



**Bay du Nord Project,
Socio-Economic Impact Statement**

Final Report

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Executive Summary

Equinor Canada Ltd. (Equinor) and co-owner BP Canada Energy Group ULC (BP), are proposing to develop the Bay du Nord Project (the Project). The Project is a combination of discovered resources, where hydrocarbons have been proven, and prospects, where there is the potential for hydrocarbons. The Development Application is for the planned development of the Bay du Nord and Cambriol fields, and considers the deferred developments of the Cappahayden, Harpoon, and Baccalieu fields. This Socio-Economic Impact Statement (SEIS) assesses the effects of the Project on the socio-economic environment, specifically the effects on two Valued Components (VCs). These VCs have been chosen because they have been assessed for previous offshore petroleum projects in Newfoundland and Labrador (NL) and because they represent the socio-economic issues that have typically been of the greatest public interest.

These are:

- Economy, Employment and Business; and
- Community and Regional Infrastructure and Services.

The SEIS also describes management measures that Equinor will implement to reduce potential adverse effects and enhance the positive effects of the Project.

This SEIS presents a range of baseline data which have been used for the socio-economic assessment of the Project. This includes information on the capacity of community services and infrastructure in areas that might be affected by the Project, to determine their ability to absorb any Project-related demands. As in past NL offshore petroleum project SEISs, these are assessed separately for different 'impact areas', which are the areas within commute range of locations or centres of potential Project activity. However, because fabrication contracts have not been awarded at the time of writing, and the contracts may involve only some of a number of fabrication yards in different communities, this SEIS assesses several Potential Impact Areas. It is likely that some will see no fabrication activity.

Socio-economic effects may be adverse, beneficial, or both, and the management of those effects includes ways to reduce and prevent adverse effects and create and increase beneficial effects. Potential effects on Economy, Employment and Business derive from Project expenditures on labour, goods and services and from changes in Project demand for labour. Project expenditures will generate positive economic effects by creating direct, indirect, and induced employment and economic activity, while Project demands could also cause labour shortages and wage inflation. Project activities and any Project-related population growth have the potential to increase the demand for Community and Regional Infrastructure and Services, including water, sewer, waste, healthcare, transportation, and emergency services.



Given that the Project will generate economic opportunities, and that infrastructure and services in the Potential Impact Areas have capacity to absorb any increased short-term demands, potential residual socio-economic impacts of the Project are anticipated to be predominantly positive, assuming the mitigation and enhancement measures outlined in this SEIS are implemented.



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Acronyms

3D	Three dimensional
4D	Four dimensional
CBSA	Canada Border Services Agency
CIAP	Centre for Institutional Analysis and Planning
CNA	College of the North Atlantic
C-NLOER	Canada-Newfoundland and Labrador Offshore Energy Regulator
C-NLOPB	Canada-Newfoundland and Labrador Offshore Petroleum Board
CSI	Crime Severity Index
CSD	Census Subdivision
E&T	Education and Training
ERINL	Energy Research and Innovation Newfoundland and Labrador
Equinor	Equinor Canada Ltd.
GBA+	Gender-Based Analysis Plus
GBS	Gravity-Based Structure
GDP	Gross Domestic Product
FEED	Front End Engineering Design
FPSO	Floating Production, Storage and Offloading
ISPS	International Ship and Port Security
K	Kindergarten
km	kilometres
2SLGBTQI+	Two-spirit, lesbian, gay, bisexual, transgender and/or gender expansive, queer and/or questioning, intersex
m	metres
M ³ /d	metres cubed per day
ML/d	Megalitre per day
NL	Newfoundland and Labrador
NLDF	Newfoundland and Labrador Department of Finance
NOIA	Newfoundland Offshore Industry Association
NLT	Newfoundland and Labrador Tourism
NLTCAR	Newfoundland and Labrador Department of Tourism, Culture, Arts, and Recreation
NLTI	Newfoundland and Labrador Department of Transportation and Infrastructure
PRAC	Petroleum Research Atlantic Canada
PRNL	Petroleum Research Newfoundland and Labrador
PY	Person years
POB	Personnel on Board



Bay du Nord Project, Socio-Economic Impact Statement
Acronyms
March 2026

R&D	Research and Development
RCMP	Royal Canadian Mounted Police
RNC	Royal Newfoundland Constabulary
SEIS	Socio-Economic Impact Statement
SJIAA	St. John's International Airport Authority
SJPA	St. John's Port Authority
SJRFD	St. John's Regional Fire Department
SURF	Subsea Umbilicals, Risers and Flowlines
VC	Valued Component



1 Introduction

Equinor Canada Ltd. (Equinor) and co-owner BP Canada Energy Group ULC (BP), are proposing to develop the Bay du Nord Project (the Project). The Project is a combination of discovered resources, where hydrocarbons have been proven, and prospects, where there is the potential for hydrocarbons. The Development Application is for the planned development of the Bay du Nord and Cambriol fields, and considers the deferred developments of the Cappahayden, Harpoon, and Baccalieu fields.

The Canada-Newfoundland Offshore Energy Regulator (C-NLOER) requires that a Development Application be submitted with several ancillary documents, including a Socio-Economic Impact Statement (SEIS). The purpose of a SEIS is to set out a proponent's analysis of the anticipated effects of the proposed project on social, demographic and labour market factors, as well as on public infrastructure and other land and resource uses. It is an explicit intent of the legislation that oil and gas developments be implemented and managed in a manner that creates a lasting economic legacy for the people of Newfoundland and Labrador (NL).

Through the Project, Equinor is committed to creating and optimizing opportunities and benefits for NL and other Canadian workers and companies. This SEIS will describe the Project's estimated contributions to Gross Domestic Product (GDP), and benefits to the Province through Education and Training (E&T), opportunities for the local service and supply community, and Research and Development (R&D) activity, which will further expand NL's industrial capabilities.

This SEIS assesses the effects of the Project on the socio-economic environment, specifically the effects on two Valued Components (VCs) which represent the socio-economic issues that have typically been of the greatest public interest:

- Economy, Employment and Business; and
- Community and Regional Infrastructure and Services.

1.1 Project Concept

The Project includes offshore activities associated with drilling, construction, installation, hook-up and commissioning, production and maintenance, and eventual decommissioning, as well as associated supporting surveys, fieldwork, and supply and servicing activities.

Offshore drilling, construction and installation are currently scheduled to begin in 2029. Production and maintenance are anticipated to start in 2031. The Project has a production life of 20 years. If additional resources are developed and/or discovered and added to the Project, production could be extended. The preliminary schedule for the Project is illustrated on Figure 1-1, which is subject to change based on regulatory approvals, Front End Engineering Design (FEED), detailed design, and execution planning phases.



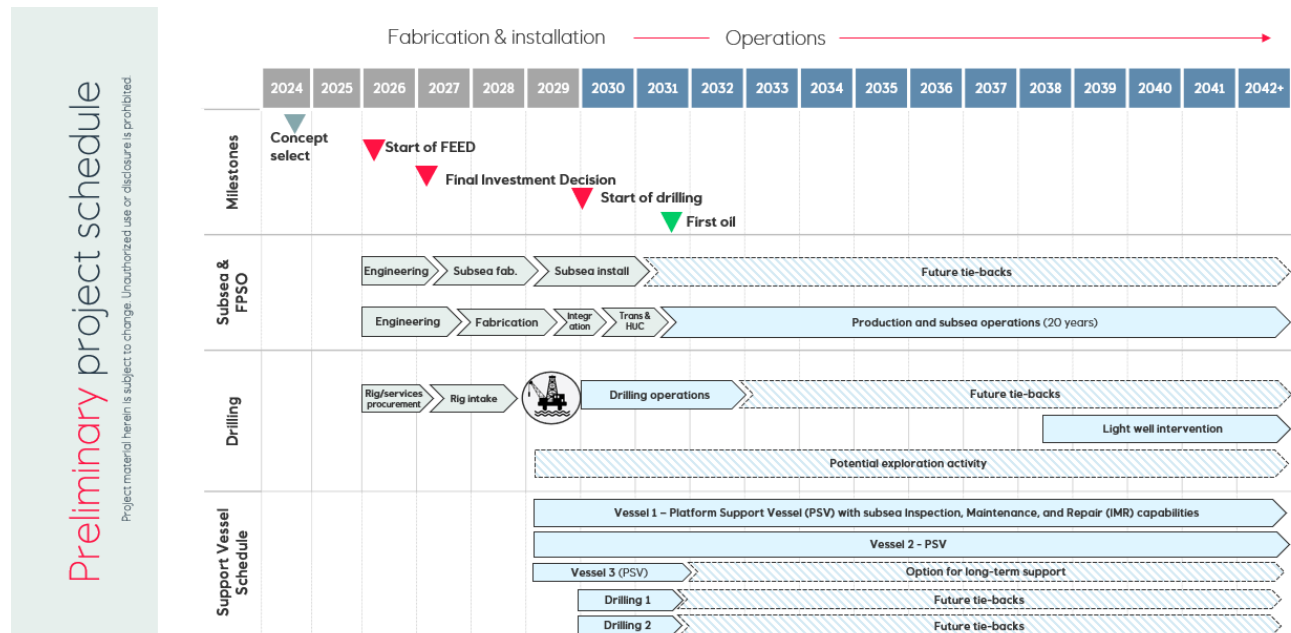


Figure 1-1 Preliminary Project Schedule

The Floating Production, Storage and Offloading (FPSO) vessel will be located approximately 475 km offshore from St. John’s, NL. Crude oil will be offloaded from the FPSO to shuttle tankers.

Equinor has considered the existing fabrication and construction capacity in NL and does not see the need for additional facilities as part of the Project. The FPSO and subsea infrastructure will be constructed at existing or upgraded fabrication yards locally, nationally, and internationally depending on capacity and fabrication requirements, and in compliance with the Government of NL Framework Agreement and the *Canada-Newfoundland and Labrador Atlantic Accord Implementation and Offshore Renewable Energy Management Act* and the *Canada-Newfoundland and Labrador Atlantic Accord Implementation and Offshore Renewable Energy Management Newfoundland and Labrador Act* (the *Accord Acts*).

From a staffing perspective, the Project has four main components:

- Pre-Development and Development;
- Drilling and Well;
- Subsurface; and
- Operations.

Workforce requirements within each area will shift over time as the Project advances from planning and construction through to long-term production. As activity levels change, so too will the type and intensity of labour demand NL.



During the pre-development and development phase, the Project will generate engineering, technical, and fabrication activity within NL. This stage includes engineering and design work, project management, procurement management, as well as construction and fabrication activities carried out at provincial facilities. Overall, this phase will create demand for skilled trades, technical specialists, engineers, and other professional roles within the province.

Drilling activities will be supported primarily by a specialized drilling contractor, which will provide the majority of offshore personnel associated with the drilling program. These operations will be centered on drilling installations and supported by onshore office staff, logistics personnel, and marine coordination teams. As a result, the drilling phase will drive employment not only offshore but also across supply chain, transportation, and logistical support services in NL.

The Subsurface team, based in St. John's, will be responsible for geology, geophysics, petrophysics, reservoir engineering, and production technology. Staffing in these areas is expected to grow during the early phases as resource evaluation and development planning activities intensify. Over time, responsibilities will transition toward production optimization and resource management during operations. Continued evaluation of development opportunities and enhanced recovery initiatives will remain anchored in NL, supporting sustained high-skilled technical employment within the province.

Once the Project enters the operations phase, ongoing employment will extend across logistics, engineering, technical support, drilling and well services, marine transportation, catering, IT and digital systems, and research and development. Operations will require both offshore and onshore personnel. A dedicated onshore integrated operations centre will oversee much of the day-to-day coordination, reinforcing long-term employment within NL.

The Project anticipates the use of a ship-shaped FPSO. The vessel will be designed to accommodate operational personnel required for routine production, maintenance activities, commissioning, and turnaround campaigns. Staffing levels offshore will vary depending on operational demands, while operational oversight and technical support will be provided from shore. The FPSO design will emphasize safety and technical integrity throughout its service life.

Project service and supply activities will be conducted from a local supply base within NL, supporting marine services, warehousing, transportation, equipment handling, and other logistics functions. This local infrastructure will play a central role throughout both development and operations.

Overall, the Project represents a substantial and evolving source of employment and economic activity within Newfoundland and Labrador. Labour demand will fluctuate across phases, but collectively the Project will support a broad range of skilled trades, professional disciplines, technical expertise, and operational support functions over its lifecycle.



1.2 Regulatory Requirements and Guidance

The C-NLOER¹ requires that a Development Application be submitted with several ancillary documents, including a SEIS. The concept of a SEIS is raised in paragraph 44(2)(c) of the *Accord Acts* in the context of a public review for a development. The purpose of a SEIS has been to set out a proponent's analysis of the effects the proposed project is anticipated to have on a variety of social, demographic and labour market factors, as well as on public infrastructure and other land and resource uses. It is an explicit intent of the legislation that oil and gas developments be implemented and managed in a manner that creates a lasting economic legacy for the people of the Province.

The C-NLOER does not have current SEIS guidance, however, SEIS guidance from a draft, historical version of the Benefits Plan Guidelines (C-NLOPB 2016) was taken into consideration.

1.3 Sustainable Development

At Equinor, sustainability includes responsible social and economic performance, enabling business resilience and creating lasting local value. The Project will be a major contributor to the economic development of NL. As the Province's fifth major offshore petroleum project, it will build on and contribute to the multi-phase offshore petroleum industry in the Province. In particular, the Project will provide substantial benefit through Education and Training (E&T), business for the local service and supply community, and Research and Development (R&D) activity, further expanding NL's industrial capabilities. As such, the Project will make an important contribution to achieving the Province's goals of creating a globally competitive industry that is sustainable by increasing the supply and service sector capabilities; utilizing and building on the competent, technical, agile and professional local workforce; recognizing the value of gender equity, diversity, and inclusivity to increasing the participation of underrepresented groups; supporting technology development, industry growth, and digitalization.

