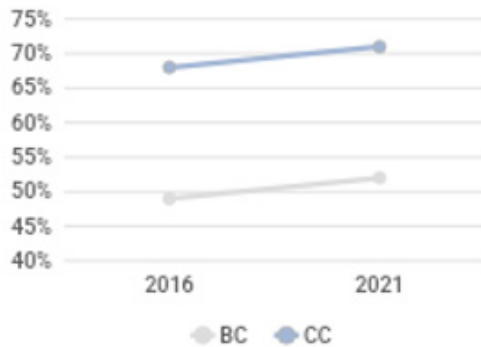
⁴ See the Appendix for a table comparing the chosen indicators against the listed frameworks.

Employment Rate



At the same time, in both 2016 and 2021, a high share of COI residents commuted within their census subdivision (CSD) in both 2016 and 2021 (68% and 71%, respectively), compared with lower provincial shares (49% and 52%), indicating opportunities located close to where people live.

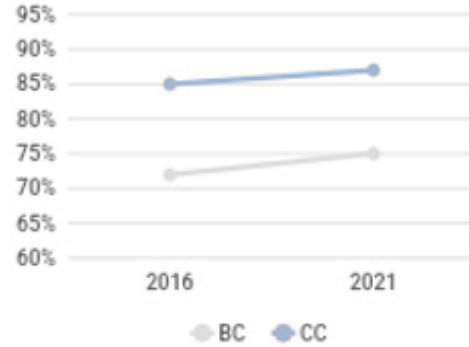
Workers Commuting within the CSD



Housing outcomes provide additional insight into living conditions across the corridor. Relatively high levels of housing affordability⁵ (defined as spending less than 30% of income on shelter, excluding housing on reserve) increased from 85% in 2016 to 87% in 2021 in the COI, compared with 72% to 75% provincially. It is notable that the Bulkley-Nechako regional district, and relevant communities such as Burns Lake Village and Houston District Municipalities, in the heart of the COI show

affordability levels between 88.2 to 97% in the 2021 census.

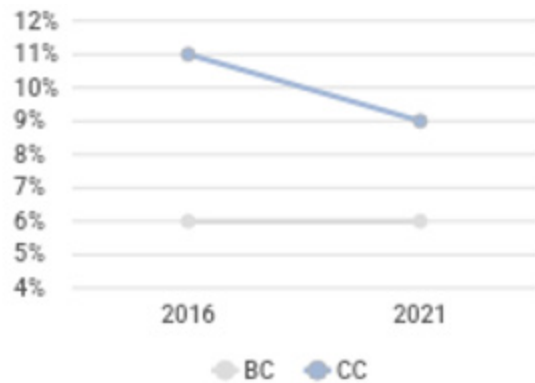
Housing Affordability



Although additional research would be required to determine impacts on housing on reserve, as shown in Figure 5 of Part 2 of When our Nation Builds, the increase in own-source revenues to First Nations of 159% resulted in increased investment in housing between 2019 and 2023, potentially driving both affordability and housing quality improvements.

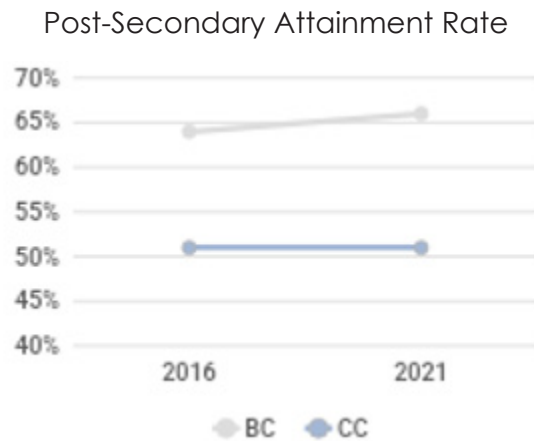
The proportion of homes needing major repairs was higher in the COI (11% in 2016 and 9% in 2021) than in B.C. overall (6% in 2016 and 2021), indicating that shelter-cost affordability can coexist with challenges in housing adequacy and quality.

