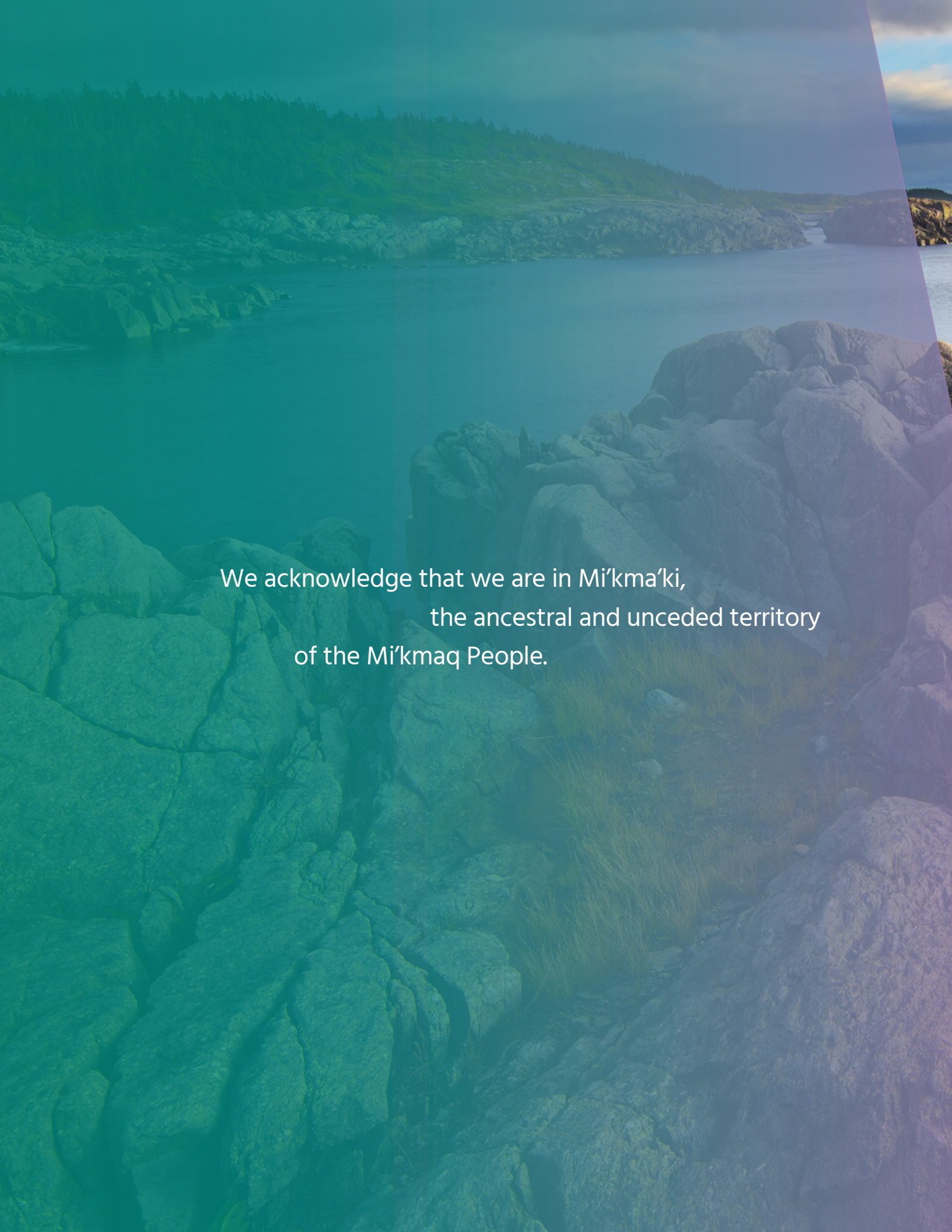




Forward. Together.

Unama'ki - Cape Breton
Economic Development & Population Growth Plan

MARCH 2024



We acknowledge that we are in Mi'kma'ki,
the ancestral and unceded territory
of the Mi'kmaq People.



Acknowledgements



Land Acknowledgement

The Project Team, consulting team, the many collaborators who contributed to this work and the board, staff and investors of the Cape Breton Partnership respectfully acknowledge that we live and work in Unama'ki, a part of Mi'kma'ki, the unceded and traditional territory of the Mi'kmaq people who have upheld their commitments to the Treaties of Peace and Friendship since 1725.



Funding and Collaboration Acknowledgement

Forward. Together. was made possible through the financial support of the Government of Nova Scotia through the Department of Economic Development (DED), the First Nation communities and municipalities of Unama'ki - Cape Breton through the Cape Breton Regional Enterprise Network and the CBRM Regional Enterprise Network, and the over 150 investors of the Cape Breton Partnership.



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Cape Breton Partnership

Since 2019, the staff of the Cape Breton Partnership has led the community engagement, research, and development of **Forward. Together.** and the previous strategy that came before. Now, as this plan is finalized and rolled out, the Cape Breton Partnership will continue to take a leadership role in the assessment and future evolution of **Forward. Together.**

The responsibility of the execution of this plan's goals and objectives, while adhering to its guiding principles, will belong to Unama'ki - Cape Breton's Island-wide Growth Network: the organizations, institutions, businesses, communities, and leaders who are committed to the growth of our Island. While the Cape Breton Partnership will lead a number of important tasks from this plan, its role in execution will largely be as a member of the wider Growth Network (see figure 1).

Cape Breton Partnership Board of Directors

The Cape Breton Partnership Boards of Directors from 2019-2024 provided regular support, advice, feedback and insight into the development of this plan. This plan has benefited from the input, guidance, and experiences of some of our Island's most committed private-sector leaders during this time.

Cape Breton Partnership Investors

The over 150 investors of the Cape Breton Partnership, comprised primarily of private-sector companies and also including First Nations, municipalities, and federal and provincial agencies, provided essential support to **Forward. Together.** A full list of investors is available on the website: <https://capebretonpartnership.com/our-investors/>

The People of Unama'ki - Cape Breton and the Strait of Canso Region

From 2019 to 2023, people from across the Island were generous with their time, insight, and wisdom gained from personal experience. Their candor and willingness to contribute was critical to ensuring **Forward. Together.** is a plan for all of Unama'ki – Cape Breton - those who arrived and lived here long ago, those who are here now, and those whom we look forward to welcoming soon.

Wela'lioq (Thank you all).



Growth Champions



The success of **Forward. Together.**, as Unama'ki - Cape Breton's Economic Development & Population Growth Plan, depends upon a commitment for economic development partners on the Island to share a vision and work together, especially:

Indigenous Communities and Municipalities

Through the Regional Enterprise Network program, the region's Indigenous communities and municipalities play an active role in local economic development across the Island.

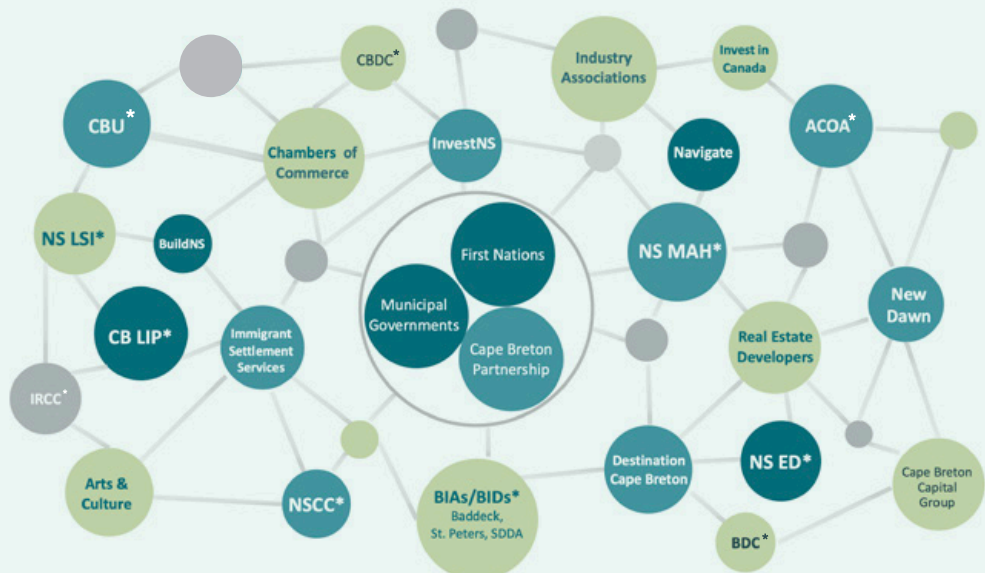
Provincial Departments and Agencies

The economic development ecosystem in Unama'ki - Cape Breton includes a variety of provincial government entities including the Department of Economic Development, Invest Nova Scotia, Build Nova Scotia, the Department of Labour, Skills and Immigration, Nova Scotia Health, L'Nu Affairs, and others. It is important for these entities to be aligned with the vision and focus of the Unama'ki - Cape Breton Economic Development & Population Growth Plan.

Federal Departments and Institutions

The federal government has a key role to play supporting economic development in Unama'ki - Cape Breton through Atlantic Canada Opportunities Agency (ACOA), Immigration, Refugees and Citizenship Canada (IRCC), Rural Economic Development, Invest in Canada and other departments and organizations.