The R&D/E&T investment associated with the Project will be developed with several priorities including: local content, benefit to society, technological needs for the Project, alignment with the C-NLOER guidelines, and Equinor's global technology strategy.

For more information, please see the Project Benefits Plan (Equinor 2026).

The Project's investment in digitalization related to robotics, drones, artificial intelligence, and machine learning will contribute to grow supply chains and competencies in this future-focused global field. For example, Equinor is strengthening additive manufacturing capacity in NL with the intention of creating a local digital warehouse of spare parts, creating new jobs and areas of expertise and boosting the local economy. It's anticipated that these technologies and innovations will help advance other industries.

¹ The C-NLOER was formerly the Canada-Newfoundland and Labour Offshore Petroleum Board (C-NLOPB) but changed its formal name in June 2025. As such, some of the documents referenced are under their former name.



Consistent with the *Accord Acts* requirement, before any work or activity is authorized in the Canada-NL offshore area, Equinor will submit a Canada-NL Benefits Plan to the C-NLOER for review and approval. This Plan will identify and describe the measures that will be taken regarding the employment of residents of NL, and other Canadians, further increasing local skills, capabilities, and experience. The Plan will also indicate how Equinor will seek to ensure that manufacturers, consultants, contractors and service companies in NL have a full and fair opportunity to participate on a competitive basis in the supply of goods and services, further expanding the Province's global supply and service sector. The resultant direct employment will generate further indirect and induced employment and income benefits within NL. Overall, the Project will make a major contribution to NL's GDP, expenditures, and employment (Section 6.1).

Equinor's Diversity and Inclusion Plan has been integrated into the Project Benefits Plan (Equinor 2026). Equinor's corporate long-term diversity goals include strengthening the diversity of its leadership and talent pipeline as well as building on its inclusive working environment. The corporate 2025 ambition is that all teams will be diverse and inclusive by meeting targets set forth in the business area key performance indicator. Equinor will build on past success, and pursue these goals, within the Project.

Throughout its operations phase, the Project will also contribute to energy diversity and supply and contribute substantial revenues to the Government of NL through corporate tax and royalty payments. The Project will extend the life of the offshore petroleum industry in NL, representing an important next step in the development of its sustainability.



2 Assessment Scope

2.1 Geographic Scope

The SEIS assesses the effects of the Project on the NL economy, because it will experience socio-economic effects through Project expenditures, employment, and taxes and royalties. These effects, which are of broad public interest, are assessed based on a macroeconomic analysis which describes the direct, indirect and induced effects of Project expenditures.

At the sub-provincial level, the St. John's Impact Area (the St. John's Census Metropolitan Area) will experience effects from both development and operations phase activities, because it will be the location of operations management, supply and support activity, and it contains yards that could see fabrication activity.

The Potential Impact Areas that see construction/fabrication work will only experience development phase effects. As discussed in Section 2.1, Project components will be constructed at existing yards depending on capacity and fabrication requirements, and in compliance with the Framework Agreement. At the time of writing the SEIS, Project fabrication contracts had not yet been awarded and hence the location of construction/fabrication work had not been finalized. Consistent with Project planning and the Framework Agreement, this assessment assumes that one yard will be responsible for building a majority of the components of the subsea infrastructure over an estimated four-year period. It is estimated that tie-backs associated with future Project phases related to known discoveries would result in a total minimum construction period of eight years. Two yards, at Bull Arm (on the Isthmus of Avalon) and Cow Head (Marystown), can accommodate such an amount of work. This assessment also assumes that a proportion of the fabrication work will go to smaller NL yards.

Newfoundland and Labrador has many yards capable of undertaking such fabrication work (Table 2-1; Figure 2-1).



Table 2-1 Fabrication Facilities Under Consideration

Potential Impact Area	Fabrication Facility	Capacity/Attributes
St. John's	Newdock	72,800 m ² of space on waterfront with a 6,550 m ² manufacturing area and a 4,000 tonne marine elevator
	Bay Bulls Marine Terminal	16,000 m ² of waterfront property with 56,000 m ² of laydown area
	DFB Fabrication	260 m ² fabrication facility with 20,000 m ² of laydown space
	Cahill	Two facilities: Cahill Industrial Service Facility in Mount Pearl has 325 m ² of indoor fabrication space and 2,090 m ² of laydown area; and Cahill Fabrication Mechanical in St. John's has 3,350 m ² of indoor fabrication and 12,100 m ² of laydown area
	C&W Offshore	Three facilities: Mount Pearl has 950 m ² of production space and 3,000 m ² of laydown space; Bay Bulls has 2,000 m ² of production space and 4,500 m ² of laydown space; and Southern Harbour has 400 m ² building and almost 10,000 m ² of laydown space
	RothLochston	Paradise facility has a 1,200 m ² general fabrication plant with 800 m ² of office space, a 45,000 m ² of laydown area and a 2,000 m ² pipe fabrication plant
	Compass Ltd.	465 m ² fabrication facility and a smaller scale support building
Isthmus of Avalon	Bull Arm	25,000,000 m ² with three key project areas: marine facility, fabrication yard, and deepwater site; also includes ancillary facilities, over 20,600 m ² of enclosed fabrication facilities and more than 500 m of wharfage
	Ameil Constructors	1,100 m ² fabrication shop and 5,200 m ² of laydown area
Marystown	Cow Head	81,000 m ² including a 14,000 m ² fabrication space and a 3,360 m ² assembly bay
	Marystown Shipyard	Total area of 60,000 m ² and a total covered fabrication space of 9,400 m ² as well as 330 m of water frontage
Argentia	Port of Argentia	Northside Industrial Park, adjacent to the port and dock lands includes over 4,000,000 m ² of flat land; and Southside Industrial Park is a 4,000,000 m ² site
	Cahill	Cahill Fabrication Structural facility has 4,000 m ² of indoor fabrication space and a laydown area of 30,000 m ²
Stephenville	Port of Stephenville	7,500 m ² of paved dock area and 9,300 m ² warehouse building
Port aux Basques	Port aux Basques Industrial Facility	68,800 m ² with 460 m of ocean frontage, a 4,600 m ² building, and a 7,500 m ² warehouse with 10 offices

For the purposes of this SEIS, and consistent with past offshore petroleum project SEISs, the assessment of the potential effects of this work focuses on the St. John's Impact Area and Potential Impact Areas that extend a 50 km commuting distance around each of the fabrication facilities under consideration. Figure 2-1 to Figure 2-7 define the St. John's Impact Area and Potential Impact Areas for the above facilities.