Major Repairs

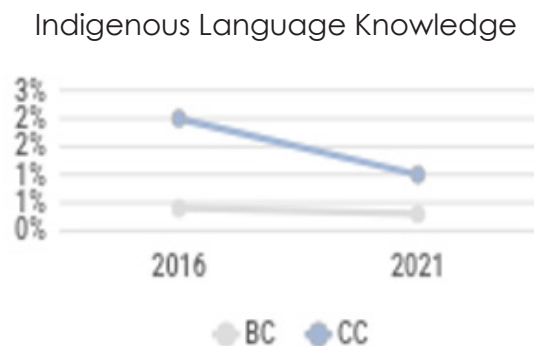


5 The Housing Affordability analysis uses Statistics Canada's Census definition of affordability, which measures whether households spend less than 30% of their total before-tax household income on shelter costs. An important interpretive lens for this indicator is that Statistics Canada uses Indicator 1465: Owner and tenant households with household total income greater than zero, in non-farm, non-reserve private dwellings. Approximately 4% of the of the Communities of Interest population (7,300 out of 180,000 people) lives on a First Nations Reserve but data was not available to assess on-reserve effects. Anecdotal improvements were reported by key informants interviewed for this project.

In terms of human capital indicators between 2016 and 2021, the COI's post-secondary attainment rate (age 25+) showed a sustained and significant gap: while B.C. improved from 64% (2016) to 66% (2021), the COI remained flat at 51% in both 2016 and 2021, underscoring a persistent difference in credential attainment that shapes long-term earning potential, mobility, and community capacity.



Finally, in terms of cultural indicators, baseline levels of Indigenous language knowledge declined in the COI, despite the central importance of language to many communities in the corridor. In 2016, the share of residents reporting knowledge of an Indigenous language in the COI was 2.0%, compared with 0.4% provincially; by 2021, this declined to 1.0% in the COI, while the provincial share decreased to 0.3%. Although rates remained higher in the corridor, the downward trend in the baseline highlights challenges surrounding language retention and revitalization in the COIs.



PROJECT ACTIVITY

Building on the baseline context, the following section details the actions taken by Coastal GasLink (CGL) and LNG Canada (LNGC) over the full lifecycle of project development and how these activities connect project activity to measurable dimensions of community well-being. While project planning and early engagement began around 2014, major construction activity commenced in approximately 2019 and began ramping down in 2023, with community investments, workforce initiatives, and engagement activities occurring throughout this period and continuing to the present. These initiatives are organized around the model's core themes (e.g., household income, housing stability and affordability, post-secondary attainment, cultural vitality, and local access to work) to illustrate how project-led practices and investments can strengthen trajectories in the COI. Collectively, these actions represent practical mechanisms for converting project activity into longer-term capability through skills, credentials, service capacity, and community re-investment.

Workforce Development

At the foundation of this trajectory is the scale of local economic participation and the deliberate effort to keep more value circulating in the region. Both projects emphasized local and Indigenous participation in employment and contracting, supported by mechanisms that expand access to work packages and build local business readiness. This includes CGL's work to maintain procurement pipelines (e.g., a database of businesses interested in participating in procurement opportunities and ongoing Indigenous-led forums such as the Contracting and Employment Task Force CETF [1]), alongside large-scale outcomes that reinforce household income and local enterprise growth:

- Over 25,700 full-time equivalent jobs created in B.C. by CGL [1][1.1][SJ1.2],

- 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],

as well as longer-term income anchors through operations (the creation of 300+ full-time, permanent jobs during operation [2]) and programs that connect residents to paid work, such as the LNG Connect Program (\$850,000 invested; over 450 regional job placements with 384 of the placements successfully placed into construction jobs across northwest B.C. [2]).

Together, these activities increase the share of project value captured locally and create pathways for residents to progress into higher-skill, higher-wage employment, an essential driver of long-term social progress.

Family Support Measures

Economic participation is then reinforced by actions that help people stay rooted in the communities where these new opportunities are created. By strengthening the conditions that allow families to live and work locally, project-related measures support a stable workforce by expanding income pathways, providing targeted housing supports, and investing in wraparound services that lower the practical cost of participating in work and training. In 2024, LNGC reported \$3.57 million spent in the region through a home renovation program and home purchasing bonus (with many renovations improving basic habitability such as bathrooms, kitchens, flooring, and appliances). The incentive is expected to continue through to 2027 and expand to include employees choosing to live in Terrace [3].