Figure 1: Island Wide Growth Network



ACOA:
Atlantic Canada Opportunities Agency

BIA/BID:
Business Improvement Area/ Business Improvement District

CB LIP:
Cape Breton Local Immigration Partnership

NS DED:
Nova Scotia Department of Economic Development

NS LSI:
Nova Scotia Department of Labour Skills and Immigration

NS MAH:
Nova Scotia Department of Municipal Affairs and Housing

NSCC:
Nova Scotia Community College

CBDC:
Community Business Development Corporation

CBU:
Cape Breton University

IRCC:
Immigration, Refugees and Citizenship Canada

BDC:
Business Development Bank of Canada

Non-Profits and other Local Partners

There are a wide variety of industry groups, associations and other non-profit organizations that are involved in economic development including: Chambers of commerce; focussed regional business associations and groups such as BABTA (Baddeck Area Business & Tourist Association), SPEDO (St. Peter's Economic Development Organization), CEC (Conseil économique de Cheticamp), SDDA (Sydney Downtown Development Association); sector councils; industry associations; social enterprises; co-operatives; incubators such as Navigate and the MakerSpace; community economic development organizations with a strong social and/or cultural mandate such as New Dawn; and many other like-minded organizations across the Island.

Post-Secondary Education (PSE) Institutions

Unama'ki – Cape Breton's economic development relies on a strong local talent pipeline. Now more than ever the region needs fully engaged post-secondary education (PSE) institutions including Cape Breton University, NSCC Strait Area Campus, NSCC Sydney Waterfront Campus, Université Sainte-Anne and other private skill-developing agencies. Beyond their role in the talent pipeline, PSE partners are important applied research partners, knowledge providers, convenors, connectors and collaborators.

The Cape Breton Partnership

The Cape Breton Partnership is Unama'ki – Cape Breton's private sector-led economic development organization. The Cape Breton Partnership is funded and supported by both the public and private sectors and has a mandate to promote the region as a great place to live, work and invest; grow a culture that values and celebrates creativity, innovation, and entrepreneurship; and connect entrepreneurs and companies to the resources they need to succeed.

As the operator of both the CBRM Regional Enterprise Network and the Cape Breton Regional Enterprise Network, the Cape Breton Partnership will be responsible for leading and implementing many of the actions outlined in this new plan through the provision of its business support services, population growth efforts and special projects.



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Forward. Together.

Vision: Unama'ki - Cape Breton is a growing and prosperous region known for its vibrant, diverse, inclusive, united, and welcoming population.

Mission: To grow the economy, workforce and population of Unama'ki – Cape Breton.

Guiding principles:

Collaboration and community: We are all in this together.

Relationships and reconciliation: We are all Treaty people.

Energy and optimism: A better future begins with better attitudes.

Inclusion and diversity: The economy works best when it works for everyone.

People and environment: Our greatest assets work in harmony.

Innovation and creativity: Our creative spirit is the key to our success.

Strategic pillars:

| Pillars/Goals | | |
|---|---|--|
|  | 1 | People: A growing population with a focus on workforce development. |
|  | 2 | Inclusion: An economy that works for everyone. |
|  | 3 | Reconciliation: Reconciliation through economic development partnerships. |
|  | 4 | Strong communities: Capacity to support growth throughout the region. |
|  | 5 | Entrepreneurship and business growth: A culture of entrepreneurship and high-quality companies. |
|  | 6 | Innovation: A resilient, progressive economy. |

1 Introduction



Canso Causeway

This Economic Development and Population Growth Plan comes at a significant juncture for the region.... an ideal time to rethink how we value and define growth and success.

The Cape Breton Partnership led the development of an Island-wide Economic Development & Population Growth Plan for Unama'ki - Cape Breton in 2019 and early 2020. This process involved engagement with dozens of stakeholders and partners throughout the region and beyond. Because of the COVID-19 pandemic and the need to shift focus to addressing related challenges, the plan was never formally adopted and implemented.

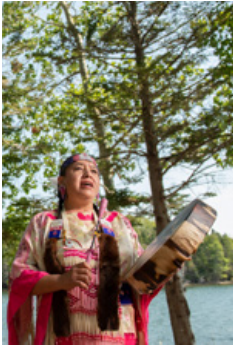
In late 2022, the Cape Breton Partnership decided to build on the foundation of the plan created in 2019-2022 and update the plan adding new insights based on changes to the population and economy coming out of the pandemic. The consulting team of Jupia Consultants Inc. and Mellor Murray Consulting completed the CBRM Economic Development Strategy in 2022. They were subsequently engaged to prepare an updated Unama'ki - Cape Breton Economic Development & Population Growth Plan.

The Cape Breton Partnership would like to thank Group ATN Consulting Inc. for its work on the original plan in 2019-2020. The Cape Breton Partnership also recognizes the significant contributions of its staff and board members to the original strategy and the updated strategy. The consulting team re-engaged with over 40 organizations, companies and government partners to acquire their insights into the new plan and, specifically, what had changed as a result of the pandemic. Further, the consulting team looked at a wide variety of research and data including the 2021 Census, 2022 business counts, new population forecasts and other reports.

This economic development and population growth plan comes at a significant juncture for the region. The COVID-19 pandemic impacted all aspects of the local economy for over two years, disrupting business patterns, consumer demand and investment opportunities. Longer-term demographic trends and shifts in the regional economy, combined with the pandemic disruption, create an ideal time to rethink how the stewards of the land, community champions, and decision makers in all communities throughout Unama'ki - Cape Breton and the Strait of Canso region value and define growth and success.

The economic development plan provides the direction for future efforts to grow the regional economy by supporting local business, attracting new investment and growing the workforce to support that vision and make significant progress by 2030.

2 Who is this plan for?



Goat Island, Eskasoni

A plan for the whole of Unama'ki – Cape Breton

This plan has been developed to assist in the collaboration and action of decision makers and partners for the success, growth, and economic development of all people in Unama'ki - Cape Breton and the Strait of Canso region.

As the successor plan of the "Prosperity Framework" launched in 2013, "**Forward. Together.**" has been crafted to assist not just the Cape Breton Partnership, but all organizations, private-sector businesses, governments, and partners that seek to build community and economic prosperity in this region.

Forward. Together. also serves as the economic development strategy for the Cape Breton Regional Enterprise Network (CB REN). As of June 2023, the CB REN is an official collaboration between First Nations of We'koqma'q, Wagmatcook, Eskasoni and Membertou, the Municipalities of the Counties of Richmond, Inverness and Victoria, the Town of Port Hawkesbury, and the Province of Nova Scotia through the Department of Economic Development.

Forward. Together. builds on the work completed in 2019/2020 entitled the Cape Breton Economic Development and Population Growth Plan. It also helped inform and align with CBRM Forward, the official economic development strategy of the CBRM Regional Enterprise Network (CBRM REN) completed in 2022 and which is a complementary strategy to **Forward. Together.**

The success of **Forward. Together.** relies on the collaboration of the many entities committed to the success of Unama'ki – Cape Breton as shown in the Island Wide Growth Network (Figure 1). Through collective committed action to regional organizations such as the Cape Breton Partnership, regional enterprise networks, shared services and planning mechanisms, and intentional regional communication such as One Unama'ki - Cape Breton events, the foundation for success will remain strong.



Petit-de-Grat

3 Setting the stage



Figure 2: Map of Unama'ki - Cape Breton and the Strait of Canso Region*

Source: Cape Breton Partnership



North Sydney

3.1 Geography

Unama'ki - Cape Breton is an island region of 10,400 square kilometres in Nova Scotia that includes five municipalities: Cape Breton Regional Municipality, Victoria, Inverness and Richmond counties, the Town of Port Hawkesbury with a total population of 132,700 (2022); and five First Nations: Eskasoni, Wagmatcook, We'koqma'q, Membertou and Potlotek. There are two medium-sized urban population centres (Sydney and Glace Bay), one town (Port Hawkesbury), and several smaller population centres (including Isle Madame, Baddeck, Cheticamp, North Sydney, St. Peter's, Ingonish, Inverness, New Waterford, Mabou, and many more).

*The Cape Breton Partnership works collaboratively with private-sector investors and community leaders and organizations representing Unama'ki - Cape Breton region, as well as the Strait of Canso (Tuiknek Samqwan), which includes portions of the traditional Mi'kma'ki districts of Piktuk and Eskikewa'kik.

The Strait Area Chamber of Commerce, ACOA, InvestNS, the Cape Breton Partnership and others collaborate to support investment in the Strait of Canso region through their programming and the maintenance of "the Strait" brand and website - www.thestrait.ca.

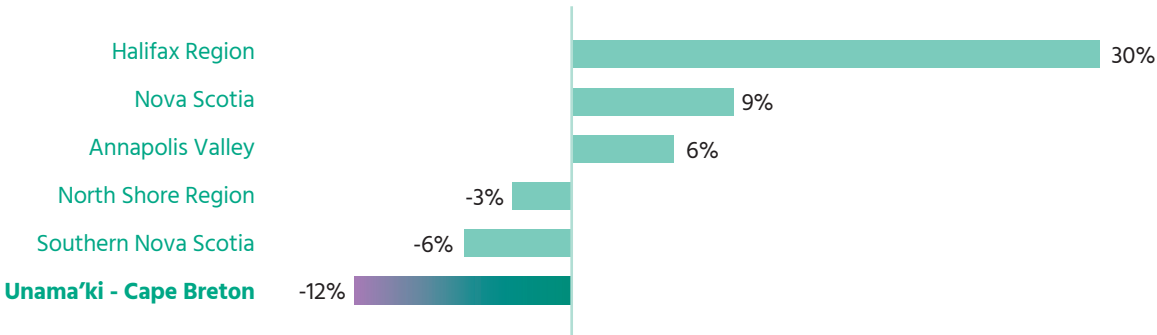


3.2 Room for optimism

It is widely acknowledged that the Unama'ki - Cape Breton economy has experienced significant economic upheaval over the last 20 to 30 years. For instance, portions of the CBRM were previously known as "Industrial Cape Breton", referencing the region's long history as an energy and manufacturing powerhouse. Now the CBRM has one of the lowest concentrations of mining and manufacturing employment among urban centres across the country.