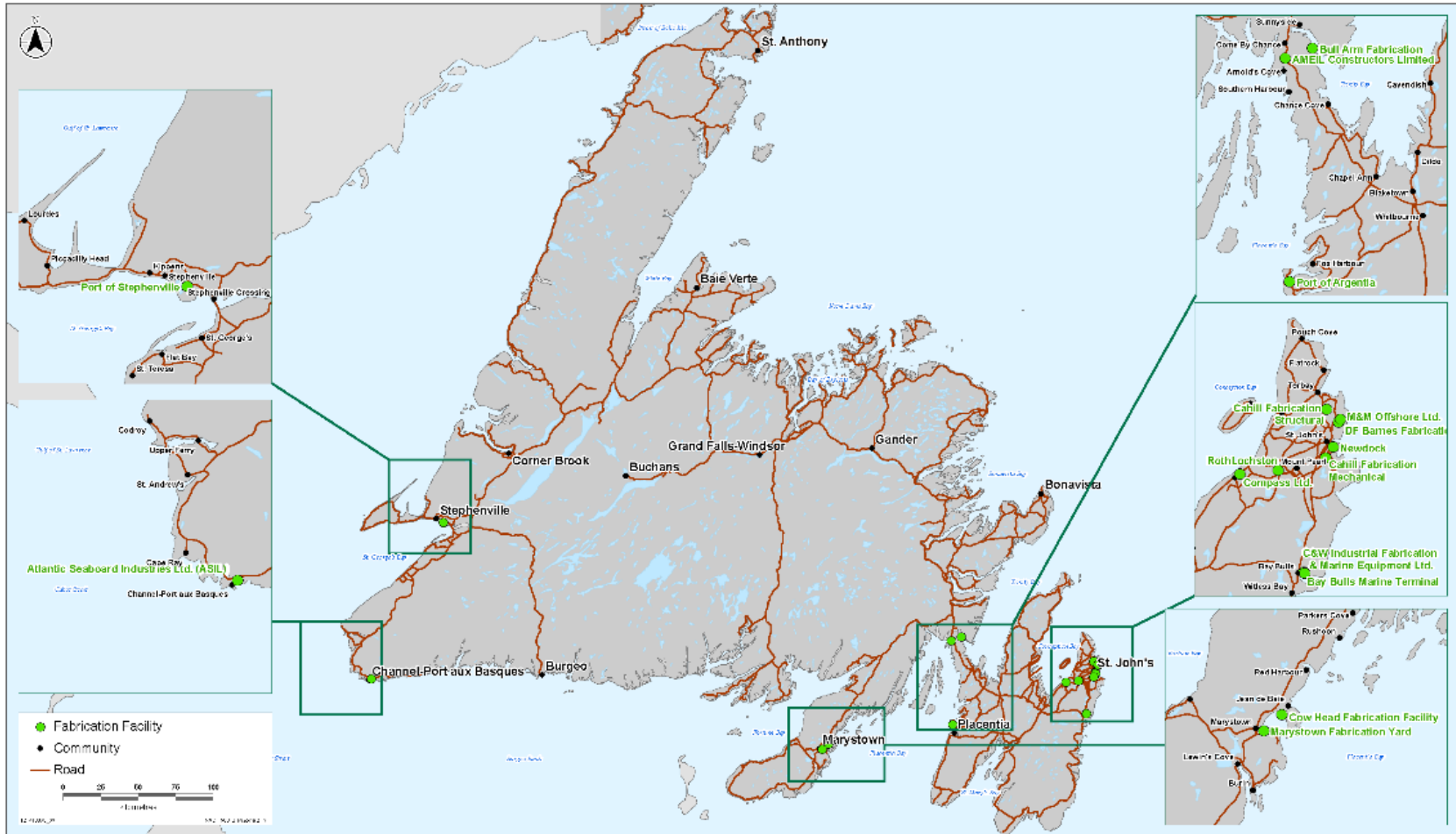


Figure 2-1 Fabrication Facilities in Newfoundland²

² Sources: Base Data - Natural Earth; Thematic Data – ERBC



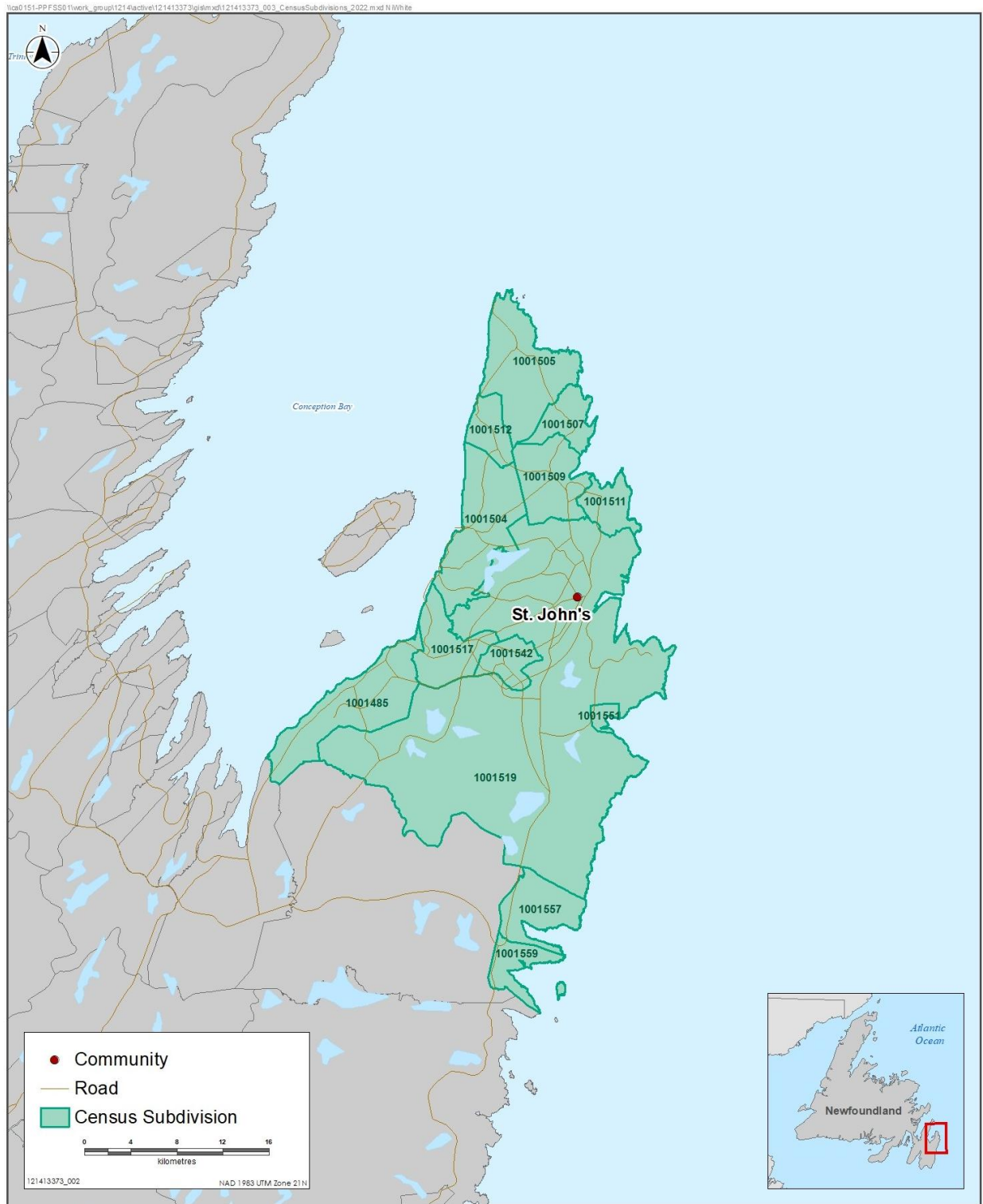


Figure 2-2 St. John's Area²



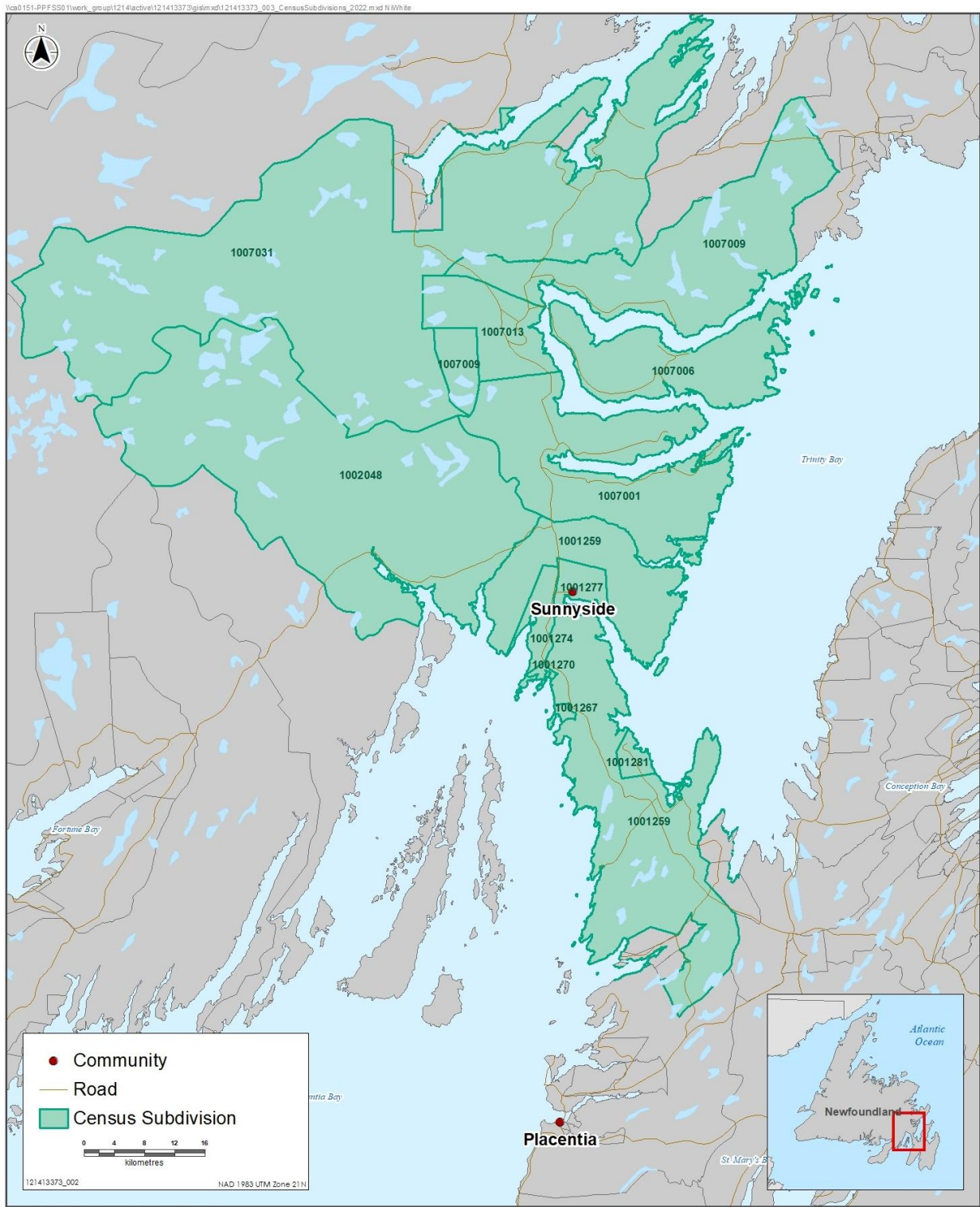


Figure 2-3 Isthmus of Avalon Area²





Figure 2-4 Marystown Area²



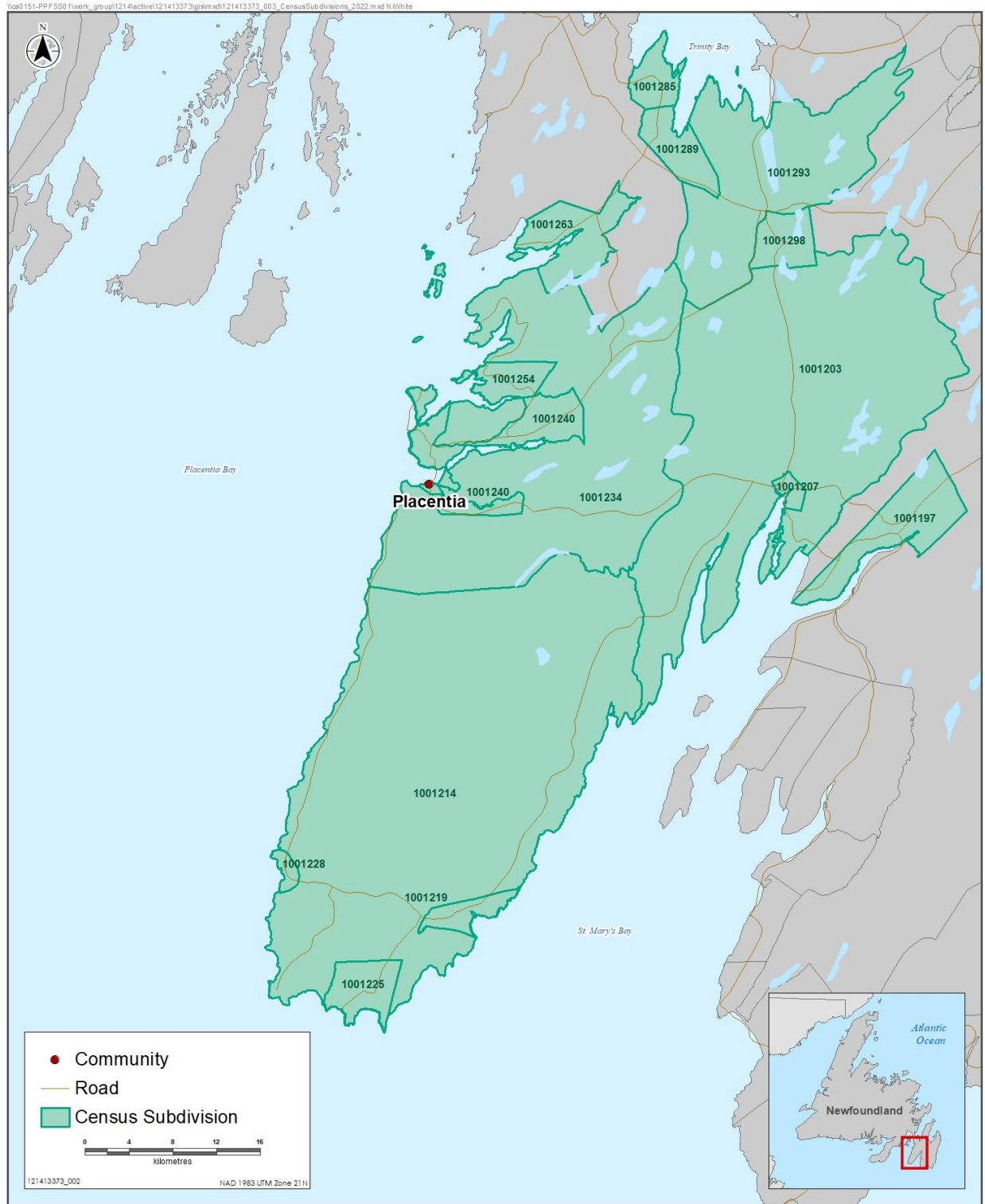


Figure 2-5 Placentia Area²





Figure 2-6 Stephenville Area²





Figure 2-7 Port aux Basques Area²



3 Assessment Methods

3.1 Assessment Approach

The main objective of a SEIS is to provide an assessment that complies with the requirements of the Accord Acts and considers regulatory guidance. The assessment approach adopted for this SEIS also aims to promote regulatory efficiency in offshore projects, by providing a focused assessment based on the scoping of issues to identify those elements of the socio-economic environment which are most likely to be affected by oil and gas activity.

Consistent with Equinor's sustainability priorities, the SEIS assesses the Project's contribution to socio-economic sustainable development. It also aligns with the Province's goal of creating industry that recognizes the value of diversity, equity and inclusion, and the innovation and strength that comes with inclusivity and increasing the participation of under-represented groups. This SEIS does this through Gender-Based Analysis Plus (GBA+)³, using baseline information on and of relevance to different disadvantaged socio-economic groups and sub-groups, and through consultation with organizations representing a wide range of such groups. This information and these consultations have also contributed to the Project Diversity and Inclusion Plan, an important effects management initiative.

3.2 Valued Components

The components of the environment that are valued by society, interpreted in its broadest sense to include the socio-economic, cultural, and biophysical environments, are the recommended focus of an assessment. These are referred to as VCs. This SEIS examines two VCs which have been used in assessing previous offshore petroleum projects in NL and which represent the socio-economic issues that have typically been of the greatest public interest:

- Economy, Employment and Business; and
- Community and Regional Infrastructure and Services.

3.2.1 Economy, Employment and Business

The effects on the economy of NL are mostly assessed based on a macroeconomic analysis which describes the direct, indirect and induced effects of Project expenditures. The provincial tax and royalty effects of the Project are also estimated.

³ Gender-Based Analysis Plus is an intersectional analysis that goes beyond biological (sex) and socio-cultural (gender) differences to consider other factors, such as age, disability, education, ethnicity, economic status, geography (including rurality), language, race, religion, and sexual orientation



Potential effects on Economy, Employment and Business associated with the Project derive from changes in demand for labour and Project expenditures on goods and services, as well as GDP and income effects. These can result in both beneficial and adverse effects, with the latter including labour shortages and wage inflation.

3.2.2 Community and Regional Infrastructure and Services

This assessment examines the effects on community and regional infrastructure and services. As noted above, the basis in each case will be the capacity of existing or planned infrastructure and services to handle Project-related demand, taking into account Project-specific effects management initiatives.

Demand for services and infrastructure is affected by changes in population and demographics. Project-related population growth could change the level of demand on local and regional services and infrastructure as a result of the presence of non-local fabrication workers. At peak, it is estimated that up to 500 workers will be required at a single fabrication location, and many will not be local residents. The presence of such non-local workers in communities during the fabrication period could increase the demand for community services and infrastructure, such as housing and other accommodations, water, sewer, waste, healthcare, transportation, and emergency services.

Project-related activities during construction and operations could also place increased demands on community services and infrastructure. For example, the transportation of Project goods, services and workers would use existing transportation infrastructure.

3.3 Issues Scoping

Issues scoping is used to focus the assessment on those issues identified as being of concern by regulatory agencies, technical experts, the public, and Indigenous groups. The focus (or scope) of an environmental assessment must be identified early in the environmental assessment process. The scope of the project to be assessed and the scope of factors to be considered are important for conducting an effective and efficient environmental impact assessment (CEAA 1998). This approach was used to develop issues scoping for the SEIS.

The issues scoping process for this SEIS involved:

- Documenting existing socio-economic conditions;
- Interviews with municipal officials and other key informants (see list in Appendix A – Key Informants);
- Reviewing previous assessments and other literature on offshore petroleum projects and other major projects; and
- Professional judgment based on the particular characteristics of the Project.



3.3.1 Documenting Existing Conditions

Data on the existing socio-economic conditions of the Province, St. John's Impact Area and Potential Impact Areas were collected to provide context for the SEIS. Effort was focused on collecting data that make a meaningful contribution to the assessment. This included, for example, collecting data not simply on relevant infrastructure and services, but also on their current and planned capacity and hence ability to absorb any additional Project-related demand.

A wide range of secondary sources was consulted for the collection of these baseline data, including:

- Statistics Canada and other federal agencies and departments;
- NL Statistics Agency and the Community Accounts database, as well as other appropriate provincial agencies and departments; and
- Municipal governments and local and regional authorities and boards. Specifically, the following information was collected:
 - Demographic data, including total population, population change, gender, and age;
 - Economy, employment and business information, including on the GDP, labour force characteristics, incomes, industries and businesses; and
 - Community infrastructure and services, including housing and accommodations, transportation, utilities, education, and health and emergency infrastructure and services.

Where possible, information was disaggregated by male, female, male Indigenous, and female Indigenous as input to the GBA+ analysis.