Both projects have also invested in childcare and related social infrastructure as a practical lever to support workforce participation and the capacity of local services during periods of peak project activity. \$350,000 was provided to Coast

Mountain Children's Society to support the creation of 14 childcare spaces in the Kitimat/Haisla area [4], and LNG Canada implemented social impact management measures that supported Kitimat childcare facilities in adding 30 additional childcare spaces, alongside targeted supports to Kitimat schools [5].

Together, these measures help stabilize families' ability to live and work locally, reduce household cost pressures, mitigate strain on local systems, and support workforce retention.

Education and Training

The LNGC and CGL project activity is also anchored in a continuum: investing in youth means investing in tomorrow. The project activities not only built a local workforce pipeline but also reduced the barriers that keep learners from accessing and completing education in the COI.

Between 2014 and 2024, CGL funded 750 scholarships and bursaries through Northern B.C. post-secondary institutions, with 354 awarded to students identifying as Indigenous [6]. These supports are reinforced through partnerships and transition supports, including a multi-year agreement with the College of New Caledonia that provides 10 bursaries per year for a three-year period for students in financial need or requiring academic upgrading before beginning full-time study [6].

CGL also invested over \$1.57 million through post-secondary partnership agreements and almost \$1.71 million in skills training and pre-employment programs delivered by Indigenous, non-profit, and for-profit training organizations in Northern B.C. [6]. LNGC invested over \$10 million in workforce development programs designed to increase participation of local residents, Indigenous communities, and British Columbians in trades and construction-related activities, including:

- 1,700+ apprentice applications supported by \$2.3 million+ in funding through the Trades Training Fund,
- \$1.5 million+ in the Power Engineering program to contribute to the supply of the power engineering skill pool in northwestern B.C [2].

Youth programs further strengthened longer-term participation in education and skills development. LNGC's Arx & Sparx Youth Welding Camps have invested over \$300,000 to engage 250 youth aged 11–16, combining welding skills exposure with Indigenous learning [2]. Additional youth camps were delivered across Kitimat, Terrace, and Prince Rupert [3] [5].

Collectively, these investments lower the cost of participation, support readiness and transition into study, and connect training to real local jobs to help ensure education pathways are not only available, but accessible and more likely to translate into sustained employment and higher post-secondary attainment over time.

Cultural Investment

This trajectory is further strengthened by Indigenous inclusion and shared value creation, which makes both the projects and the communities better. Development is more durable and more beneficial when Indigenous Nations are engaged as rights-holders, partners, and equity participants. Cultural investment is a key part of this shared value: it strengthens community well-being while also improving how large, complex projects are delivered.

LNGC's \$300,000 contribution to Indspire's Building Brighter Futures bursaries and scholarships supports Indigenous learners in accessing post-secondary education pathways [2]. Over time, that investment helps grow a deeper local talent pool, strengthens household stability, and supports community leadership and service delivery. This positions communities to be healthier and more resilient and improves project success

by increasing local participation and reducing reliance on fly-in labour.

CGL's support for local Indigenous community culture camps [7] reinforces these same outcomes by helping sustain cultural continuity, intergenerational learning, and community connection alongside economic development, strengthening the social foundations that enable long-term progress. CGL's implementation of the Community Workforce Accommodation Advisor and Construction Monitoring and Community Liaison advisor programs engaged 79 advisors representing 20 Indigenous Nations [8], promoting cultural exchange and traditional knowledge sharing within the workforce to support positive engagement and create safer, more respectful environments.

In this way, cultural investments translate into practical outcomes: stronger community-defined prosperity alongside more effective, stable project delivery.

Community Benefits

Direct community investments provide another layer of immediate, tangible support that strengthens well-being across the corridor, particularly in areas like health, family stability, and essential services that underpin broader progress. Examples include LNGC's \$750,000 in support for the Dementia Home Project in Kitimat and a contribution of \$1.25 million to the Kitimat General Hospital Foundation to purchase a CT scanner [2]. Beyond these direct benefits, project activity can also improve community capacity through the system-level effects of a stronger local economy: local tax revenues (such as CGL's reported \$26 million per year in property tax benefits during operations [1]) help fund public infrastructure and services that enable progress across housing, education, health, transportation, and emergency response.