The economic decline in Unama'ki - Cape Breton led to demographic and population changes. The population has been declining for decades, with a high volume of out-migration. It is now one of the oldest jurisdictions in Canada as measured by median age.

Figure 3: Population change by economic region in Nova Scotia, 2001-2022 (%)



Source: Statistics Canada Table 17-10-0137-01.

However, the region's demographic trajectory is shifting. Unama'ki - Cape Breton grew by 1,200 between 2021 and 2022 (Figure 4), and an estimated 2,100 more adults (15+) and over 2,100 people joined our communities between September 2022 and September 2023 (Figure 5).

The region is also on pace for another record year for immigration with 700 permanent resident admissions between January and September 2023.

Figure 4: Population change, Cape Breton economic region, by timeframe (%)*

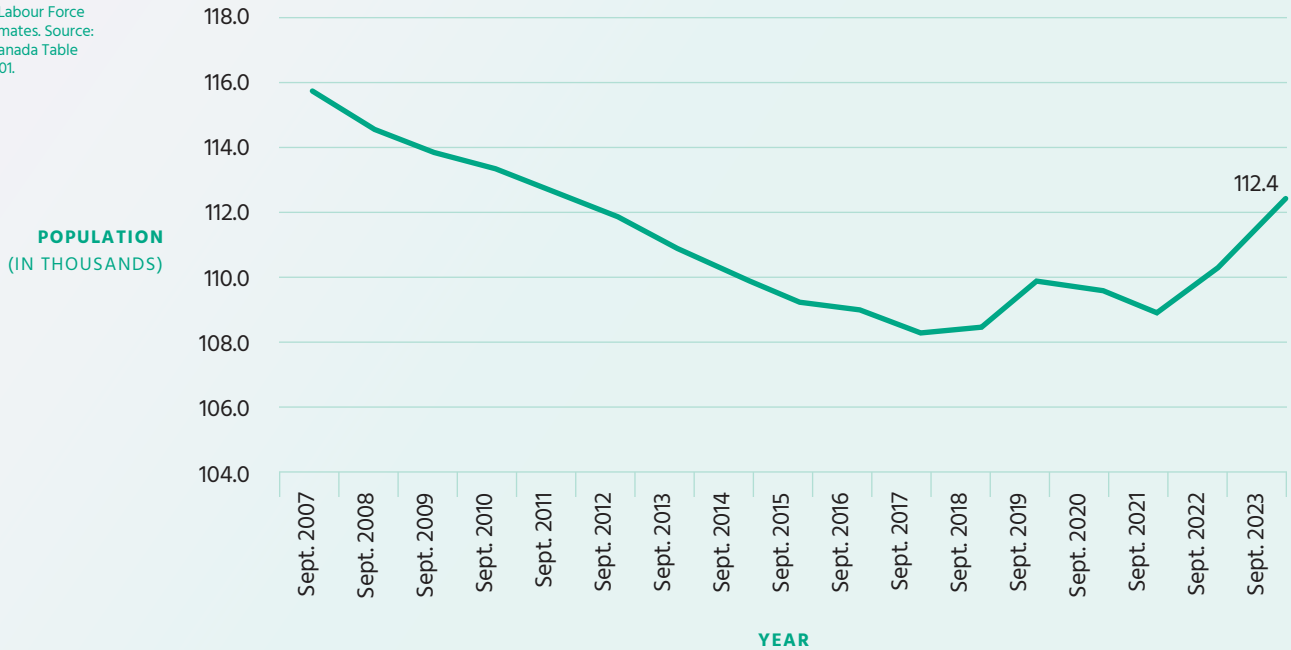


*As of July 1st each year. Source: Statistics Canada Tables 17-10-0137-01 and 17-10-0033-01.



Figure 5: Estimated population aged 15+ as of September each year (in thousands), Cape Breton Economic Region*

*Using the Labour Force Survey estimates. Source: Statistics Canada Table 14-10-0387-01.



Unama'ki - Cape Breton's demographic trajectory is shifting - 1,200 new residents chose to make the Island their home between 2021 and 2022, and over 2,100 people joined our communities between September 2022 and September 2023.



3.3 Strengths, weaknesses opportunities and threats

Forward. Together. is focussed on the future. Among the dozens of people engaged in the development of this plan, there was a broad consensus that now is the time to act. The tightening labour market is starting to impact employers, from the largest organizations to small local firms. Residents and business owners alike clearly understand the challenges and are poised to move forward.

Strengths

- Population Attraction
- First Nations Leadership
- Post-Secondary Education
- Tourism and Culture
- Affordability
- Strong Emerging and Traditional Industries
- Entrepreneurship
- Successful Collaboration
- Transportation Hub Assets

S

Weaknesses

- Declining Demographics
- Outmigration
- Rural / Remote Location
- Labour Shortages & Availability
- Negative Attitudes
- Housing and Infrastructure Challenges
- Communications & Connectivity

W

Opportunities

- Rural Opportunities
- Emerging Green Energy Sector
- Education & Research
- Provincial Population Growth
- Construction & Housing
- Growing Student Population
- Transportation Expansion

O

Threats

- Regional Competition
- Reduced Global Tourism
- Reduction in Air Service
- Limited Rail Access
- Underdeveloped Cross-industry Collaboration

T

Figure 6: SWOT Analysis Framework

During the engagement conducted to develop this strategy, some economic development partners suggested that the organizations in the economic development ecosystem would benefit from greater strategic alignment. The Cape Breton Partnership has played a unifying role in recent years and its continued leadership working with key players to align with a shared vision and direction will be important. Community feedback, along with regional industrial and demographic data, has enabled a comprehensive analysis of strengths, weaknesses, opportunities, and threats present in Unama'ki - Cape Breton.



NSCC, Port Hawkesbury

Population Attraction: The Island has a capability to attract population from across Canada and internationally.

First Nations Leadership: The Mi'kmaq communities in Unama'ki - Cape Breton have been successfully developing their local economies, establishing themselves as regional, national, and global leaders in economic and business development.

Post-Secondary Education Excellence: Unama'ki - Cape Breton boasts an excellent post-secondary education infrastructure.

Tourism and Culture: Consistently ranked one of the top islands in the world, Unama'ki - Cape Breton has a strong tourism and culture brand.

Affordability: - Unama'ki - Cape Breton has a competitive cost of living comparable to other Canadian jurisdictions.

Strong Emerging and Traditional Industries: Green Energy and Biotech industries are growing with wind and hydrogen interest and the success of the Verschuren Centre. Advanced manufacturing and innovation connecting our traditional fishing and forestry industries, and an emerging tech start-up sector, are all advancing.

Entrepreneurship: A new and growing culture of optimism and entrepreneurship is evident in Unama'ki - Cape Breton.

Successful Collaboration: Cooperation between business and communities is accelerating, resulting in even more collaboration and success in our communities.

Transportation Hub Assets: Assets include: Reliable connection to the mainland's rail line in the Strait Area; a number of reliable and capable sea ports with access to all global markets; two airports with committed operators servicing a range of air transport needs; maintained road access to the Trans-Canada Highway via four 100-series highways; and the Marine Atlantic Ferry system connecting Nova Scotia to Newfoundland and Labrador.



Marine Atlantic, North Sydney



Weaknesses:

Declining Demographics: The region is experiencing a significant demographic imbalance with considerably more of the population about to leave the workforce than the number about to join.

Outmigration: The region has a history of population out-migration.

Rural / Remote Location: Located away from what some would consider commonly travelled routes.

Labour Shortages & Availability: Connected to population decline, a growing labour shortage and related skills mismatch has risen in recent years. Systemic issues in unemployment policy and data collection are also further impacted by local seasonal employment realities.

Negative Attitudes: Legacy negative attitudes shaped by past challenges have embedded a negative perception with today's residents that outweighs the current reality.

Housing and Infrastructure Challenges: A growing housing deficit and infrastructure gap.

Communications & Connectivity: A number of gaps exist throughout the region where residents, businesses, and some communities lack reliable broadband and/or cellular signals and connections.

Opportunities:

Rural Opportunities: The region can embrace the national trend of population mobility to smaller centres and rural communities, remote work capabilities, and growth in immigration.

Emerging Green Energy Sector: The transformation of the energy sector including a migration from coal and the movement to Net Zero 2050 holds potential as Unanam'ki - Cape Breton looks to migrate from its three coal-fired electricity plants to becoming a green energy hub. This will also include new specialized job opportunities.

Education & Research: As new technical industries become established in the region, the opportunities for education and research to support those industries will ramp up quickly.

Provincial Population Growth: The provincial government target of two million residents by 2060 could provide provincial supports for all regions across Nova Scotia to renew and increase their populations.

Construction & Housing: With a noted priority on addressing housing and infrastructure challenges, Unanam'ki - Cape Breton has the physical room to grow its built environment and explore emerging new construction options, such as modular housing, new materials, and more.

Growing Student Population: With an expanding population of students (both from local communities and from abroad), sectors that rely on a part time and flexible workforce (such as retail and service businesses) will continue to see improvements to local labourforce options.