In May 2023, following changing market conditions and subsequent high-cost inflation, Equinor and its partner BP postponed the Bay du Nord development project up to three years. The pandemic affected the economy of NL and the selected impact areas, including labour market indicators and housing market conditions. The data that have been collected to update the SEIS reflect the conditions of the Province during the process of economic recovery and this should be considered when reading the existing conditions section. With respect to Statistics Canada data, the most recent Census of the population was completed in 2021 and the results have been incorporated into the SEIS.

The COVID-19 pandemic also revealed healthcare staffing challenges across the country, including NL (McCann 2023). As a result of the staffing shortages, some emergency rooms throughout the Province were temporarily closed. In 2022, for example, Central and Eastern Health announced temporary closures of emergency services in Whitbourne, St. Lawrence, and New-Wes-Valley (Lee 2022). While the provincial government has announced plans to improve access to health services, it is understood that the Project will contribute to demands on a health care system that is currently operating beyond its capacity, regardless of which Potential Impact Area sees the Project-related activity.



In addition, the southwest coast of Newfoundland, including the Port aux Basques area, experienced damage to infrastructure as a result of Hurricane Fiona in September 2022. Flooding caused road washouts and Port aux Basques is estimated to have had more than 100 homes severely damaged (Ping 2022; Ward and Roberts 2022). Some of the residents who lost their homes have bought new homes in Port aux Basques with the help of government disaster aid and donations, and some have moved away. A new subdivision is planned to replace lost homes, and the Town has received funds from the Canada Mortgage and Housing Corporation's Housing Accelerator Fund (CMHC 2024; Mullin 2023).

3.3.2 Key Informant Consultations

In-person and telephone interviews with municipal officials and others knowledgeable of the supply/demand situation with respect to socio-economic topics (Appendix A – Key Informants) helped identify any topics of concern. The information collected during these interviews is incorporated into the existing conditions for the St. John's Impact Area and each of the Potential Impact Areas.

In addition to key informant consultations, the SEIS considers the results of other Equinor engagement with the public for the Project. Equinor representatives engaged in several facility tours across NL in order to explore fabrication capabilities and held meetings with representatives for Sunnyside, Arnold's Cove, Come by Chance, Clarenville, Stephenville, Marystown, Argentia, Bull Arm and Placentia.

During each interview, key informants were provided with general information about the Project, including its size, the timing of Project activities, and labour force expectations during construction and operations. Interviewees were asked if they observed adverse effects on the local economy, employment and business or relevant infrastructure and services as a result of past projects. They were then asked if they could foresee any such issues that may be created by Project development and operations phase activity on Potential Impact Area. In the case of consultations with respect to Potential Impact Areas other than St. John's, it was made clear that the potential involvement of the area in the Project is dependent on the competitive award of fabrication work.

In order to gain knowledge about potential effects of the Project on diverse groups as part of the GBA+ analysis, specific questions (Appendix B – Diversity Questions) were asked of participants in consultations that were held as input to the Diversity and Inclusion Plan. The participants were members of provincial organizations representing the interests of women, persons with disabilities, members of visible minorities and members of the 2SLGBTQI+⁴ community (Appendix B.1). Given the spatial distribution of these organizations' offices, most GBA+ consultations occurred in St. John's. However, the consultations explicitly also sought to understand the experiences and circumstances of non-St. John's residents.

⁴ 2SLGBTQI+ is the acronym used by the Government of Canada to refer to the Canadian community. 2S: at the front, recognizes Two-Spirit people as the first 2SLGBTQI+ communities; L: Lesbian; G: Gay; B: Bisexual; T: Transgender; Q: Queer; I: Intersex, considers sex characteristics beyond sexual orientation, gender identity and gender expression; +: is inclusive of people who identify as part of sexual and gender diverse communities, who use additional terminologies.



3.3.3 Review of Literature on the Effects of Other Projects

An examination of the literature (including socio-economic environmental assessments, monitoring reports, newspaper and magazine articles and academic publications) on other generally comparable projects, including prior NL offshore petroleum projects, provided an understanding of their effects, and hence the potential effects of the Project.

3.3.3.1 Establish Scope of Assessment

The information collected from the above sources was used to identify socio-economic issues and concerns of a size and importance to warrant a fuller assessment, and the impact areas in which they might occur. An important consideration in identifying these 'scoped-in' topics was whether the existing or expected capacity of the socio-economic component (e.g., the labour force or health care infrastructure and services), after any Project-specific effects management, could handle additional demand resulting from the Project.



4 Results of Issues Scoping

There is limited literature on the effects that offshore petroleum projects and activity have had in NL, but a series of reports prepared most recently for Energy Research & Innovation Newfoundland & Labrador (ERINL) indicates that the benefits to the Province as a whole have been large, widely distributed, and long-term, and that the industry has made, and will continue to make, a very important contribution to the economy and society of NL. For example, on average over the 2018-2024 period, it was responsible for 23.3% of the provincial GDP, 19,000 person-years full time equivalents (8.2% of the provincial total), and 10.8% of labour income (Stantec Consulting Ltd. 2025). In addition to building the provincial economy, offshore petroleum projects and activity have contributed to infrastructure development, supported R&D, and grown the local supply and service sector, resulting in diversification of the economy (Stantec Consulting Ltd. 2025).

Post-Covid pandemic, the Province has seen a decrease from previous years in both bids for exploration parcels as well as exploration drilling activity but returns to production in its offshore projects (NLDF 2024 2025). Activity increased in 2022 when construction of West White Rose resumed. In 2024, oil production increased, driven by the return of the upgraded Terra Nova FPSO to full operation, though this was somewhat counterbalanced by a temporary shutdown of the White Rose project for a similar asset life extension upgrade of the SeaRose FPSO (NLDF 2025).

With respect to adverse socio-economic effects of offshore petroleum activity, many of the concerns that were raised in the 1980s have since been shown to be of minor significance to the public and the regulators. For example, concerns about increased crime and demands for local services were largely proven to be unjustified over the course of the construction and operations of the Hibernia, Terra Nova, White Rose and Hebron projects (Stantec Consulting Ltd. and Keith Storey Consulting 2011), and no such problems have resulted to date from construction phase of the West White Rose project.

Considering this experience, there is currently little concern about the ability of communities and municipal governments to deal with offshore-related projects. Experience has demonstrated that they are able to do so, and municipalities appear to be well prepared to deal with future projects. Not only has there been a reduction in public concern, but past project socio-economic assessments have indicated, and subsequent events confirmed, that with appropriate management strategies in place, the effects of oilfield development projects are almost entirely positive (Stantec Consulting Ltd. and Keith Storey Consulting 2011). An August 2019 opinion poll undertaken by Narrative Research found that 86% of Newfoundlanders and Labradorians support offshore petroleum development (NOIA 2019).

The rest of this section of the SEIS describes the current baseline conditions in the St. John's Impact Area, which would be the location of development and operations phase-related Project activity, and each of the Potential Impact Areas. This section provides information from the literature and consultations about the potential effects of the Project, as well as an overview assessment of whether the potential adverse and positive socio-economic effects on each area warrant a full assessment.



Potential Impact Areas are the home of facilities that could be awarded fabrication activity. It should again be stressed that the location of any such Project activity will be dependent on the competitive award of Project contracts.

4.1 St. John's Area

As was noted above, the St. John's Area (Census Metropolitan Area) will experience effects from both development and operations phase activities. It has been the centre of offshore oil management, administration, E&T, R&D and logistical support (including marine vessels and helicopters), but it also contains facilities that could see fabrication activity.

The two largest potential fabrication facilities in the St. John's Area are Newdock and the Bay Bulls Marine Terminal (Table 2-1). Four piers further complement these dry-docking capabilities. Newdock has offshore experience with the fabrication and assembly of subsea templates and manifolds, including work completed for the Terra Nova project and various international offshore projects.

Bay Bulls Marine Terminal is an International Ship and Port Facility Security-certified terminal in Bay Bulls, which has been developed as an offshore support centre. It has a 90 m finger wharf, water access with 11 m water depth, a laydown area consisting of nine acres of open storage area and 790 m² of warehouse space. It provides stevedoring, cargo marshalling, drill rig repair and shipyard services to the offshore oil and gas and general marine cargo industries.

4.1.1 Demography and Economy

In 2021, the population of the St. John's Area was 212,580, an increase of 2.0% from 2016. Women comprised 51.3% of the 2021 population and men represented 48.7% (Table 4-1). The total labour force of the St. John's Area in 2021 was 112,880 of whom 50.5% were men and 49.5% were women. The unemployment rate among men was higher at 12.7% than the unemployment rate for the total population (10.7%) in 2021. The average total income in 2020 was \$56,300. For men, the average total income was \$64,300 and for women it was \$48,800 (Statistics Canada 2022).

During the same timeframe, the Indigenous population in the area is 6,985 individuals, consisting of 47.4% men and 53.1% women (Table 4-2). Of this population, 79.9% of the total Indigenous population are aged 15 years and older, considered of working age (Statistics Canada 2022). Indigenous persons comprised 3.3% of the labour force, of which a slight majority (53.5%) were women. Similar to the total population, the unemployment rate is higher among men (10.2%) compared to women (9.3%).



Table 4-1 Total Population and Labour Force, St. John's area, 2021

	Total	Men+	Women+
Population	212,580	103,480	109,100
Population aged 15 years+	181,010	87,280	93,730
Labour force	112,880	57,030	55,850
Participation rate (%)	63.7	66.8	60.8
Employed	100,790	49,805	50,980
Unemployed	12,095	7,225	4,870
Unemployment rate (%)	10.7	12.7	8.7

Notes:

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2019) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables

Source: Statistics Canada 2022

Table 4-2 Indigenous Population and Labour Force, St. John's area, 2021

	Total	Men+	Women+
Population	6,985	3,310	3,705
Population aged 15 years+	5,585	2,500	3,070
Labour force	4,010	1,830	2,190
Participation rate (%)	71.8	73.2	71.3
Employed	3,455	1,560	1,895
Unemployed	550	255	285
Unemployment rate (%)	9.8	10.2	9.3

Notes:

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2019) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables

2021 'Total Population' and 'Indigenous Populations' data from 2021 Census of the Population – Census Profile.

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2022) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables.

Source: Statistics Canada 2022

In 2021, 26.5% of the St. John's Area's labour force worked in sales and service occupations (Figure 4-1). Another 17.6% worked in business, finance and administration, 15.2% of the labour force worked in trades, transport, equipment operators and related occupations, and 14.1% worked in education, law and social, community and government services. Occupations with the highest representation from women in the St. John's Area were sales and service (28.7%), while the greatest percentage of men worked in trades, transport, equipment operators and related occupations (30.0%).



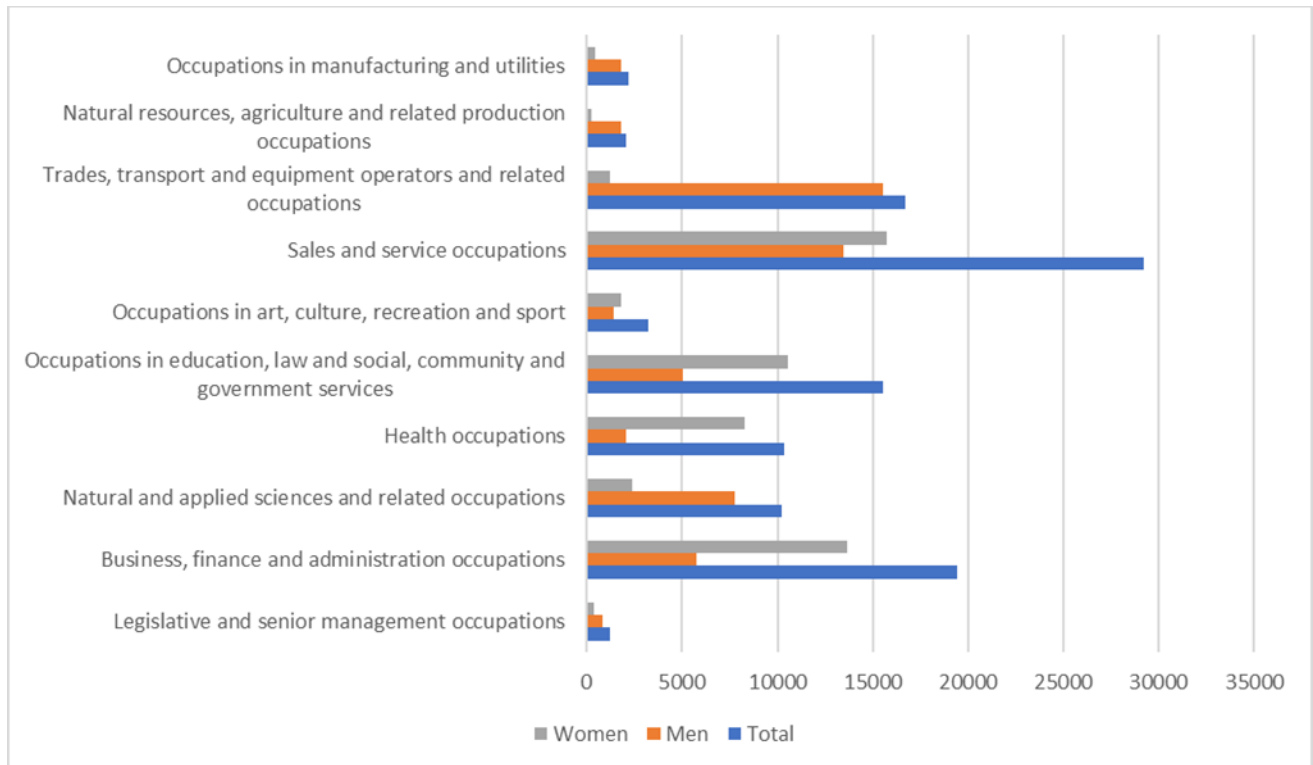


Figure 4-1 Occupation by Gender, St. John’s Area, 2021

4.1.2 Housing and Temporary Accommodations

In 2024, NL’s housing stock saw significant growth as interest rates fell and demand for housing increased. There were 1,672 housing starts in the Province in 2024, an increase of 71.9% over the previous year. Between 2023 and 2024, the number of residential properties sold in the Province through MLS increased by 6.1% to 5,686 units, and the average price increased by 8.9%, from \$292,403 in 2023 to \$319,634 in 2024 (NLDF 2025).