At the same time, local hiring and regional workforce pipelines increase the share of employ-

ment income earned by people where they live, building local wealth that supports more resilient households, stronger local businesses, and a broader tax base. This creates additional capacity for communities to reinvest in the services and infrastructure that make long-term progress possible.

THE PROVINCE BC IS BECOMING

This section presents outcomes of the Social Progress Model for key census-based social indicators in the COIs. The indicators were chosen because they align with widely used well-being frameworks that extend beyond GDP (including dimensions such as housing, education, infrastructure, and economic security), are consistently measured in the Statistics Canada census, and reflect areas where the COI have historically had gaps compared to B.C. as a whole as described in the baseline analysis above. Moreover, selected indicators are also ones for which project activity can plausibly shift trajectories (e.g., income and employment pathways, housing stability, educational attainment, cultural vitality, and access to local work as reflected in commuting patterns).

As described in the introduction, this report models three scenarios to illustrate how social indicators might evolve. The first scenario estimates changes in social indicators in a “No Project” counterfactual future in which LNG Canada Phase I, Coastal Gaslink and related projects (Cedar LNG, LNG Canada Phase II and Ksi Lisims LNG) do not occur. This “No Project” scenario is compared to the two others:

- A “Project” scenario reflecting projected impact on social progress outcomes by 2031 resulting from investment and activity between 2019 and 2024 associated with LNG Canada Phase I and Coastal Gaslink; and
- A “Phase II” scenario showing the combined projected impacts of the “Project” scenario plus Phase II projects (Cedar LNG, Ksi Lisims LNG, and LNG Canada 2).

Together, these three scenarios provide a structured way to interpret the projections: not as a single forecast, but as a comparison of alternative trajectories that helps to clarify where positive impacts are expected to occur.

By 2031, the model suggests that “Project” and potential “Phase II” activity will place the COI on an improved trajectory across key dimensions of social progress.

Household Income

For household income, the activity associated with LNG Canada Phase I and Coastal Gaslink (i.e. Project Scenario) are projected to lift average household income from \$103,000 per year in 2021 to \$152,000 per year in 2031, compared with \$133,000 in a future where the projects did not proceed (No Project). This represents an incremental \$19,000 gain, roughly equivalent to 1.5 years of groceries.

\$26K INCREASE IN HOUSEHOLD INCOME		
is projected to occur in 2031 compared to in CGL and LNGC + Cedar LNG, Ksi Lisims LNG and LNG Canada 2 had not happened. This household lift is enough to buy over 2 full years worth of groceries.		
Average Household Income		
2031 Projection		
\$133K	\$152K	\$159K
No Project	Project	Project (incl. Phase II)
2021 Actual		
British Columbia		
\$109K		
Corridor Communities		
\$103K		

Looking ahead, to “Phase II”, the model suggests an even stronger 2031 trajectory if these projects (Cedar LNG, Ksi Lisims LNG, and LNG Canada 2) proceed alongside the “Project” activity. With these additional projects, average household income in 2031 is projected be \$159,000 per year compared to \$133,000 in the “No Project” scenario. This \$26K increase is roughly equivalent to over two full years of groceries.

Housing Affordability

On housing affordability, defined above as spending less than 30% of income on housing (on-reserve and on-farm housing excluded), 98% of included households in the COI are projected to reach affordability in the “Project” scenario by 2031 compared to 92% without them (up from 87% in 2021), translating into approximately 4,800 additional households achieving affordability compared with the “No Project” scenario.

An increase to 99% housing affordability for included households in the COI is expected where the “Phase II” scenario proceeds, translating into housing affordability for 5,550 more households in 2031 compared to the “No Project” scenario.

5,550 MORE HOUSEHOLDS		
are projected to achieve housing affordability in 2031, defined as spending less than 30% of income on housing, compared to the number that would do so without the project.		
Housing Affordability		
2031 Projection		
92%	98%	99%
No Project	Project	Project (incl. Phase II)
2021 Actual		
British Columbia		
75%		
Corridor Communities		
87%		

The modelled affordability results in the 90s are high; however, both Canadian Census observations and evidence from comparable resource-development regions suggest that such outcomes are plausible under conditions of strong income growth.