Transportation Expansion: With new industries and businesses looking to become established locally, improvements and expansion of transportation and supply chain availability will create lasting infrastructure that existing and future developments will need to move forward.



Orangedale



Glace Bay

Threats:

Regional Competition: There is heightened competition for business investment, entrepreneur attraction and people attraction across regional and national markets, and the Net Zero 2050 energy sector transformation will undoubtedly lead to winners and losers.

Reduced Global Tourism: The global tourism flow into Canada is not rebounding as fast as expected, causing concern to both current and future tourism businesses.

Reduction in Air Service: The J.A. Douglas McCurdy Airport in Sydney has not recovered key routes that connect people to and from the rest of the world.

Limited Rail Access: As of 2024, rail service into Unama'ki - Cape Breton remains inactive past the Strait Area, a consideration for industries needing rail access deeper into Unama'ki - Cape Breton in order to establish their developments locally, and the success of the broader Atlantic Canada region including industries in Newfoundland and Labrador.

Underdeveloped Cross-industry Collaboration: Lack of understanding between traditional and emerging industries threatens to negatively impact both if not regularly mitigated through communications and information sharing.



Victoria Co-op Fisheries, New Haven

Unama'ki - Cape Breton is limited by housing challenges and consistent access to cellular and broadband connectivity.



3.4 The region's big challenges

To prosper, the region will need to address the following substantial, overriding challenges:



Louisdale

Until recently, the region's population has been shrinking. This trend has been reversed, and now needs to accelerate. **Unama'ki - Cape Breton must get back to sustained population growth in the coming years.**

There are considerably more deaths than births in the region each year. There were just under 1,000 more deaths than births in 2022. This means **the region will need to attract thousands of young families in the coming years** to rebalance the demographic situation.

Some traditional industries in the region are at risk (e.g., electricity generation). To prosper, **the region will need to embrace new industries while exploring new opportunities in the traditional natural resource sectors.**

The region's workforce is aging rapidly, with 30 per cent currently over the age of 55. The region must **attract and retain thousands of working age newcomers and** build awareness that **Unama'ki - Cape Breton is becoming a land of opportunity.**

45 per cent of the region's entrepreneurs are over 55 years of age. **Unama'ki - Cape Breton will need a new generation of entrepreneurs to emerge** - thousands between now and the 2040s.

Geographically, the region remains **remote from large population centres**, and relatively difficult to access.

- The region's **limited transportation infrastructure is a strategic disadvantage** relative to many peer regions. Unama'ki - Cape Breton is one of a declining number of regions in Canada that is not either bisected by a major four-lane highway system, fully connected to a Class 1 rail operator or serviced by daily scheduled air service to multiple centres including Halifax.
- **Key telecommunications infrastructure is lagging** relative to many other jurisdictions. Many parts of Unama'ki - Cape Breton continue to lack highspeed internet or cellular service.
- The average annual number of **new housing units built across Unama'ki - Cape Breton since 2001 has dropped more than half** compared to the 1961-1990 time frame. It is likely that new housing construction will need to get back to at least the level seen in the 1970s and 1980s to accommodate new population growth.

Unama'ki - Cape Breton needs to foster a culture of optimism. After 40 years of population decline, we must believe growth is possible.

3.5 Unama'ki - Cape Breton needs new industries and entrepreneurs

Appendix A contains a report on the growth imperative for Unama'ki - Cape Breton. This document provides a compelling case for economic and population growth now across the Island. For generations, Unama'ki - Cape Breton has played an important role in the Canadian economy as a fishing centre, energy producer, recognized tourism destination and incubator of artists and cultural talent.

Unama'ki - Cape Breton has considerable natural resources, including local livestock and produce, fish, forests, and minerals. Some of these natural resources have not generated as much economic activity in recent years, and the Island has the potential for more agriculture. The farming sector has seen a steep decline in just the past 10 years. The number of operational farms on the Island dropped by 35 per cent between 2011 and 2021 (from 286 to 185). The amount of farmland declined by 35 per cent over the same period. As of 2021, less than one half of one per cent of the Island's land area was used for farmland. Natural resources development must be part of Unama'ki - Cape Breton's collaborative efforts in the years ahead, not only for economic opportunity and export development, but also to increase food security and local independence in light of climate change and global supply chain unrest.

Unama'ki - Cape Breton has considerable natural resources, from fish to forests and minerals. These natural resources have not generated as much economic activity in recent years, and the Island has the potential for more agriculture. The farming sector has seen a steep decline in just the past 10 years. The number of operational farms on the Island dropped by 35 per cent between 2011 and 2021 (from 286 to 185). The amount of farmland declined by 35 per cent over the same period. As of 2021, less than one half of one per cent of the Island's land area was used for farmland. Natural resources development must be part of the Unama'ki - Cape Breton in the years ahead.

Employment data from the annual Statistics Canada Labour Force Survey documents the changing economy. Unama'ki - Cape Breton had a larger manufacturing sector in 2006. Three of the six main industry groups that added employment between 2006 and 2022 were public sector (health care, public administration and utilities). Census data showed that the private sector in Unama'ki - Cape Breton shed 17 per cent of total employment over the 15-year period while the public sector employment increased by 10 per cent.

As it looks to the future, Unama'ki - Cape Breton will need to build on these strengths and leverage new opportunities. Cape Breton University, the two Nova Scotia Community College campuses, Université Sainte-Anne's two locations and private-sector skill development companies such as METI (Maritime Environmental Training Institute) and CBBC Career College play an important role in developing the talent pipeline and are catalysts for research, entrepreneurship and new industry development. The ocean is emerging as a driver of both traditional industries and new industrial activity. New tech-based industries are also expanding as entrepreneurs and local institutions work together to build a strong environment for start-up companies. The five First Nations communities in the region are engines of economic and business development. Commercial industrial development in areas such as Point Tupper (industrial park), Little Narrows (gypsum) and Sydport (industrial park) are attracting new investment activity in traditional and emerging sectors; major tourism developments in Ingonish and Inverness are accelerating; and communities in both the Strait Area and the CBRM are strengthening their roles as urban hubs for the entire Island.



Baddeck Waterfront

3.6 Population growth will be key

There will be no economic resurgence across Unama'ki–Cape Breton without significant population growth. Appendix A contains three different population growth scenarios for the region between 2022 and 2042 and the impact on the size of the workforce. The region's future prosperity and success depends on growing the workforce.

The aspirational population growth target in **Forward. Together.** is based on the need to grow the workforce. The Growth Imperative Report in Appendix A outlines three population growth scenarios of which only an annual population growth target of 1.3 per cent will result in the workforce needed to grow the regional economy.

Table 1: Population Growth Target

| Population Growth Target: | Projected outcome: | Implications: |
|--|---|---|
| Population growth enough to boost the workforce by 0.5 per cent per year | <p>The population needs to grow to 173,000 by 2042 (+30 per cent or an average of 1.3 per cent per year).</p> <p>The workforce grows to 74,200 (an average of 0.5 per cent per year).</p> | <p>This modest increase in the size of the workforce will support export-focussed industries and should allow for new industries to develop.</p> <p>The region will need to attract at least over 2,000 (net) more people on average per year to achieve this population growth (annual average of 1.3 per cent).</p> |

3.7 The provincial case for a prosperous Unama'ki–Cape Breton

A thriving and prosperous Unama'ki - Cape Breton also contributes to a strong Nova Scotia and a strong Canada. The key arguments for investing in Unama'ki - Cape Breton's economic development future are summarized below.

#1: Multiple Growth Centres

Nova Scotia needs more than one growth centre if the province is to reach a population of two million by 2060. Much of the increase will occur in the Halifax Region but to restrict growth to one area would be short sighted, as CBRM is the second largest urban centre in the province.



#2: Growing Public Service Costs

Without population growth, the per capita cost of providing public services in Unama'ki - Cape Breton could rise even as tax revenues decline.

#3: Retaining Local Companies

If the population and workforce is not renewed, firms that could relocate are at risk of leaving. Without access to a workforce, companies that can leave will leave.

#4: Rapid Wage Growth

With a tightening workforce, a lack of population growth locally could cause wages to rise much faster than other regions resulting in a competitive disadvantage.

#5: Retaining Local Service Levels

Even firms/organizations that serve the Unama'ki-Cape Breton market including health care, personal services and other needed industries that serve local populations could be impacted by a decreasing workforce.

#6: Maintaining School Enrollment

The K-12 school population could decline sharply without population renewal. Without population growth the number of K-12 students could decline by nearly 60 per cent by 2042.

#7: Maintaining Local Tax Revenue

Municipal government tax revenue could be eroded further with a decreasing population. A shrinking population and economy will curtail the amount of tax revenue flowing into municipalities.

Together these considerations make a strong case for provincial and federal government support for a growth agenda in Unama'ki - Cape Breton.

A thriving and prosperous Unama'ki - Cape Breton will benefit residents, businesses, municipalities and the Province of Nova Scotia.



Wentworth Park, Sydney



3.8 Emerging green shoots

There are several positive trends that lay the foundation for a sustained growth agenda in Unama'ki-Cape Breton if governments, industry, post-secondary education and other partners can align under this plan.

#1: The Population is Growing (modestly)

The population is up a robust 11 per cent among young people aged 20-34 in just the past five years. The number of immigrants and non-permanent residents hit a record in 2022 even as the number of people moving from elsewhere in Canada also hit a record. The number of international students at Cape Breton University and the community college campuses is unprecedented and hundreds are staying after graduation using the post-graduate work permit.