The number of occupied dwellings in the St. John’s Area in 2021 was approximately 90,000 (Statistics Canada 2022). The St. John’s Area is NL’s largest housing market, accounting for approximately 80% of MLS residential sales and approximately 55% of NL housing starts. Between 2023 and 2024, housing starts in the St. John’s Area increased 78.5%, from 488 to 871 units (NLDF 2025).

The vacancy rate decreased in the Province from 3.1% in 2021 to 1.5 % in 2023. It increased slightly in 2024 to 1.8%. In the St. John’s area, the vacancy rate for apartments was 2.1% in 2024, an increase of 0.6% compared to 2023. The average monthly rent for a two-bedroom apartment in St. John’s increased from \$974 in 2020 to \$1,026 in 2024 (NLDF 2025). Increased in-migration and a declining inventory of homes for sale contributed to the increase in demand for rental properties (NLDF 2025).



Studies show that past projects, including the Hibernia, Terra Nova, White Rose, and Hebron projects had no notable adverse effect on the St. John's Area housing market (Stantec Consulting Ltd. and Keith Storey Consulting 2011; Storey et al. 1996). The Hibernia project had a minor effect in that most of the onshore managerial, administrative, and support personnel lived in rental and leased accommodations in St. John's within easy access of their workplace. Many offshore personnel already lived within the St. John's Area and did not need to purchase or rent accommodation. The local housing market was able to meet the needs of Hibernia employees without difficulty and upon project completion a number of rental units were made available and the vacancy rate increased (Stantec Consulting Ltd. and Keith Storey Consulting 2011; Storey et al. 1996).

Regarding the potential effects of the Project, it may create some demand for housing. The Project labour force may exert pressure on the St. John's Area's already depleted housing inventory and create additional demand for new-build housing. In recent years, the existing home market has been undersupplied – each month approximately 50% of active listings sell, meaning approximately 50% of listings are carried into the next month – and it would take three to four months to run out of available homes without having to build new ones (Janes, pers. comm.).

There are approximately 70 hotels, motels, inns, and bed-and-breakfasts, with more than 3,000 rooms, in the St. John's Area. The majority of these are located in the City of St. John's (NLT 2022). A number of new hotels have been completed in the last several years, including the Hilton Garden Inn, Sandman Signature Hotel, and some boutique hotels in the downtown. An expansion to the existing JAG hotel, consisting of 85 additional hotel rooms was completed in 2025 and an 86-unit hotel on New Gower is being planned (Advantage St. John's 2022; Steele Hotels 2025).

Between 2019 and 2021, the occupancy rate for roofed accommodations on the Avalon Peninsula dropped from 52.2% to 35.5%, as a result of COVID-19 related travel restrictions (NLTCAR 2021). However, by 2023, the occupancy rate on the Avalon Peninsula increased to 67.0 % and then fell to 59.5% in 2024 (NLTCAR 2024).

4.1.3 Ports and Airports

St. John's Harbour is administered by the St. John's Port Authority (SJPA). It is the primary offshore petroleum industry supply and service centre on Canada's east coast, one of the largest fish-handling ports in NL, a popular international cruise ship destination, and the Province's primary container terminal (SJPA 2019).

The A. Harvey & Co. wharf (Piers 12, 14 east and west, 15 and 16) has been the base for all offshore petroleum shore-based marine services since 1997. The company has had long-term agreements to service offshore activity for Hibernia, Terra Nova, White Rose, and Hebron. An expansion of Pier 17 west, completed in July 2018, has reduced wait times for vessels seeking to berth and increased efficiency in the Port as it evolves to meet future demands (SJPA 2019).

Bay Bulls Marine Terminal, located approximately 32 km south of St. John's Harbour, is an International Ship and Port Security (ISPS)-certified facility.



The St. John's International Airport, the busiest commercial airport in the Province, is operated by the St. John's International Airport Authority Inc. (SJIAA). It serves scheduled national and international passenger, charter and cargo traffic. Carriers using the airport include Air Canada, Provincial Airlines, WestJet, Porter Airlines, Air Transat, and Air Saint-Pierre.

Passenger traffic in 2017 was 1.53 million and decreased 1.7% to 1.51 million in 2018. While this was a decrease, levels are the fourth highest on record, only surpassed in 2017, 2016, and 2014 (City of St. John's 2018; NLTCII). While passenger traffic has been predicted to reach 2.5 million per year by 2030 (SJIAA 2017) activity was significantly disrupted by the COVID-19 pandemic. As a result, provincially, airport activity reached 824,698 passenger movements in 2021, an increase of 32% compared to 2020 but still 63% below 2019. In 2024, SJIAA served more than 1.38 million passengers, with every month seeing a year-over-year increase from 2023 (SJIAA 2024).

The airport's current facilities can handle present volumes, and plans have been made to accommodate increased traffic when needed. Over the last several years, the SJIAA has invested \$270 million in infrastructure and capital improvements. The largest project in the 10-Year Airport Improvement and Expansion Plan is the expansion of the Airport Terminal Building. This was conducted in two phases, and more than doubled the building's existing size to total approximately 39,000 m² by 2022 (SJIAA 2017). In 2024, construction was completed on the airport's second runway, two new passenger bridges were installed and a multi-year, multi-phase parking lot improvement project was initiated (SJIAA 2024).

4.1.4 Utilities

The Regional Water System in the St. John's Area is owned and operated by the City of St. John's. The system's three water treatment plants - Windsor Lake, Petty Harbour Long Pond, and Bay Bulls Big Pond - have a total summer capacity of 169,500 m³/d and a total winter capacity of 159,000 m³/d.

In March 2025, a federal investment of over \$26.8 million was announced to build a water supply, treatment and distribution system in the Town of Torbay.

The Riverhead Wastewater Treatment Facility is a conventional primary treatment plant designed to treat wastewater from the City of St. John's, the City of Mount Pearl, and the Town of Paradise. The estimated wastewater production from this region's residential, commercial and light industrial sources is 135 ML/d. The City's water, sewer, and waste systems have additional capacity and are able to absorb any additional demand created by the Project (City of St. John's 2022; Niblock, pers. comm.; O'Brien, pers. comm.).

The Robin Hood Bay Waste Management Facility is the landfill for the St. John's Area. When it was opened in 2010 it had an estimated lifespan of 40-years and this may be increased with greater waste diversion efforts. The City is well-prepared for growth and has indicated that it welcomes further industrial, commercial and residential development (Niblock, pers. comm.; O'Brien, pers. comm.).



4.1.5 Education

NL Schools is an entity of the Government of NL that manages education of all English-speaking students and public schools, kindergarten to grade 12 (K-12), in the Province. It operates three district offices: Western, Central, and Avalon (NL Schools 2025). The Government of NL provides education statistics, including school numbers and enrolment, by region: Avalon, Central, Western, and Labrador. The St. John's Area falls in the Avalon region where the number of schools has remained at 91 since 2021-22. The number of K-12 students in the Avalon region increased from 35,637 in 2023-24 to 35,912 in 2024-25. In the St. John's Area, there are 61 schools with approximately 30,000 students (NLEECD 2025).

The Conseil scolaire francophone provincial de Terre-Neuve-et-Labrador offers French-language education in NL. In 2024-25, 395 students were enrolled at six Conseil scolaire francophone schools, two of which are in St. John's (NLEECD 2025).

New students associated with the workforces of past resource development projects, including Hebron, did not significantly increase demands on schools. During the Hebron construction phase, Holy Heart was the only school offering semesterization, and it received a number of new Hebron-related students from schools in other jurisdictions that had semesterization, and that was the students' preference. More schools are now offering that format, providing more options for incoming students.

Based on the number of schools in the St. John's Area and the assumption that any additional development or operations phase workforce would be spread throughout the area, and therefore across a number of schools and grades from K-12, there is more than sufficient capacity at the existing schools. In addition, a new junior high with capacity for 800 students and an enrolment of approximately 600 was completed in Paradise in 2021 (W. Hardy, pers. comm.). A kindergarten to Grade 7 school, being constructed in Kenmount Terrace with space for 860 students, is expected to be complete in 2026. Two other new high schools are planned for Paradise and St. Phillip's (NLTI 2025).

Post-secondary education and training in the St John's Area is provided through Memorial University of Newfoundland (Memorial), the College of the North Atlantic (CNA), and 11 private training institutions. The number of undergraduate students enrolled at Memorial's St. John's campus decreased from 10,458 in 2011 to 10,080 in 2020. By 2024, total undergraduate enrollment at Memorial's St. John's campus was 10,936. Graduate enrolment grew from 3,039 to 3,693 between 2011 and 2022 and increased to 4,333 by 2024. Memorial's Marine Institute saw an increase in undergraduate students between 2011 and 2021, from 402 to 420 and then a decrease in 2024 to 344. The number of graduate students increased from 80 to 311 between 2011 and 2024 (CIAP 2024).

There are three CNA campuses in the St. John's Area: Prince Philip Parkway; Ridge Road; and Seal Cove. In fall 2024, the total full-time and part-time enrolment at all CNA campuses was 6,251 students (CNA 2024).

The development of NL's offshore petroleum industry has been accompanied by the development or enhancement of a range of E&T and R&D facilities at these St. John's region higher education institutions. New programs related to the oil and gas industry have been added to the offerings at Memorial, the Marine Institute and CNA (PRAC 2016, PRNL 2019, ERINL 2025).



4.1.6 Health and Emergency Services

Until April 2023, health services in the St. John's Area were provided by Eastern Health. It was the largest integrated health organization in NL, providing health services to a regional population of more than 300,000. In 2021, Eastern Health operated 14 hospitals and health centres with approximately 1,200 acute care, long-term care, rehabilitation, and mental health and addictions beds (Eastern Health 2021). In 2023, Eastern Health had 432 family medicine physicians, down from 437 in 2019. The number of specialists in the Eastern Region in 2023 was 550, up from 499 in 2019 (CIHI 2024).

In April 2023, all regional health authorities transitioned to NL Health Services, a single provincial health authority. The St. John's Area is now part of NL Health's Eastern-Urban health zone. The reorganization of the health care system is intended to streamline provincial programs and services to offer more efficient and effective health care delivery across NL. It includes the implementation of recruitment and retention strategies for health care professionals and physicians and the addition of virtual care services to expand capacity of primary and emergency health care delivery, as well as construction of the new Mental Health and Addictions Centre in St. John's, which opened in April 2025 (NLHS 2024). In addition, a new urgent- and ambulatory-care centre opened in St. John's in January 2026 with a second location expected later that year. The centres will treat patients with non-life-threatening injuries and illnesses and the expectation is that they will relieve pressure on emergency rooms and shorten hospital wait times (Howells 2025). They will also provide outpatient services, such as specialist clinics, ultrasound, X-ray, and audiology.

There is no evidence that the Hibernia, Terra Nova, White Rose or Hebron projects resulted in substantial new demands for health care services in the St. John's Area. The Province's health system is working at capacity; however, workers on oil and gas projects and their families are generally young and healthy and place few demands on medical facilities and services (R. Johnson, pers. comm.). This is likely to be the case with the Project. In addition, the offshore petroleum industry has prompted and supported new research and infrastructure associated with offshore health and safety, helping to reduce incidences of injury related to oil and gas activities.

Between 2010 and 2021, the Province's Crime Severity Index (CSI), which measures the severity of crime, decreased, as did that for St. John's. Between 2021 and 2024, the CSI for NL increased from 76.87 to 89.25 and for St. John's it increased from 66.52 to 76.95 (Statistics Canada 2025). Total criminal code violations decreased 40.7% in the Northeast Avalon between 2012 and 2021 but rose 15.5% between 2021 and 2023 (RNC 2021, 2024).

Policing in the St. John's Area is the responsibility of the Royal Newfoundland Constabulary (RNC). In 2023, the RNC Northeast Avalon had 329 officers, or 154.2 officers per 100,000 population. This is a decrease from the previous year when it had 337 officers and 157.9 officers per 100,000 population (Statistics Canada 2024b). The provincial budget 2025 includes funding for 10 new officers on the Northeast Avalon (GNL 2025a).

Fire protection services in the St. John's Area are provided by the St. John's Regional Fire Department. It operates seven fire stations, six of which are staffed by paid full-time firefighters 24 hours per day, with the other one operated by paid full-time firefighters for eight hours per day (Monday to Friday) and by



volunteers during evenings and weekends. In 2025, the St. John's Regional Fire Department had 208 staff, including 121 firefighters and 31 temporary firefighters (SJRF 2025). There is also a Volunteer Fire Department in the Goulds with 30 volunteer firefighters (City of St. John's 2019) and volunteer fire departments serving Pouch Cove, Torbay, Bell Island, Portugal Cove-St. Phillips, Witless Bay, and Logy Bay-Middle Cove-Outer Cove (D. Hamlyn, pers. comm.).