Evidence from comparable large-scale energy and resource developments in the United States also suggests that major projects can improve housing affordability through increased household incomes and employment opportunities. Examples reviewed include Cameron LNG in Louisiana, Corpus Christi LNG in Texas, and oil and gas

developments in North Dakota, where the share of households meeting affordability thresholds increased by approximately 3 to 6 percentage points during or following major development periods.

See **Appendix 3B** for additional resource community examples.

Post-Secondary Attainment

Post-secondary attainment (age 25+), is projected to rise from 51% (2021) to 56% (2031) with the “Project” scenario, compared with 52% in the “No Project” scenario. These results are equivalent to about 3,800 more people having a trade, vocational, or university credential in 2031. “Phase II” would result in post-secondary attainment reaching 59% in 2031, equating to roughly 6,630 more people having attained post-secondary credentials in 2031, further reinforcing the long-term social progress pathway.

6,630 MORE STUDENTS		
are projected to have achieved a trade, vocational or university diploma in 2031 compared to if the Project and Phase II Projects did not proceed		
Post Secondary Attainment		
2031 Projection		
52%	56%	59%
No Project	Project	Project (incl. Phase II)
2021 Actual		
British Columbia		
66%		
Corridor Communities		
51%		

Indigenous Language Knowledge

The preservation and recovery of culture is an important value for many in the COI and therefore Knowledge of Indigenous Language, a measure also tracked in the census, was selected as an important metric.

The model projects an increase in Indigenous language knowledge in the COI from 1.0% (2021) to 1.5% (2031) with the “Project” scenario and “Phase II Scenario,” compared with 1.4% without these projects but with other regional economic activity. This 0.1% difference represents around 215 additional individuals gaining knowledge of at least one Indigenous language by 2031.

215+ LEARNERS OF INDIGENOUS LANGUAGE		
are projected to gain knowledge of at least one Indigenous language in 2031 - representing the 0.1% difference between the Project and Phase II Projects moving forward or not		
Indigenous Language Knowledge		
2031 Projection		
1.4%	1.5%	1.5%
No Project	Project	Project (incl. Phase II)
2021 Actual		
British Columbia		
0.34%		
Corridor Communities		
1.0%		

Local Commuting

Lack of opportunities can often drive individuals, families, and small businesses to other places where they earn a livelihood. The presence of major projects near the COIs is significant in that it can reverse the trend of movement out of communities. Changes in local commuting was selected as an indicator of people's ability to work near to where they live.

The analysis shows the share of residents commuting within their census subdivision is projected to be 72% with the “Project” scenario and 73% in the “Phase II” scenario compared with 69% in the “No Project” scenario (relative to 71% in 2021). The difference implies 44 minutes saved per person per day for those who would otherwise commute outside their subdivision (*based on 250 working days).

44 MINS SAVED PER PERSON PER DAY NOT COMMUTING		
is projected in 2031 for residents who would otherwise commute outside their subdivision - compared to a future where CGL and LNGC do not proceed*		
Housing Affordability		
2031 Projection		
69%	72%	73%
No Project	Project	Project (incl. Phase II)
2021 Actual		
British Columbia		
52%		
Corridor Communities		
71%		

CONCLUSIONS: WHEN OUR NATION BUILDS

Taken together, the model and supporting evidence show how major project development can translate into social progress when economic activity is intentionally connected to local benefit. The corridor begins with a mixed baseline: a relatively strong employment picture, but slower income growth than the province overall, persistent housing adequacy pressures, and a sustained gap in post-secondary attainment.

Against that backdrop, the indicator improvements in the “Project” scenario are driven not only by construction spending, but also by a reinforcing set of actions: local and Indigenous contracting that keeps value in the region; workforce and education investments that reduce barriers and build credentials; housing- and family-support measures that help people live and work local-

ly; direct community investments that strengthen health and essential services; and Indigenous inclusion, cultural investment, and shared value mechanisms that improve both project delivery and community-defined well-being.

The projections suggest that these ingredients can help accelerate progress in key indicators by 2031⁶. They also suggest that it is worth it for companies and communities to work together to see projects through. While this analysis used a conservative ten-year timeframe (2021-2031) to model the social benefits of projects, the effects of more people with training and experience, households with higher incomes, and communities with growing cultural resources, are truly shown over longer time horizons. It is worth it for Canada to continue building our LNG future.