#2: The Labour Force is Growing

There were nearly 5,000 more people working in 2022 than back in 2018. In fact, the job market has not been this tight in recent memory. The job vacancy rate has more than doubled in the past few years.

#3: New Industries are Emerging and Traditional Sectors are Strengthening

New and emerging industries such as alternative energy, bioprocessing, and information technology will provide a strong boost to the region. Traditional sectors including tourism, arts and culture, forestry, agri-foods, fishing and aquaculture, and post-secondary education are all on a growth trajectory.

#4: Growing Innovation-Driven Entrepreneurship

High-tech entrepreneurship has been elevated as a result of the Verschuren Centre and other efforts to support start-up companies in the region.

The time is now to embrace these positive trends and use them as a platform for a sustained growth agenda.

4 Creating the economic development and population growth plan

The strategic planning process for the Unama'ki - Cape Breton economic development and population growth plan consisted of three phases.

Phase 1 included a detailed economic and demographic analysis, industry composition and trends, and a full review of the GATN work in 2019-2020. The analysis also included a review of previous economic development reports, strategic plans, sector analysis, related strategies and reports. Community business leaders, residents, municipal leaders, First Nations representatives, sector representatives, the Cape Breton Partnership Board and other key stakeholders were engaged to provide their insights post-pandemic.

Phase 2 resulted in **Forward. Together.** Unama'ki - Cape Breton's Population and Economic Growth Plan (this document). It details the economic development vision and mission for the region. It includes the goals, objectives and strategic actions that will move the region toward its vision and fulfill its mission.

Phase 3 is the implementation workbook that complements **Forward. Together.** and includes recommended short, medium and longer-term actions, key performance measures, and a format that can assist members of the Growth Network (Figure 1) in their efforts to collaborate and make progress toward our shared goals.



5 Priority industry opportunities

What industries are going to drive economic growth across the region in the years ahead?

The region has a number of industry sectors that are key to sustaining the economy and others that hold considerable growth potential. Identifying priority sectors will help stakeholders and rights-holders of the Island-wide Growth Network to focus their efforts. It will also be important to focus on developing service hubs around the Island to ensure the population does not face long commutes to access basic services and shopping. It is also important to ensure the **construction, healthcare, childcare, and retail service** sectors continue to grow in service hubs around the Island, which are critical to enable growth in the priority industry sectors as illustrated below.

5.1 Priority industry sectors

Industry clusters are concentrations of companies in a specific sector of the economy supported by other organizations and institutions such as industry associations, education providers as well as a local supply chain. Work to enlarge existing clusters and build sector strengths involves attracting investment, fostering entrepreneurship, developing supply chain opportunities and strengthening the value proposition through innovation, talent attraction and other cluster development activities. It also involves ensuring the workforce required is able to access a robust social infrastructure such as housing, healthcare and cultural amenities.

Figure 7: Unama'ki–Cape Breton's priority sectors

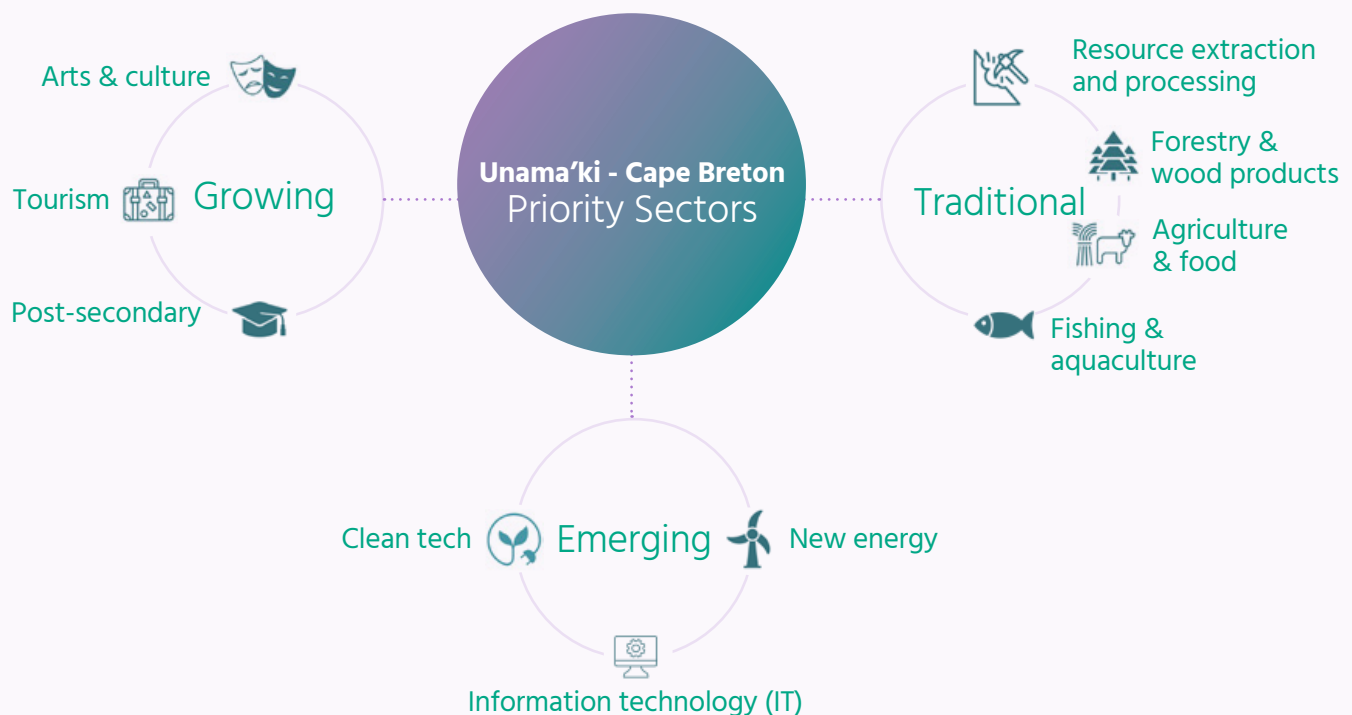


Table 2: Existing and emerging industry sectors explored

| Sector | Notes |
|--|---|
|  New energy | <p>Unama'ki - Cape Breton is ideally positioned to benefit from the move to decarbonize the global economy. The region has a long history of energy production. The electricity corridor between Labrador and New England passes through Unama'ki - Cape Breton. There is ample onshore and offshore wind and an abundance of fresh water, and two of North America's first planned green hydrogen production facilities. The region has two uncongested deep-water ports and other related infrastructure. Opportunities for geothermal, solar, and other energy sources are also evident. Over the next five to 10 years, there is opportunity for unprecedented investment.</p> |
|  Tourism | <p>The tourism industry in Unama'ki - Cape Breton is one of the region's most important and it is poised to be one of the region's largest growth industries. However, the sector is struggling to recover from the pandemic. It is also facing a workforce shortage and will require a new generation of entrepreneurs. The tourism sector will need new investment and a broad expansion of the workforce to reach its potential.</p> |
|  Arts & culture | <p>Cape Breton has deep cultural roots and has incubated many top Canadian artistic talents. The Indigenous population's cultural traditions span many hundreds of years. It is important to acknowledge arts and culture, not only as an economic sector (creating jobs, income, and GDP) but also for its contribution to the region's quality of life and long-term community cohesiveness.</p> |
|  Forestry & wood products | <p>The forestry sector has a long history and continues to be an important sector in Unama'ki - Cape Breton. Even prior to the COVID-19 pandemic, however, the industry was evolving due to changes in the pulp and paper industry in Nova Scotia. There are organizations looking at the next generation of the forest products sector and these efforts should be supported to ensure this sector continues its role as an economic engine in Cape Breton.</p> |
|  Agriculture & food | <p>There is room for growth in export-oriented value-added and local-oriented food and agriculture alongside Unama'ki - Cape Breton's existing large-scale dairy and egg farms, and smaller-scale vegetables, beef, and other livestock operations.</p> <p>The Island Food Network has established an Island-wide hub for the development of food related products and companies as part of the implementation of its Food Sector Strategic Plan. Over the next 10 years, the facility and related activities throughout the Island will support the development of new companies in the sector. A key challenge for the sector will be the attraction of new farmers and food-related entrepreneurs as well as the workforce needed for this sector.</p> |

It is important to ensure the **construction, healthcare, childcare, and retail service** sectors continue to grow in services hubs around the Island, which are critical to enable growth in other priority industry sectors.