4.2 Isthmus of Avalon Area

The Bull Arm Fabrication Site on Trinity Bay on the Isthmus of Avalon is the largest industrial fabrication site in Atlantic Canada. It spans over 25 km² and includes a marine facility; fabrication yard; deepwater site, as well as ancillary facilities. In total there are over 20,600 m² of enclosed fabrication facilities and more than 500 m of wharfage. It was developed to build the Gravity-Based Structure (GBS) and assemble and install the topsides of Hibernia production platform and has subsequently been used for fabrication of topside modules and components for the Terra Nova and White Rose projects, and to build the GBS and provide living quarters assembly and topsides integration for the Hebron project. Together with the refinery at Come by Chance and the Newfoundland and Labrador Transshipment Terminal, the Isthmus has considerable and long-term familiarity with the construction and operation of a variety of aspects of the oil industry.

The Bull Arm Fabrication Site is close to the communities of Sunnyside, Arnold's Cove and Come By Chance. Research on the effects of the Hibernia project on these and other Isthmus of Avalon communities, including the nearest regional centre, Clarenville, indicated that fears or negative expectations about how it would affect regional and community infrastructure and services were never realized (Community Resource Services Ltd., 1996; 2003; Stantec Consulting Ltd. and Keith Storey Consulting 2011).

4.2.1 Demography and Economy

Between 2016 and 2021, the population of the Isthmus of Avalon Area decreased by 1.3%. In 2021, the population was 17,055, with women comprising 50.7% and men representing 49.3% of the total (Table 4-3). The Indigenous population of the Isthmus was 445 in 2021, representing 2.6% of the total. Women and men comprised 57.3% and 42.7% of the Indigenous population, respectively (Statistics Canada 2022).

The total labour force of the Isthmus of Avalon Area in 2021 was 7,705 of whom 51.1% were men and 49.9% were women. The unemployment rate among men in the Isthmus of Avalon Area was higher at 20.7% than the unemployment rate for the area as a whole (17.1%) in 2021. In 2020, the mean total income in the Area's residents was \$55,920 (Statistics Canada 2022).



Table 4-3 Total Population and Labour Force, Isthmus of Avalon Area, 2021

	Total	Men+	Women+
Population	17,055	8,415	8,640
Population aged 15 years+	14,975	7,330	7,645
Labour force	7,705	3,940	3,765
Participation rate (%)	51.5	53.8	49.2
Employed	6,345	3,090	3,255
Unemployed	1,320	815	505
Unemployment rate (%)	17.1	20.7	13.4

Notes:

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2019) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables

Source: Statistics Canada 2022

The Indigenous population in the Isthmus of Avalon is 500 individuals, consisting of 42.0% men and 51.0% women (Table 4-4). Of this total, 380 individuals (76.0% of the total Indigenous population) are aged 15 years and older, and considered of working age (Statistics Canada 2023). The Indigenous labour force comprises 155 men and 220 women. There are 20 unemployed Indigenous individuals, corresponding to an overall unemployment rate of 5.0%, which is equal amongst men and women (Statistics Canada 2022).

Table 4-4 Total Population and Labour Force, Isthmus of Avalon Area, 2021

	Total	Men+	Women+
Population	500	210	255
Population aged 15 years+	400	155	220
Labour force	235	75	100
Participation rate (%)	58.8	48.4	45.5
Employed	175	55	85
Unemployed	20	10	10
Unemployment rate (%)	5	6.5	4.5

Notes:

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2019) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables

2021 'Total Population' and 'Indigenous Populations' data from 2021 Census of the Population – Census Profile.

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Source: Statistics Canada 2022



In 2021, the main occupations in the Isthmus of Avalon Area were in sales and service (27.1%) and trades, transport, equipment operators and related (26.9%) (Figure 4-2). Approximately 13.3% of the Area’s labour force worked in education, law and social, community and government services and 11.0% in business, finance and administration occupations. Occupations with the highest representation from women were sales and service (38.8%), while most men worked in trades, transport, equipment operators and related (49.9%).

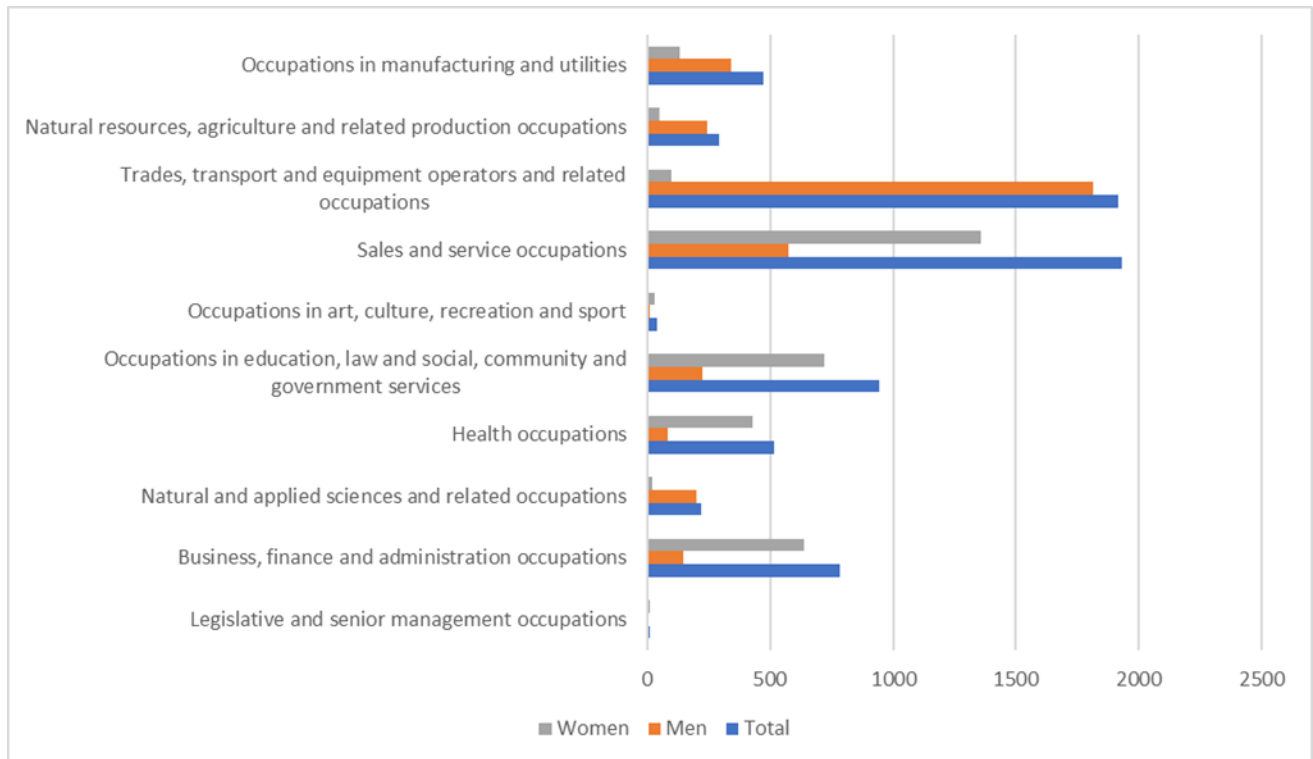


Figure 4-2 Occupation by Gender, Isthmus of Avalon Area, 2021

4.2.2 Housing and Temporary Accommodations

The number of occupied dwellings in the Isthmus of Avalon Area was 8,632 in 2021, up from 7,721 in 2016 (Statistics Canada 2017, 2022). The average housing price in Clarendville increased to \$264,000 in 2021 compared to \$259,828 in 2016 (Town of Clarendville 2023). The average monthly rent decreased, from \$876 to \$868 between 2016 and 2021 (Community Accounts 2018).

There are 13 hotels, motels, inns, and bed-and-breakfasts with approximately 300 rooms in the Isthmus of Avalon Area (NLT 2019). Most of these are in Clarendville. In 2024, the occupancy rate of roofed accommodations in the Eastern Region (where the majority of the Isthmus of Avalon Area lies, as well as the Placentia and Marystown Areas) was 41.4%, down 4% from 2023 (TCII 2018). As a result of COVID-19, the occupancy rate fell to 24.1% in 2020 but increased to 45.0% in 2023 (NLTCAR 2021; 2024).



Pre-project concerns about the ability of the Isthmus of Avalon Area communities to accommodate Hibernia construction workers were largely resolved through the provision of onsite accommodations. Some of the workforce did occupy housing in the Area, most of it leased. However, based on CHMC House Price Surveys and resident surveys, it was concluded that Hibernia-related demand had little effect on overall demand or house prices, and that any increases experienced were short-term (Jones 1998). Terra Nova and White Rose construction activity at Bull Arm was at a much smaller scale than Hibernia. Workers either commuted from their homes or found temporary local accommodations. The projects consequently had little or no effect on the local housing market. Hebron was a larger project but again had only limited effects on housing (Stantec Consulting Ltd. and Keith Storey Consulting 2011).

4.2.3 Utilities

Clarenville's water supply comes from the Shoal Harbour River. The water supply has capacity to supply the existing population and future demands. The plant supplies approximately 4,900 m³/d and is designed to allow future upgrades to increase the supply to up to approximately 16,000 m³/d to accommodate future growth of the community. The Town's wastewater system is able to serve the current population but several of the sewage pump stations need to be upgraded. The Town of Clarenville is considering options to upgrade the existing wastewater system (Plan-Tech Environment Ltd et al. n.d).

There is a waste recovery facility in Clarenville which accept residential bulk garbage at no charge, including appliances, tires, construction and demolition materials, vehicles and parts. A transfer station in Clarenville receives waste from the area, which is then transferred to the regional landfill at Robin Hood Bay in St. John's (Eastern Regional Service Board 2025).

4.2.4 Education

NL Schools operates four schools in the Isthmus of Avalon Area, which falls in the Central Education District. Between the 2023-2024 and 2024-2025 school years, the number of schools in the Central District of NL Schools where the decreased from 77 to 76 and enrolment fell from 13,464 to 13,261. In 2024-2025, there were 1,437 students attending K-12 in the Isthmus of Avalon Area (NLEECD 2025).

Post-secondary education and training is available through the CNA campus in Clarenville. Approximately 250 full-time, 50 part-time and 400 continuing education students register at this campus each year (CNA 2019).

4.2.5 Health and Emergency Services

The Dr. G. B. Cross Memorial Hospital in Clarenville serves the Isthmus of Avalon Area. It has 41 acute care beds, eight observation beds, one pediatric bed and four internal care unit beds. It also has a 28-bed medicine/surgery unit. The Dr. Albert O'Mahony Memorial Manor located in Clarenville is a long-term care home with 44 beds (Eastern Health, n.d.).



There are 22 uniformed Royal Canadian Mounted Police (RCMP) officers and three District Assistants that serve Clarenville and the surrounding area. This represents an officer-to-population ratio of approximately 1:1,227 (J. Little, pers. comm.). Between 2022 and 2023, the CSI for the Clarenville-Bonavista RCMP district decreased from 74.8 to 67.3 (Community Accounts 2024).

The Isthmus of Avalon Area is served by 16 volunteer fire departments with an average of approximately 23 firefighters. The Fire Department in Clarenville has a paid fire chief and 35 volunteer firefighters (C. Feltham, pers. comm.). Construction of Clarenville's new fire hall was completed at the Clarenville Town Hall in 2020 (Town of Clarenville 2021). The new fire hall has room for six fire trucks, including a new ladder truck, a lounge, and a storage area on the second floor (Parsons 2019).

4.3 Marystown Area

The Cow Head Fabrication Facility is located near Marystown on Mortier Bay on the Burin Peninsula. It has a land area of 265,750 m² with a 45,932 m² in-house fabrication facility. The facility has extensive experience in offshore fabrication and heavy industrial fabrication, including the 11,000-tonne SeaRose FPSO topsides, which employed more than 1,000 people. The Cow Head facilities were previously utilized by contractors involved in the Hibernia and Hebron projects, and more recently in the Noble Drilling semisubmersibles conversion program.

Once owned by Kiewit Offshore Services and recently purchased by Marbase, the Marystown Shipyard shipbuilding and repair facility covers a total area of 60,000 m² and has a total covered fabrication space of 9,400 m² as well as 330 m of water frontage. The combination of a syncrolift and side transfer system provides access to the sea with sufficient water depths and channel widths to accommodate vessel sizes up to 19.5 m beam and 80 m in length.

4.3.1 Demography and Economy

In 2021, the population of the Marystown Area was 14,810, a decrease of 4.1% from 2016. In 2021, women comprised 51.4% of the total population and men comprised 48.6% (Table 4-5).

The total labour force of the Marystown Area in 2021 was 6,565, of whom 51.4% were men and 48.6% women. The total unemployment rate of the Area was 18.0% in 2021 and the mean total income in 2020 was \$37,415 (Statistics Canada 2022).



Table 4-5 Total Population and Labour Force, Marystown Area, 2021

	Total	Men+	Women+
Population	14,810	7,255	7,555
Population aged 15 years+	12,265	5,945	6,320
Labour force	6,565	3,375	3,190
Participation rate (%)	50.2	53.1	47.5
Employed	5,350	2,580	2,770
Unemployed	1,180	795	385
Unemployment rate (%)	18.0	23.6	12.1

Notes:

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2019) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables

Source: Statistics Canada 2022

The Indigenous population in the Marystown area is 140 individuals, consisting of 53.6% men and 50.0% women (Table 4-6). Of this population, 125 individuals (89.3% of the total Indigenous population) are aged 15 years and older and are considered of working age (Statistics Canada 2023). This includes a 22.2% and 0% employment rate for men and women, respectively (Statistics Canada 2022).