Indicator	2021 (COI)	2031 (No Project)	2031 (Phase I)	2031 (Phase I + 11)
Household Income	\$103K	\$133K	\$152K	\$159K
Housing Affordability	87%	92%	98%	99%
Local Commuting	71%	69%	72%	73%
Post-secondary Attainment	51%	52%	56%	59%
Indigenous Language Knowledge	1.0%	1.4%	1.5%	1.5%

⁶ The results of the model do not suggest uniform improvement across all dimensions of social progress. The results underscore that project activity can accelerate progress in some indicators (e.g. household income) while other indicators of progress may remain largely unchanged or face more challenging trajectories, reinforcing the need to interpret these projections as directional and comparative, rather than as a guarantee of across-the-board improvement.

REFERENCES

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- 2 LNG Canada, Provided Directly, 2025.
- 3 LNG Canada, "Community Level Infrastructure and Services Management Plan 2024 Annual Report," 2025.
- 4 LNG Canada and Coastal GasLink, "Project and Five Conditions," 2023.
- 5 LNG Canada, "Community Level Infrastructure and Services Management Plan 2023 Annual Report," 2024.
- 6 Coastal GasLink, "SEEMP Status Report No. 12," 2024.
- 7 Coastal GasLink, "SEEMP Status Report No. 9," 2023.
- 8 TC Energy, "Report on Sustainability," 2025.

APPENDIX 3A

List of Communities of Interest

Local Government	Indigenous Nations
Burns Lake, The Corporation of the Village of	Blueberry River First Nations
Chetwynd, District of	Coastal First Nations Great Bear Initiatives Society
Dawson Creek, The Corporation of the City of	Doig River First Nations
Fort St. James, District of	Fort Nelson First Nation
Fort St. John, City of	Gitga'at First Nation
Fraser Lake, Village of	Gitxaala Nation
Houston, District of	Haisla Nation
Hudson's Hope, District of	Halfway River First Nation
Kitimat, District of	Kitselas First Nation
Mackenzie, District of	Kitsumkalum First Nation
Peace River Regional District	Lax Kw'alaams First Nation
Port Edward, District of	Lheidli-T'enneh First Nation
Prince George, City of	McLeod Lake Indian Band
Prince Rupert, City of	Metlakatla First Nation
Regional District of Bulkley-Nechako	Nadleh Whut'en First Nation
Regional District of Fraser-Fort George	Nak'azdli First Nation
Regional District of Kitimat-Stikine	Nee-Tahi-Buhn Nation
Smithers, Town of	Prophet River First Nation
Taylor, District of	Saik'uz First Nation
Telkwa, The Corporation of the Village of	Saulteau First Nations
Terrace, City of	Skin Tyee First Nation
Tumbler Ridge, District of	Stellat'en First Nation
Vanderhoof, District of	Ts'il Kaz Koh First Nation
	West Moberly First Nations
	Wet'suwet'en First Nation
	Witset First Nation
	Yekooche First Nation

APPENDIX 3B

Social Progress Framework Development

The social progress framework developed for this analysis is grounded in established national and international approaches to measuring well-being. It draws on a combination of recognized frameworks and indicator systems, including:

- The Organisation for Economic Co-operation and Development (OECD) well-being frameworks (e.g., Better Life Index and How's Life?)
- The Canadian Community Well-Being (CWB) Index
- The Government of Canada's Quality of Life Framework (QLF)
- Statistics Canada's Indigenous Peoples Survey (IPS)
- The United Nations Human Development Index (HDI)
- The Social Progress Imperative's Social Progress Index (SPI)

In addition to these formal frameworks, the development of this indicator set was informed by Canadian government "quality of life" indicator reporting (e.g. 'Selected Indicators of quality of life in Canada' dashboard). Together, these sources represent widely used approaches to assessing social progress across economic and social dimensions. While they differ in structure and scope, they demonstrate strong alignment in the core domains used to evaluate well-being, including:

- **Education:** educational attainment, post-secondary participation, literacy, and access to quality education
- **Housing:** housing adequacy, affordability, homeownership, and access to basic services