| Sector | Notes |
|--|---|
|  Fishing & aquaculture | <p>Fishing and aquaculture continue to be a cornerstone industry for Unama'ki - Cape Breton. Many of the region's largest and longest-standing employers are in the harvesting and processing sectors and are poised to continue for many years to come.</p> <p>There is potential to amplify the economic impact of both wild and farmed seafood industries in Unama'ki - Cape Breton, particularly through new innovative companies working alongside established companies to develop new products and provide new and/or improved business-to-business products and services. There are several initiatives working toward these goals, including the O2: Oceans to Opportunity facility in Louisbourg and the efforts of Arc of the Coast Eastern Cape Breton Cooperative Alliance to promote sustainable aquaculture.</p> |
|  Resource extraction and processing | <p>The region is recognized for its long history in mining and resource extraction and there are opportunities for a resurgence in a variety of materials including: Limestone; aggregate; gypsum; copper; and metallurgical coal. There may also be opportunities in green steel manufacturing and the use of green energy to support mining and resource extraction operations.</p> <p>Environmental protection and social licence remain a top priority for Unama'ki - Cape Breton, making a project's ability to demonstrate a net benefit to the region a primary goal.</p> |
|  Information technology (IT) | <p>The information technology (IT) sector in Unama'ki - Cape Breton has experienced growth over the last decade, with an ever-growing number of local companies developing world-class tech-based products and services. Several local companies were purchased by major international tech companies. According to Statistics Canada's business counts, there was a 50 per cent increase in the number of IT firms in the region between 2015 and 2022. Much of the growth in this sector has been thanks to a robust suite of services and activities led by Invest Nova Scotia (which in 2023 absorbed Innovacorp, a provincial government crown-corporation that invests and supports tech start-ups).</p> |
|  Post-secondary education & research | <p>Cape Breton University has been a growth engine for Unama'ki - Cape Breton, growing the student population and expanding its programs and research. The two NSCC campuses are also continuing to increase their impact on the Island.</p> <p>There are specific opportunities within post-secondary education, most notably the development of ocean safety and training. The region already has multiple assets including the NSCC Nautical Institute in Port Hawkesbury and the Canadian Coast Guard College in the CBRM, as well as the new Ocean Innovation Centre. This is an important initiative that allows Unama'ki - Cape Breton to benefit from the Canadian Ocean Supercluster.</p> |
|  Clean technology & bioprocessing | <p>The Verschuren Centre is an emerging world-leader in clean technology and bioprocessing. The Centre's expertise and intellectual property shows tremendous commercialization potential and could kickstart a burgeoning industry sector in Unama'ki - Cape Breton. It will be important for the Verschuren Centre to work collaboratively with local businesses, entrepreneurs, government agencies, and NGOs to capitalize on these opportunities and help kickstart the start-up and growth of new companies in the sector.</p> |

5.2 Developing services and shopping hubs around the Island

As the region focusses on resident attraction it will be important to ensure there are services and shopping hubs across Unama'ki - Cape Breton. Communities will have lower success retaining residents if those residents have to drive 30-45 minutes to access basic services and shopping. Communities such as Port Hawkesbury, Cheticamp and Inverness act as services and shopping centres now and there is potential to expand these hubs. Attracting and retaining these companies and ensuring they have sufficient human resources will be an important component of the resident attraction and retention efforts.

5.3 First Nations economic development

The five First Nations communities in the region have been expanding their economic footprint in recent years and there is significant potential for future growth for local services delivery, tourism, and natural resources-based economic development.

5.4 Remote work

The attraction of remote workers is also an area of opportunity. Remote workers are professionals that could be located anywhere but choose to live in Unama'ki - Cape Breton to take advantage of the lifestyle, recreational opportunities, and the lower cost of living. There are challenges that need to be addressed including the need for better air transportation and access to housing.

The five First Nations communities of Unama'ki - Cape Breton have experienced substantial economic growth in recent years.





6 Economic development and growth plan elements

The Unama'ki - Cape Breton Economic Development and Population Growth Plan elements consists of the following five stages: Vision, mission, pillars/goals, objectives and actions as defined in Figure 8 below:

Figure 8: Economic Development and Population Growth Plan Elements



Guiding principals

Core beliefs that define what the organization believes and how it will behave

The following pages detail the Unama'ki - Cape Breton Economic Development and Population Growth Plan vision, mission, guiding principles, pillars/goals, objectives and actions.



7 A vision for 2030

Vision

Unama'ki - Cape Breton is a growing and prosperous region known for its vibrant, diverse, inclusive, united, and welcoming population.

Mission

To grow the economy, workforce and population of Unama'ki – Cape Breton.

Guiding Principles

Collaboration and community:

We are all in this together.

Relationships and reconciliation:

We are all treaty people.

Energy and optimism:

A better future begins with better attitudes.

Inclusion and diversity:

The economy works best when it works for everyone.

People and environment:

Our greatest assets working in harmony.

Innovation and creativity:

Our creative spirit is the key to our success.



8 Strategic pillars and goals



Mabou

This strategic plan is founded on six strategic pillars:

1. People

2. Inclusion

3. Reconciliation

4. Strong communities

5. Entrepreneurship and business growth

6. Innovation

The strategic pillars were developed based on broad engagement with residents and newcomers to Unama'ki - Cape Breton, over 40 community and economic development stakeholders and the board and employee team of the Cape Breton Partnership. The strategic pillars describe the end state that the Cape Breton Partnership and other stakeholders want to achieve. Objectives are the desired outcome as a result of the end state. The vision and mission will be achieved through the coordination and integration of the interconnected goals, objectives and related actions that are detailed in the following pages.

Table 3: Goals and Objectives

| | Pillars/Goals | Objectives |
|---|--|--|
|  | 1 People: A growing population with a focus on workforce development. | Develop and attract talent to the region aligned with workforce demand. |
|  | 2 Inclusion: An economy that works for everyone. | Facilitate greater participation and economic benefit for under-represented and marginalized people. |
|  | 3 Reconciliation: Reconciliation through economic development partnerships. | Work with First Nations communities to support the achievement of their own economic development goals. |
|  | 4 Strong communities: Capacity to support growth throughout the region. | Strengthen economic development, population retention and related infrastructure development at the community level. |
|  | 5 Entrepreneurship and business growth: A culture of entrepreneurship and high-quality companies. | Foster a culture of entrepreneurship and attract and grow high quality companies in our region. |
|  | 6 Innovation: A resilient, progressive economy. | Grow key sectors of the economy through innovation. |

9 Strategic actions



Pillars/Goals

People: A growing population with a focus on workforce development

Objectives

Develop and attract talent to the region aligned with workforce demand.



Alexander Graham Bell Museum,
Baddeck

Pillar 1: People

Cape Breton has a significant demographic challenge as outlined in the Unama'ki - Cape Breton Growth Imperative Report (Appendix A). There are not enough young people entering the workforce to replace those retiring, let alone to support sector growth opportunities. The job vacancy rate has more than doubled in the past five years. The nominal unemployment rate is the lowest it has been in decades. Worker shortages are also hampering attempts to build more houses and infrastructure across the Island.

This imbalance represents an unprecedented opportunity to attract workers, entrepreneurs and families to Unama'ki - Cape Breton to meet workforce needs now and to create a stronger demographic foundation for the future.

The opportunity to live and work in Unama'ki - Cape Breton should be promoted far and wide including to the many tens of thousands of Cape Bretoners who have left the region over the past 20-30 years to find work and economic opportunities.

The region's economic development and population attraction marketing should be focussed on digital communications. Comprehensive economic development information for prospective investors, residents and others seeking information about Unama'ki - Cape Breton should be easily accessible. Regional online collaborations such as WelcomeToCapeBreton.ca, EntrepreneurCB.com, and CapeBretonJobBoard.com should be cross promoted by municipal governments and by all economic development partners. Coordinated efforts to promote these sites to prospective visitors, residents, students, entrepreneurs and investors should be central to economic development marketing efforts.

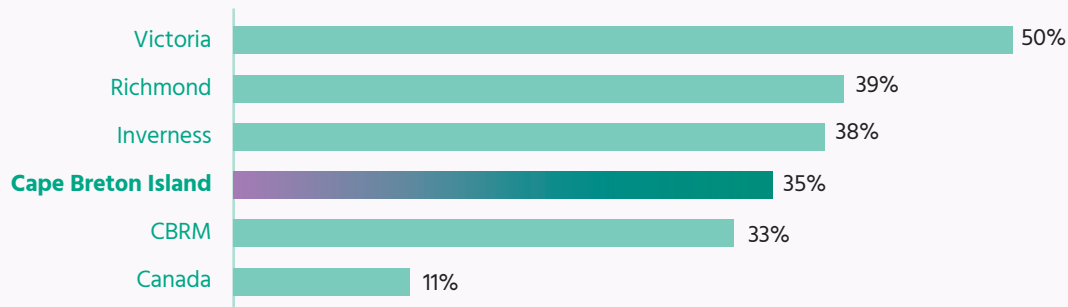
It is important for economic development partners to align people attraction efforts to workforce demand. Post-secondary education is a key partner and a vital conduit for national and international talent. Long term retention of newcomers is primarily tied to alignment between the skills and interests of the people attracted to the region and the jobs and economic opportunities on offer in the region. If a person is over-qualified for their job, long-term retention is much more difficult.

Because of its industrial structure, the Unama'ki - Cape Breton region has one of the most seasonal workforces in Canada. As shown in Figure 9, 35 per cent of all workers (persons earning employment incomes across the Island) received EI income at some point during the year.



The seasonal nature of work on the Island has led to a higher nominal unemployment rate while “real” unemployment across the region has declined to the point where it is difficult to recruit workers in many sectors of the economy. Seasonal industries (e.g., fishing, tourism, etc.) are important to the regional economy and a new seasonal workforce strategy should be developed.

Figure 9: Share of the workforce collecting Employment Insurance in 2019



Source: Statistics Canada Census 2021.

First Nations communities have many economic opportunities in development but are facing workforce shortages and skills gaps. The Cape Breton Local Immigration Partnership, Cape Breton Partnership, First Nations and other aligned organizations should work together to address workforce development and investigate building new efforts where gaps exist.

Actions:

1.1 Attract and retain newcomers, former residents, and young talent.

- Encourage First Nations, municipal governments and other economic organizations, departments and agencies to cross promote regional online collaborations such as WelcomeToCapeBreton.ca, EntrepreneurCB.com, and CapeBretonJobBoard.com.
- Building on existing initiatives, promote Unama'ki - Cape Breton across Canada and beyond as a place to live and work.