Table 4-6 Indigenous Population and Labour Force, Marystown Area, 2021

	Total	Men+	Women+
Population	140	75	70
Population aged 15 years+	105	55	35
Labour force	65	20	25
Participation rate (%)	61.9	36.4	71.
Employed	45	10	0
Unemployed	15	0	10
Unemployment rate (%)	14.3	0	28.6

Notes:

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2019) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables

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Source: Statistics Canada 2022

In 2021, the occupations with the highest employment in the Marystown Area were trades, transport, equipment operators and related (23.4%), of which 94.4% of positions were held by men (Figure 4-3). Sales and service positions were occupied by 23.0 % of the labour force and the majority (65.0%) of these positions were held by women (Statistics Canada 2022).



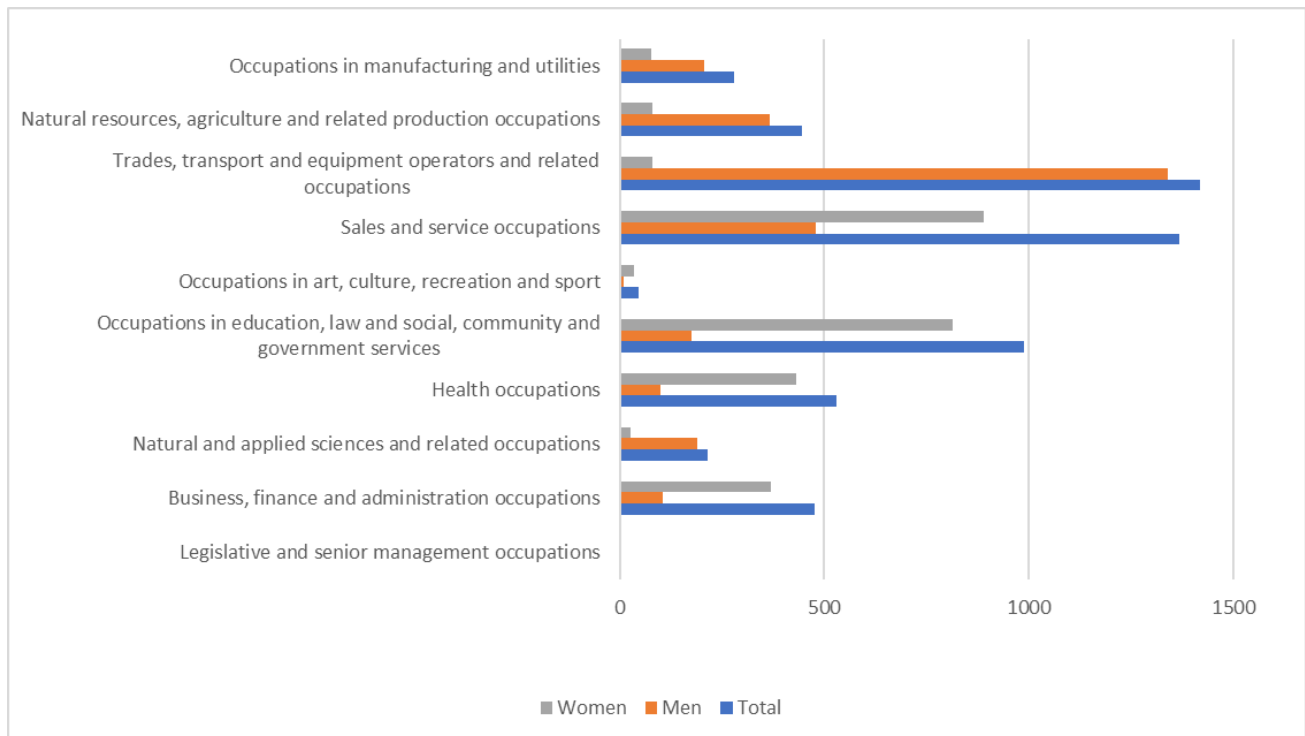


Figure 4-3 Occupation by Gender, Marystown Area, 2021

4.3.2 Housing and Temporary Accommodations

In 2021, the number of occupied dwellings in Marystown was 2,328, up by 5.4% from 2,209 in 2016 (Statistics Canada 2017, 2022). In 2021, the average value of a home on Marystown was \$205,400 and the average monthly rent was \$724 (Statistics Canada 2022). In June 2025, the average price of a home in Marystown was \$182,017 and the number of active real estate listings as of July 2025 was approximately 50 (Houseful 2025). The Area has a surplus of social housing, including a new 20-bed shelter for women announced in 2024, and several seniors housing units have been constructed in recent years (GNL 2024).

Past projects had some adverse effects on the community infrastructure and services in the Marystown Area, particularly housing demand. It has been said that Marystown was ill-prepared for the social impacts of the White Rose project, with reports of increased rents, as well as people moving into cabins or other accommodations, while leasing out their own homes to the construction workforce (D. Kelly, pers. comm.; Herridge 2014). As a result of the White Rose experience, new homes and apartments were constructed. Several dozen seniors’ units have also been added to the area, making it better prepared for any new projects (D. Kelly, pers. comm.).

There are four hotels, motels, inns, and bed-and-breakfasts in the Marystown Area, with approximately 180 rooms (NLT 2022).



4.3.3 Ports and Airports

The Marystown-Winterland Airport is an Airport of Entry/15 which handles unscheduled flights and forestry protection and medivac flights (CBSA 2022). It is maintained by the Department of Works Services and Transportation, and could, with suitable upgrades and certification, handle scheduled passenger flights. There have been discussions within the Town to revitalize the Marystown Airport, but no action has been taken to date (D. Kelly, pers. comm.).

There is a deepwater, year-long ice-free port at Mortier Bay that is managed by the Marystown Port Authority and is the site of a marine facility and service centre.

4.3.4 Utilities

The Marystown Area water treatment plant, which was completed in 2012, has gravitational feed from the Clam Pond/Fox Hill reservoir. The system pumps approximately 4,300 m³/d and has the capacity to serve double the number of properties on the system currently (about 2,500 residential and 200 commercial) with one pump (Tract 2017).

The majority (90%) of the Town of Marystown is connected by sewer mains to 39 outfalls, a system put in place around 1966; the remaining 10% have private systems with outfalls to the ocean.

Waste from the Marystown Area is currently sent to a landfill near Jean de Baie, which is managed by the Burin Peninsula Regional Service Board. There are discussions about creating a transfer site at Frenchman's Cove, with waste transferred to Robin Hood Bay in St. John's.

4.3.5 Education

In 2024-2025, there were six elementary, junior high, and high schools in the Marystown Area, two of them in Marystown. Total enrolment in 2024-2025 was 1,237 (NLEECD 2025).

The CNA has a campus in Burin that offers a range of courses and programs. In 2017-2018, the Burin campus had 214 full-time and part-time students (CNA 2018).

The White Rose project had some effects on the E&T systems of the Marystown Area. Local employment associated with the project was much greater than that of the earlier projects, with some staff bringing their families to Marystown. As a result, the elementary school had to handle an influx of about 50 additional students, and it was necessary to hire an English as a second language teacher. However, this was done without difficulty, and as was the case on the Isthmus of Avalon Area, the in-migrant families reportedly integrated well into the community (PRAC 2009). Furthermore, continued declining enrolments in the Marystown Area have left some additional capacity in the school system (K. Lundrigan, pers. comm.).



4.3.6 Health and Emergency Services

The Marystown Area has one acute-care facility, the Burin Peninsula Health Care Centre, which has 41 beds. There are no long-term care beds in the Area. It currently has 29 doctors serving approximately 20,000 residents.

The Marystown Community Services Office offers public health services including prenatal education and support, breastfeeding support, child health clinics, preschool health check clinics, and immunizations (Eastern Health 2024). There is no evidence that White Rose construction work had effects on the demand for medical services in the Marystown Area.

Police services are provided from the Burin Peninsula RCMP detachment in Marystown. In 2009 the Marystown Regular Member complement was 15 officers and in 2018 it was 21 (CBC News 2018; W. Edgecombe, pers. comm.). In 2024, a new RCMP office was opened in Marystown to replace the previous building (RCMP 2024). Total violent Criminal Code violations rate per 1,000 population was 13.5 for Burin Peninsula District, RCMP in 2024. This was down 5.0% from 2023 (14.2 per 1,000). In 2021, property crime rates per 1,000 population was 18.5, peaking in 2023 at 19.3, and has been gradually decreasing since then to 18.0 per 1,000 population in 2025 (GNL n.d.). Between 2023 and 2024, the CSI for the Marystown RCMP detachment increased from 85.19 to 96.47 (Statistics Canada 2025).

During the construction of the Hibernia and White Rose projects, there were additional policing requirements to manage theft, vandalism, drug problems, and increased smuggling from Saint-Pierre et Miquelon. The increased criminal and highway enforcement activity was seen as proportional to the increase in population and traffic and within the enforcement capability (Husky Energy 2007; W. Edgecombe, pers. comm.).

The Marystown Volunteer Fire Department has 30 volunteer firefighters. In 2024, the Department responded to 114 calls for service, compared to 118 calls in 2023 (Marystown Volunteer Fire Department 2024). The Town of Marystown has a mutual aid agreement with the Town of Burin regarding extension of fire services where necessary (D. Kelly, pers. comm.).

4.4 Placentia Area

The Port of Argentia is a heavy industrial seaport 120 km from St. John's. Formerly the site of a United States Naval Base, the Port is being redeveloped with a diverse group of users and tenants involved in marine transportation, manufacturing, information technology, construction, offshore oil, mining, wind power, and other sectors. It is a deepwater, ice-free port and has container facilities.

The Northside Industrial Park, adjacent to the port and dock lands, includes over 4 km² of flat land. The site is zoned industrial and powered by 12.5 kV electrical service. It has steel fabricators, crane rentals, warehousing, marshalling and laydown yards and expansion plans would see various other service and supply companies operate from this location (Port of Argentia 2019). The Southside Industrial Park is a 40 km² site. It is fully serviced and zoned industrial and suitable for small-to-medium sized manufacturing and warehousing operations.



The Cahill Fabrication Structural group operates a fabrication facility within the Port of Argentia. It has 2,000 ha of flat, load-bearing land, 4,000 m² of indoor fabrication space, and a laydown area of 30,000 m².

A custom graving dock at the Port of Argentia was the site of construction of the West White Rose project's Concrete Gravity Structure (CGS).

4.4.1 Demography and Economy

The population of the Placentia Area in 2021 was 9,020, of whom women and men represented 51.4% and 48.6% respectively (Table 4-7). Between 2016 and 2021, the population decreased by 1.0%.

Table 4-7 Total Population and Labour Force, Placentia Area, 2021

	Total	Men+	Women+
Population	9,020	4,560	4,460
Population aged 15 years+	8,100	4,075	4,025
Labour force	4,230	2,175	2,055
Participation rate (%)	52.2	53.4	51.1
Employed	3,390	1,690	1,700
Unemployed	810	465	345
Unemployment rate (%)	19.1	21.4	16.8

Notes:

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2019) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables

Source: Statistics Canada 2022

In 2021, the Placentia Area had a total labour force of 4,230 of whom 51.4% were men and 48.6% were women. The Area had a total unemployment rate of 19.1% in 2021 and the mean total income in the Placentia Area in 2020 was \$49,087 (Statistics Canada 2022).

The Indigenous population in the Placentia area is 175 individuals, consisting of 54.3% men and 42.9% women (Table 4-8). This labour force is comprised of 51.4% men and 48.6% women. There is a 17.1% unemployment rate, made up of 30 unemployed individuals, which is divided equally by 50% of men and women.



Table 4-8 Indigenous Population and Labour Force, Placentia Area, 2021

	Total	Men+	Women+
Population	175	95	75
Population aged 15 years+	175	90	85
Labour force	80	35	40
Participation rate (%)	45.7	38.9	47.1
Employed	50	30	25
Unemployed	30	10	10
Unemployment rate (%)	17.1	11.1	11.8

Notes:

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Source: Statistics Canada 2022

In 2021, most occupations (28.0%) held by members of the Placentia Area’s labour force were in trades, transport, equipment operators and related (Figure 4-4). Most (90.1%) of these positions were occupied by men. Women held the majority (73.5%) of positions in the sales and service category, which employed 22.4% of the Area’s labour force (Statistics Canada 2022).