- **Jobs and Income:** employment, income levels, financial security, and ability to meet basic needs
- **Health:** life expectancy, physical and mental health, and access to healthcare services
- **Civic Engagement and Governance:** participation in democratic processes, rights, and institutional trust
- **Safety and Security:** exposure to crime and violence, and perceptions of safety
- **Environmental Quality:** pollution exposure and access to nature, access to safe drinking water, sanitation services, and green spaces
- **Social Inclusion and Sense of Belonging:** social support, inclusion, and experiences of discrimination
- **Food Security:** access to sufficient, safe, and culturally appropriate food

While the above frameworks informed the overall structure and conceptual foundation of the analysis, the specific indicators included in this study were selected based on data availability and contextual relevance. In practice, this meant prioritizing indicators for which reliable and comparable data were available at the appropriate geographic scale, while ensuring alignment with the broader intent and underlying concepts reflected in the source frameworks. Indicators chosen for projection were particularly dependent on the availability of consistent, high-quality data. The table below provides a detailed overview of the indicators included in this analysis, along with their corresponding references to the considered frameworks.

Where possible, indicators have been directly aligned with those used in established frameworks; however, in some cases, matches were not

feasible due to data availability or differences in how concepts are operationalized (e.g. public transportation can fall under broader categories such as public services or community infrastructure). Additionally, certain indicators included in this study may not appear as exact equivalents within the referenced frameworks. For example, while some frameworks track the population with a university degree to measure post-secondary participation, this analysis uses post-secondary completion to better capture a broader range of educational pathways, including trade certificates and diplomas, which are particularly rel-

evant to the project context. Although not an exact match, these indicators reflect the same underlying dimension of social progress and are therefore considered aligned in intent.

While local commuting patterns are not included explicitly in any of the chosen frameworks, they were incorporated to capture the dimension of access to local employment opportunities. Its inclusion reflects an effort to ensure that the analysis captures outcomes that are meaningful in relation to project-specific socio-economic dynamics.

Indicator	OECD	CWB	QLF	IPS	UN HDI	SPI
Household Income	X	X ⁷	X			
Housing Affordability	X					
Employment Rate	X	X	X			
Local Commuting						
Share of Commuting						
Major Repairs Needed		X ⁸		X		
Post-secondary Attainment		X ⁹	X	X		
Indigenous Language Knowledge			X ¹⁰	X		

7 Total income per capita

8 Proportion of community residents living in homes that do not require major repairs

9 Population with a university degree

10 Indigenous language retention

APPENDIX 3C

Housing Affordability Example Outcomes in Resource Communities

Region	Project / Development	Timeframe	Affordability	pp Change in Affordability
Calcasieu Parish / Lake Charles, LA	Cameron LNG states a 5-year construction project, with Train 1 commercial operations in Aug. 2019 , Train 2 in Mar. 2020 , and Train 3 in Aug. 2020 . (Cameron LNG)	~2014-2020	FRED/U.S. Census ACS: burdened households fell from 26.69% in 2011 to 23.22% in 2021 . (FRED)	+ 3.47 pp
McKenzie County, ND	Minneapolis Fed identifies the Bakken oil boom as a major oil-patch development; housing supply growth and rapid income growth helped moderate shelter-cost pressure near oil fields. (Federal Reserve Bank of Minneapolis)	2010s oil boom, post-boom adjustment	FRED/U.S. Census ACS: burdened households fell from 23.48% in 2022 to 18.52% in 2024 . (FRED)	+ 4.96 pp
Mountrail County, ND	Minneapolis Fed identifies the Bakken oil boom of the 2010s as a major oil-production expansion affecting North Dakota oil-patch counties. (Federal Reserve Bank of Minneapolis)	2010s oil boom	FRED/U.S. Census ACS: burdened households fell from 15.58% in 2016 to 12.10% in 2021 . (FRED)	+ 3.48 pp
Nueces County / Corpus Christi, TX	HUD states Corpus Christi became one of the largest U.S. oil and natural gas export hubs; Cheniere identifies Corpus Christi LNG as the first greenfield LNG export facility in the contiguous U.S. (HUD User)	2010s energy export build-out; LNG production began 2018	FRED/U.S. Census ACS: burdened households fell from 37.20% in 2010 to 31.52% in 2017 . (FRED)	+ 5.68 pp