1.2 Identify and address workforce demand.

- Develop short and longer-term local workforce demand and population growth targets for local communities around Cape Breton Island.
- Assess and address short-term skills mismatches and worker shortages.
- Increase newcomer retention in Unama'ki - Cape Breton by increasing access to services, creating welcoming communities, and supporting employers to attract and retain workers in the workplace.
- Develop sector-specific workforce development plans through engagement with local employers.
- Engage post-secondary education institutions such as Cape Breton University, NSCC Strait Area Campus, NSCC Sydney Waterfront Campus, Université Sainte-Anne, and private skill-developing agencies in a formal way to address workforce demand. Identify specific programs that would meet local demand.
- Develop seasonal industries workforce strategies (tourism, fisheries, etc.) targeting those specifically interested in seasonal work such as senior workers, PSE students and international workers.
- Partner with First Nations to address skills gaps in the workforce.



Pillars/Goals

Inclusion: An economy that works for everyone.

Objectives

Facilitate greater participation and economic benefit for under-represented and marginalized people.

Pillar 2: Inclusion

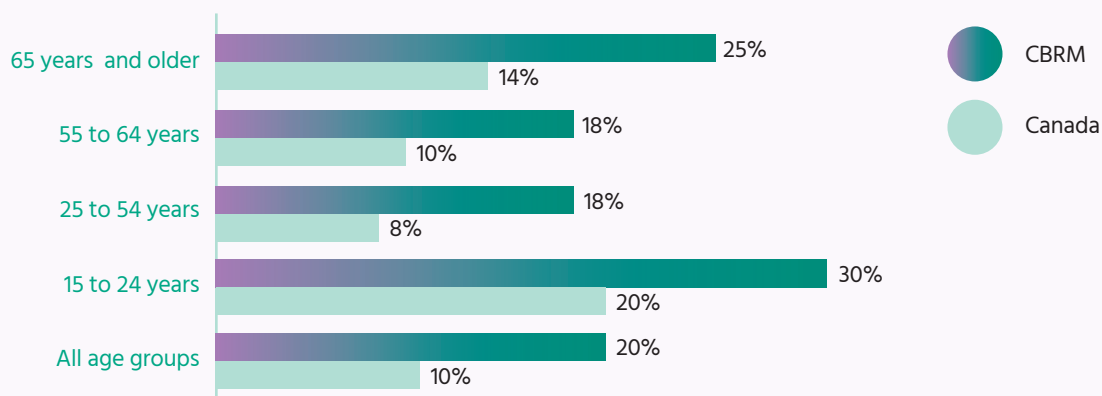
Unama'ki - Cape Breton should provide an environment where every individual is valued and has the capacity and skills to contribute to their community.

The region is currently addressing issues related to equity and inclusion. Nearly one in five individuals (18 per cent) live in low income (based on the low-income measure) after tax (LIM-AT), which is above both the national rate (11 per cent) and the provincial rate (15 per cent). One quarter (24 per cent) of young people (age 0-17) live below the poverty line using this measure. Strengthening economic opportunities is an important way to boost household income and reduce poverty throughout the region.

Over 11 per cent of the population aged 25-64 does not have a high school diploma, a rate which is considerably higher than both provincial and national levels. Without a high school diploma or specific trades skills, it is increasingly difficult to find and keep a job.

Participation in the workforce by Indigenous people is also an area for improvement. According to the 2021 Census, the unemployment rate of the Indigenous population in CBRM was twice the level compared to the rest of the country.

Figure 10: Unemployment rate, Indigenous population, 2021*



In recent years, the region has become more multicultural, particularly in CBRM, with the influx of international students. These international students have the potential to contribute to the region's population, workforce, entrepreneurial base, consumer spending, taxes and innovation. The region needs to embrace diversity in its businesses, institutions, and the public sector. Newcomers should feel welcome in the community and should not face any barriers because of their background or ethnicity.

Ensuring that everyone who wants to participate in the workforce has the education and skills to do so will be an important part of broader community efforts to foster inclusion.

Actions:

2.1 Collaborate with economic development, employment, education and community partners to provide economic benefit for all.

- Identify potential local target groups such as under-represented groups and those with low participation for workforce development opportunities.
- Educate employers on the benefits and the process for hiring immigrants and international students.
- Collaborate with First Nations communities to address skills gaps in the workforce.



Pillars/Goals

Reconciliation:

Reconciliation through economic development partnerships.

Objectives

Work with First Nations communities to support the achievement of their own economic development goals.

Pillar 3: Reconciliation

Mi'kmaw community leaders and residents participated in an extensive engagement process in 2019, 2020 and again in 2022 in which they identified a number of priorities for the Unama'ki - Cape Breton Economic Development and Population Growth Plan. The key priorities are summarized in Table 4 below. This strategy presents an opportunity for First Nations, the Cape Breton Partnership and other interested parties to address their shared goals.

Table 4: Unama'ki Economic Development and Growth Plan priorities

| First Nations communities' economic development and growth plan priorities |
|---|
| Continuing relationship building between service providers, municipalities, and First Nations communities. |
| Matching skills development among community members with future employment needs. |
| Increasing awareness among non-Indigenous businesses, organizations and leadership of the barriers and challenges faced by First Nations communities and the opportunities for partnership. |
| Engaging in community planning and workforce development coordination. |
| Helping to secure long-term investment funding. |
| Developing the Indigenous tourism sector. |
| Engaging with Indigenous businesses for procurement opportunities related to large capital projects. |
| Enhancing support for Indigenous entrepreneurs. |
| Advancing Treaty education in the business community. |

Actions

3.1 Learn from and collaborate with Indigenous communities to achieve economic development goals together.

- Formalize the working relationship between settler-led communities and organizations and representatives of Mi'kmaw communities, businesses and organizations (i.e. establish meeting times and frequency, objectives, terms of reference, etc.).
- Partner with Mi'kmaw communities to address skills gaps in the workforce (see also Goal 2).

3.2 Expand engagement with Indigenous communities in all local economic development projects.

- Foster a collaborative economic development ecosystem involving all Unama'ki - Cape Breton Mi'kmaw communities, municipalities, and all members of the Island Wide Growth Network (see figure 1).





Pillars/Goals

Strong communities:

Capacity to support growth throughout the region.

Objectives

Strengthen economic development, population retention and related infrastructure development at the community level.

Pillar 4: Strong communities

Economic development and population growth happens in local communities. Unama'ki - Cape Breton is a large geographic area covering over 10,000 square kilometres. Driving from Port Hawkesbury to Chéticamp takes nearly two hours by car. The industrial base, commercial development opportunities, and population growth needs vary widely by community within the region.

It is important for the Cape Breton Partnership and its partners to support municipal governments, chambers of commerce and other local partners to ensure there is capacity throughout the region for economic development, population attraction and retention and related infrastructure development.

Local partners should work with local communities to ensure they are “investment ready”. At its core investment readiness means having serviced land and buildings where businesses can establish and grow. Ideally, the land and building inventory will be diverse, with a strong core of privately-held land for development complemented by municipally-owned land in strategic locations. Attractive land and building sites, such as those in industrial parks, should be cross promoted and marketed on regional online collaborations such as WelcomeToCapeBreton.ca, as previously noted.

Investment readiness includes establishing designated points of contact with sufficient knowledge and the ability to respond to economic development and business-related inquiries. It includes instituting planning principles and processes with reasonable timeframes, straightforward approvals processes and predictable timing and costs.

Investment readiness includes regular engagement with the business community to understand the challenges and opportunities they are facing. It also requires connections with the appropriate interested parties to get things done.

Entrepreneurship support, immigrant settlement, housing, broadband and employment land development are activities that can be supported centrally but delivered locally. All economic development partners should be encouraged to organize, collaborate, and agree on centralized and localized services to expand their individual capacity while addressing the specific needs and priorities of each community.

Given the large geography, local partners should have an “urban” population hub approach to regional economic development. Population centres such as Sydney, Port Hawkesbury and Inverness (among others) should be the focus for regional services such as retail, personal and business services, health care and education, relative to the size of the regional population.

Services requiring a large urban centre should be concentrated in Sydney. As an example, the airport with scheduled daily flights should be focussed at the J.A. Douglas McCurdy Airport in Sydney, while the Allan J. MacEachen Airport in Port Hastings should serve as a key transportation partner in southern Unama'ki - Cape Breton.





Hawk's Dream Field, Dominion

Actions

4.1 Provide economic development support to municipalities and local development partners.

- Work with municipal and provincial partners to ensure there is appropriate economic development capacity across the Island.
- Provide support to municipalities as they develop housing development plans and forecasts. Assess the existing housing supply and project demand in the Housing Needs Assessment for Nova Scotia to identify, align, and promote areas for private-sector investment.
- Work with municipalities and First Nations on economic development infrastructure plans (employment lands, broadband and cellular, and efforts to build out “last mile” broadband infrastructure, transportation, etc.).
- Work with municipalities and First Nations communities on local services attraction and retention plans (including childcare, health care and other local services).
- Provide economic development training and resources for relevant municipal staff.
- Provide regular updates to municipal councils on economic development trends, activities, and metrics.

4.2 Establish/maintain economic hubs and service centres.

4.3 Bring post-secondary education and research into communities.

- Build from the work of the World Tourism Institute, Mitacs and other academic research organizations.

4.4 Support the development of welcoming communities.

- Work with municipal and provincial partners to ensure there is appropriate people attraction activity to support local workforce demand around the Island. (see talent attraction Goal 1).
- Work with local communities to ensure new immigrants (and migrants) are supported.

4.5 Ensure communities are investment ready.

- Conduct investment readiness assessments at the local community level.
- Establish a “no wrong door” approach where all prospective investors and existing businesses are directed to the Cape Breton Partnership or other economic development partners who can triage and direct inquires appropriately.
- Work with First Nations to attract local services and other commercial activity.
- Schedule regular meetings for local and regional economic development partners.

Post-secondary education providers should consider ways to continue to expand their footprint across the Unama’ki - Cape Breton region. Post-secondary education providers should be encouraged to explore opportunities to expand across the region such as:

Training in local communities (e.g., NSCC’s satellite locations in Wagmatcook and Eskasoni).

Training for specific businesses or industries (e.g., the World Tourism Institute micro-credentials).

Full-time courses in areas where there is adequate demand.





Pillars/Goals

Entrepreneurship and business growth:

A culture of entrepreneurship and high-quality companies.

Objectives

Foster a culture of entrepreneurship and attract and grow high-quality companies in our region.

Pillar 5: Entrepreneurship and business growth

Population growth alone will not be sufficient to grow the regional economy. Unama'ki - Cape Breton will also need to attract new industries and/or grow the region's traditional industrial base. Unama'ki - Cape Breton needs a new generation of ambitious entrepreneurs and new sector opportunities to grow the economy.

Section 5 of this report identifies traditional, growing and emerging industry sectors that hold potential for Unama'ki - Cape Breton based on emerging trends in Nova Scotia and across the country and engagement with local interested parties. The priority sectors include:

Traditional Sectors

Forestry
Agriculture and food
Fish: processing, aquaculture
Resource extraction and processing

Growing Sectors

Tourism
Arts and culture
Post-secondary education

Emerging Sectors

New energy – offshore wind, hydrogen
Information technology
Clean technology & bioprocessing

It is important to ensure the **construction, healthcare, childcare, and retail service** sectors continue to grow in services hubs around the Island, which are critical to enable growth in other priority industry sectors."

Some of the opportunities can be grouped under an "oceans" theme as the region has strong potential to develop offshore wind, port opportunities, aquaculture and value-added fish processing and related activities.

The tourism and arts and culture sectors are mainstays of the regional economy. The tourism sector is rebounding in 2023 after it was seriously impacted by the pandemic. The sector must address several strategic challenges including business owner retirement, a lack of summer workers and the need for investment in tourism infrastructure. Destination Cape Breton is the lead organization responsible for developing the tourism sector.

A rapidly evolving energy sector represents a key strategic opportunity for the region. Unama'ki - Cape Breton is well positioned to benefit from the energy transition underway across Canada and the world. At the same time, the region will lose many high-paying jobs when the coal-fired electricity plants are decommissioned. The Cape Breton Partnership and other interested parties need to ensure that the region benefits from the growth of sectors such as offshore wind, both in the short term and in the longer term (maintenance, support, and related businesses).

Industry analysis and community engagement revealed that the region's potential for further opportunities in agriculture, forestry and mining is constrained because of a lack of proactive development. The Cape Breton Partnership and related organizations should work to identify potential opportunities and local capacity to develop those opportunities.

Actions

5.1 Further develop oceans opportunities.

- a. Work with sector partners and Invest Nova Scotia to develop ocean sector-specific investment attraction plans.
- b. Develop marketing materials and promote ocean sector-related growth opportunities on the Island.
- c. Work with local and sector-specific partners to identify new growth opportunities in the ocean sector for the Island.
- d. Continue to champion and support large-scale infrastructure projects (e.g., port infrastructure, wind energy infrastructure, etc.) that enable broader economic development opportunities.

5.2 Further develop the tourism sector.

- a. Support Destination Cape Breton's efforts on tourism development as outlined in the Rise Again 2030 Strategic Plan.

5.3 Leverage energy transition opportunities.

- a. Develop marketing materials and promote growth opportunities related to sustainable green energy development on the Island.
- b. Support green energy sector development organizations aligned with growth opportunities.
- c. Work with local and sector-specific partners to identify green energy opportunities for the Island.

5.4 Build on traditional industry strengths.

- a. Engage with First Nations and municipalities to explore opportunities presented by Unama'ki - Cape Breton's natural resources and potential of resource extraction development.
- b. Stand up and/or support new ad hoc organizations when needed to explore new development opportunities (i.e., groups set up to consider the future of forestry/forest products and the Strait of Canso Offshore Wind Task Force) including industry, government and other related stakeholders.
- c. Continue to champion and support large-scale infrastructure projects that enable broader economic development opportunities (e.g., port infrastructure, wind energy infrastructure, etc.).

5.5 Support entrepreneurship and start-up development.

- a. Foster greater access and integration of Indigenous entrepreneurs into the region's start-up support ecosystem.
- b. Continue to support the region's start-up ecosystem.
- c. Promote entrepreneurship as a viable opportunity.
- d. Provide training programs that support new small business owners.

5.6 Work with sector partners and Invest Nova Scotia to develop sector-specific investment attraction plans (for tourism, biosciences, etc.).

- a. Develop marketing materials and promote key sectors and related growth opportunities on the Island.

5.7. Support employers and partners to fill sector-specific labour gaps in Unama'ki - Cape Breton.

- a. Identify barriers and challenges (including credentials) to filling in-demand jobs such as skilled trades and nursing.
- b. Identify labour markets with the skills required to improve our economy, and target those markets for population attraction.



Arichat



Pillar 6: Innovation

Innovation will be key as Unama'ki - Cape Breton works to build a thriving economy that attracts top talent and business investment. Many of the region's export sectors are facing increased national and international competition. Technology and process innovation are forcing change in virtually all industries.

Pillars/Goals

Innovation:

A resilient, progressive economy.

Objectives

Grow key sectors of the economy through innovation.

Unama'ki - Cape Breton has less innovation capacity than many other regions of comparable size. For example, the region has less workers employed in related industries compared to other regions in Nova Scotia. CBRM has fewer workers (relative to size) in professional, scientific and technical services (overall) compared to the other four urban centres in Nova Scotia. CBRM also has fewer workers in management, scientific and technical consulting services and in scientific research and development services (Table 5). The region's innovation capacity is growing however. The Verschuren Centre is nationally recognized as an incubator of bio-based companies. Cape Breton University is expanding its research activity and has added a medical campus.

Table 5: Employment in innovation-capacity sectors, per 10,000 in the overall workforce, 2021

| Industry: | CBRM | Nova Scotia | Halifax CMA | Kentville CA | New Glasgow CA | Truro CA |
|--|------------|-------------|-------------|--------------|----------------|------------|
| Professional, scientific and technical services (overall) | 358 | 640 | 883 | 447 | 382 | 392 |
| Subsector: Management, scientific and technical consulting | 29 | 76 | 103 | 77 | 41 | 41 |
| Subsector: Scientific research and development services | 8 | 27 | 39 | 17 | 9 | 20 |

Source: Statistics Canada 2021 Census.

Outside CBRM there are also several innovation assets and opportunities. Recent work completed by the Cape Breton Strait MIT REAP team on the Strait Region identified a number of innovation-led economic development opportunities including Marine and Ocean Technology. The REAP Team also identified the post-secondary education infrastructure in the Strait area (including Nova Scotia Community College and St. Francis Xavier University in Antigonish) and large corporate players such as Port Hawkesbury Paper, Everwind, Cabot Gypsum and Bear Head Energy as potential catalysts for additional innovation-led economic activity.

Across Nova Scotia there are several innovation-focussed organizations with provincial mandates. The Cape Breton Partnership should investigate ways to leverage these organizations in Unama'ki-Cape Breton even if they are based in Halifax.

Actions

1. Support innovation and productivity through the Island's development organizations aligned with growth opportunities (e.g., Destination Cape Breton, Verschuren Centre, Cape Breton-Richmond Federation of Agriculture, CME, Cape Breton Strait MIT REAP team, etc.).
2. Expand rural access to capital for growth and innovation.
3. Connect local and sector-specific partners with opportunities and supports for innovation.
4. Engage with First Nations and explore opportunities to partner on innovation-related projects and natural resources development.
5. Leverage and partner with post-secondary institution research centres.
6. Ensure Unama'ki - Cape Breton benefits from the provincial research and innovation ecosystem.

10 Next steps

Forward. Together. is the culmination of detailed economic and demographic analysis, comprehensive stakeholder engagement and thoughtful consideration of the economic opportunities and aspirations for the region. It outlines the Cape Breton Partnership's vision to lead the economy forward after a period of great change for the region's municipalities, its businesses and residents.

Forward. Together. outlines six pillars that will position the region for prosperity by attracting talent, ensuring an inclusive approach to development, focussing on reconciliation with First Nations and Indigenous populations, building capacity for growth in regional municipalities and supporting innovative entrepreneurship and industry growth.


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This is a bold, ambitious plan that will require investments of time, energy and financial resources.

The final phase of **Forward. Together.** is the implementation plan that complements this plan and includes recommended timelines, partners and priorities for the actions detailed in this document. The implementation plan also suggests metrics and performance measures that will assist in tracking movement towards the Growth Network's goals and help track and analyze progress to municipal councils, the business community, prospective investors and the people that live and work in the region.

Scan here for the
complete plan





The only way we can move forward
to a stronger tomorrow,
is by doing so together today.



Forward. **Together.**

This document was prepared by the Cape Breton Partnership
with collaboration from all of Unama'ki - Cape Breton.