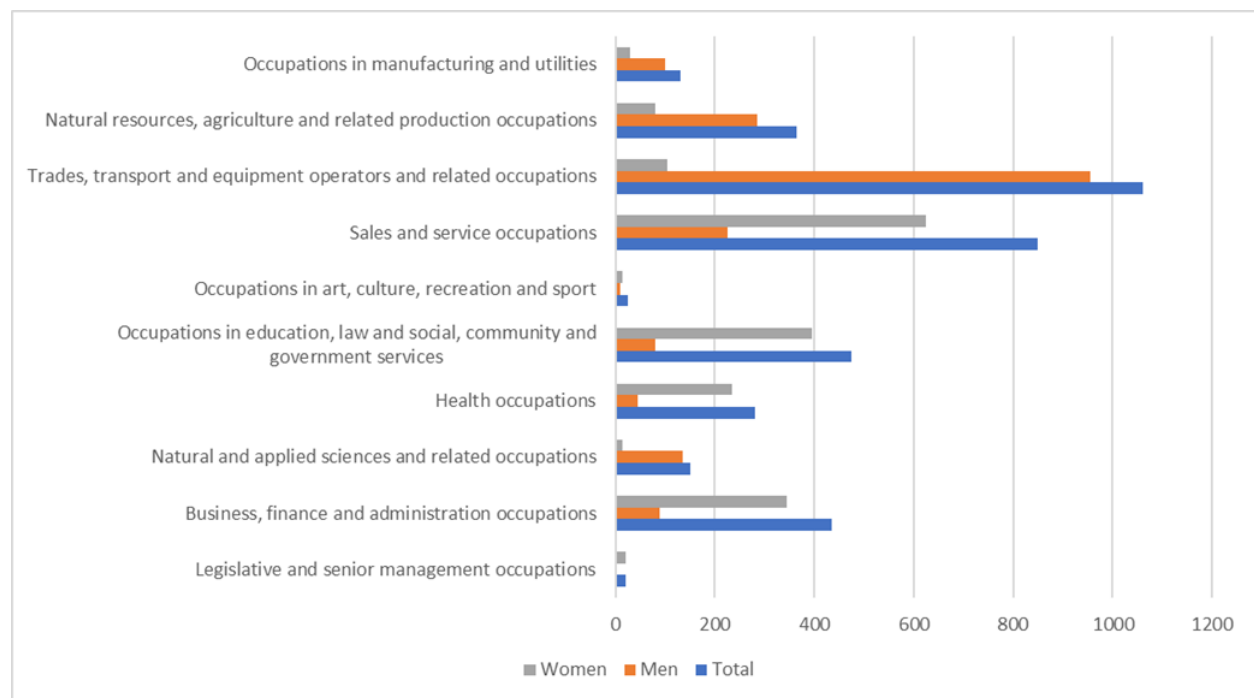


Figure 4-4 Occupation by Gender, Placentia Area, 2021



4.4.2 Housing and Temporary Accommodations

In 2021, the Town of Placentia had 1,543 occupied private dwellings, down from 1,559 in 2016 (Statistics Canada 2023). There are no current data on vacancy rates in the Placentia Area, but in late 2022, there were 12 rental properties listed for the Placentia Area in local classifieds (Point2homes 2022). As of June 2025, the average price of homes was \$198,768 (Houseful 2025).

Past projects, including construction of the Long Harbour nickel processing plant, have had effects on the Placentia Area, particularly its housing market. As people moved into Placentia to take advantage of employment opportunities, rental housing in the Area became scarce and home prices increased. However, since that time, a 200-bed work camp has been constructed in Argentia and housing in Placentia is in good supply (B. Power, pers. comm.). Some areas in Dunville and southeastern Placentia are being developed as subdivisions, which could accommodate up to 100 new homes (C. Hickey, pers. comm.).

The Placentia Area has six hotels, motels and bed-and-breakfasts, which provide approximately 50 rooms (GNL n.d.).

4.4.3 Ports and Airports

The Port of Argentia is an ice-free, sheltered, deepwater transportation hub. It is more than 3 km long and has three wharf complexes: Navy Dock, Marine Atlantic Terminal, and Fleet Dock. Marine Atlantic uses the port for its ferry service between Nova Scotia and Newfoundland and Eimskip of Iceland uses Argentia as a centre for worldwide container forwarding (AMA no date; Port of Argentia 2018).

4.4.4 Utilities

Solid waste from the Placentia Area is trucked to the regional waste management facility at Robin Hood Bay in St. John's. There is also a waste recovery facility at the Ville Marie Landfill on Fox Harbour Road, for residential use only. There is also a waste recovery facility in Whitbourne (Eastern Regional Service Board 2025).

There are three water supply areas within the Area; Larkin's Pond/Clarke's Pond, Wyse's Pond/Curve Pond and Southeast River.

4.4.5 Education

There are six schools in the Placentia Area, which had a total of 518 students during the 2024-2025 school year. This is a decrease of 5.6% from the 2023-2024 school year, when the total student enrolment in the Area was 549 (NLEECD 2025).

In 2008-2009, 204 full-time students were enrolled at the CNA campus in Placentia. By 2017-2018, this had decreased nearly 60% to 90 full-time students. In 2022, the Placentia CNA campus has approximately 100 students and 20 professional staff (CNA 2022).



4.4.6 Health and Emergency Services

The Placentia Health Centre is the main health care facility in the Placentia Area. It has 10 acute care beds and three emergency care beds (Eastern Health 2024). The Placentia Health Centre has four physicians and one nurse practitioner in the outpatient clinic and five emergency physicians. In addition, there is the Dr. W.H. Newhook Health Centre in Whitbourne, and Health and Community Services offices in Placentia, Whitbourne, and St. Bride's. There is also a long-term care facility in Placentia with 75 beds (Newfoundland and Labrador Department of Health and Community Services 2016).

The Placentia Area falls under the jurisdiction of the RCMP. Its Placentia-Whitbourne detachment has eight employees: a sergeant; six investigators (constables); and one detachment assistant (public service employee) (RCMP 2018). Between 2022 and 2023, the CSI for the Placentia-Whitbourne detachment increased from 53.1 and 61.1 (Community Accounts 2024). Demands on police services increased during construction of the Long Harbour nickel processing plant because shift work created heavy traffic on the local highways. Additional officers were required to monitor road traffic, but management measures, such as adjusting the timing of work shifts outside of peak traffic hours, helped alleviate the problem. In addition, more speed signage and implementation of traffic radar have lessened the demand on police services (B. Power, pers. comm.).

In 1994, the fire departments in Placentia, Jerseyside, Freshwater, and Dunville amalgamated to serve a much larger single municipality. As of 2018, it had 35 members and receives an average of 60 calls for service annually (Husky 2014; W. Power, pers. comm.).

4.5 Stephenville Area

The Stephenville Industrial Facility, located at the Port of Stephenville, is a newly refurbished 9,300 m² building. Since 2014 it has undergone \$10 million in upgrades, including new heating and exhaust systems and a new building envelope. It was used for fabrication of components for the Hebron GBS. More recently the building has been used for storage for the Emera Maritime Link power transmission project.

Stephenville has potential for increased development and economic activity with the potential World Energy GH2 wind project, possible changes in ownership of the Stephenville Airport, and potential expansion, as well as upgrades to the port.

4.5.1 Demography and Economy

In 2021, the population of the Stephenville Area was 16,890, a decrease of 5.3% from 2016. Women comprised 50.5% of the population in 2021 and men represented 49.5% (Table 4-9). In 2021, the Stephenville Area had a total labour force of 6,470, of whom 50.5% were men and 49.5% were women. The total unemployment rate of the Area was 22.2% and the median total income in 2020 was \$31,400 (Statistics Canada 2022).



Table 4-9 Total Population and Labour Force, Stephenville Area, 2021

	Total	Men+	Women+
Population	16,890	8,360	8,530
Population aged 15 years+	14,910	7,325	7,585
Labour force	6,470	3,265	3,205
Participation rate (%)	43.4	44.6	42.3
Employed	5,035	2,340	2,695
Unemployed	1,435	930	505
Unemployment rate (%)	22.2	28.5	15.8

Notes:

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Source: Statistics Canada 2022

The Indigenous population in the Stephenville area is 8,215 individuals, consisting of 49.6% men and 50.4% women (Table 4-10). Of the total population, 7,150 individuals (87.0% of the total Indigenous population) are aged 15 years and older, considered of working age (Statistics Canada 2023). The Indigenous labour force is made up of 3,510 men (49.2%) and 3,635 women (50.9%). There are 855 unemployed individuals, corresponding to an overall unemployment rate of 11.9% (Statistics Canada 2021).

Table 4-10 Indigenous Population and Labour Force, Stephenville Area, 2021

	Total	Men+	Women+
Population	8,215	4,075	4,145
Population aged 15 years+	7,140	3,510	3,635
Labour force	3,445	1,685	1,755
Participation rate (%)	48.2	48	48.3
Employed	2,585	1,135	1,445
Unemployed	855	565	305
Unemployment rate (%)	11.9	16.1	8.4

Notes:

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Source: Statistics Canada 2022



In 2021, 24.0% of the Stephenville Area’s labour force was employed in sales and service occupations, with 63.8% of these positions held by women (Figure 4-5). A high percentage of positions (20.2%) in trades, transport, equipment operators and related were held by Area residents, with the majority (92.7%) being occupied by men (Statistics Canada 2022).

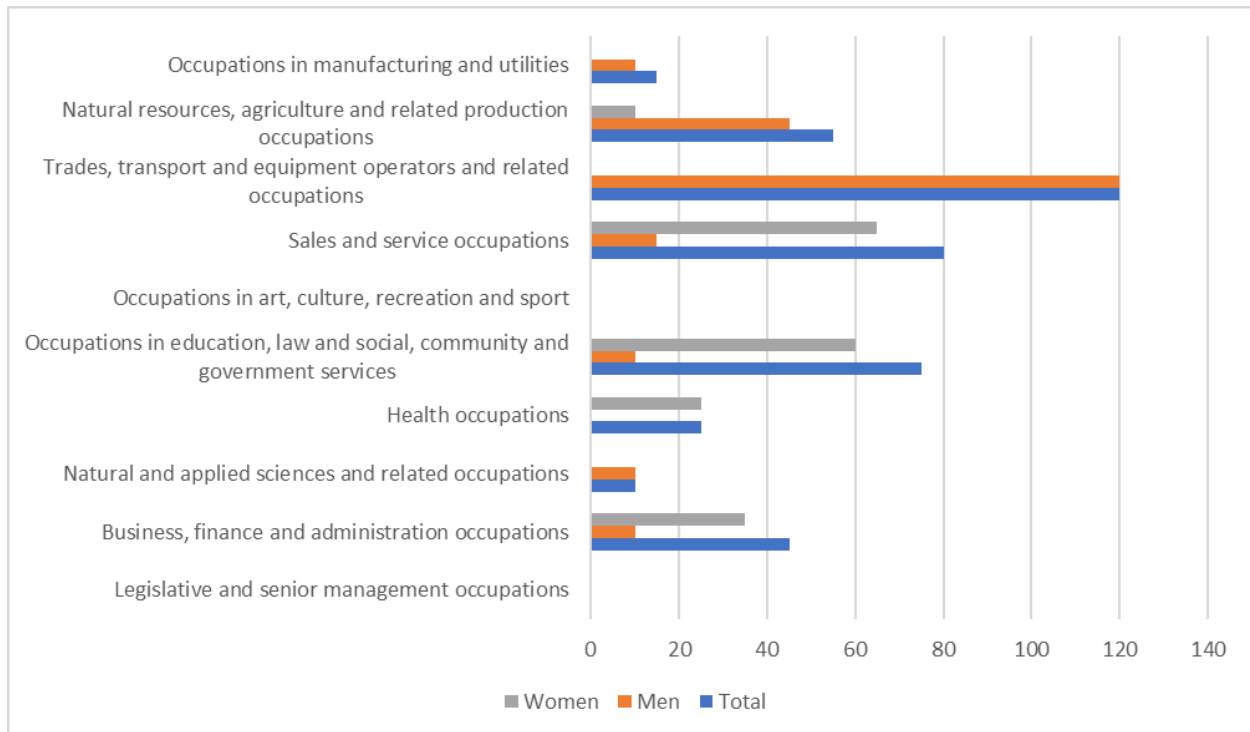


Figure 4-5 Occupation by Gender, Stephenville Area, 2021

4.5.2 Housing and Temporary Accommodations

According to the 2021 Census, there were 8,446 dwellings in the Stephenville Area compared to 7,165 in 2016. The average monthly rent in 2021 was \$749. In 2021, the average home price in the Stephenville Area was \$174,000 and in June 2025 it was approximately \$255,000 (Houseful 2025; Statistics Canada 2022). Stephenville has a surplus of housing from the airport’s former role as a military air base. As was noted above, the fabrication facility has been involved in the Emera Maritime Link and Hebron projects. While 80% of the workforces of these fabrication projects were local, the out-of-town workers who rented accommodations in the Stephenville Area did not create housing problems (T. Rose, pers. comm.).

Stephenville has recently completed two new housing subdivisions which are almost full and there are 50-75 lots still available for future residential development. In addition, due to Stephenville’s older demographic it is anticipated that more housing units may become available in the near future as current residents move into senior living facilities (C. Maddock, pers. comm.).



Stephenville has eight hotels, motels, and bed-and-breakfasts with 124 rooms. Roofed accommodation occupancy rates for the Western region of NL decreased from 46.3% in 2017 to 41.2% in 2018 (TCII 2019). By 2020, the rate had fallen to 24.5% but increased to 49.0% in 2023. In 2024, the occupancy rate fell slightly to 47.5% (NLTCAR 2021; 2024).

4.5.3 Ports and Airports

In 2022, a plan was approved for the purchase of the Stephenville Regional Airport, previously owned by the Stephenville Airport Corporation, by the Dymond Group and it has been renamed the Stephenville Dymond International Airport. This plan included the construction of a new terminal at the airport and an expectation of new job creation and income for the community (CBC News 2022). However, the future of the airport remains uncertain and as of March 2025 it has been downgraded to a “registered aerodrome” offering minimal services (Turner and Antle 2025).

The Port of Stephenville services international and national ships, fishing, aggregate, container and special freight. It operates year-round and is a sheltered, deepwater and ice-free port. The Port can accommodate ships up to 385 m in length.

4.5.4 Utilities

The Towns of Stephenville and Kippens obtain their municipal water supplies from three provincially- and municipally-protected well fields within the Stephenville Municipal Planning Area. Wastewater treatment in Stephenville occurs through an engineered wetland, which is on the Stephenville Regional Airport property, and was commissioned in 2009-2010. The regional landfill was built in 2016 and has a lifespan of 50 years (T. Rose, pers. comm.).

4.5.5 Education

In the 2024-2025 school year, there were 1,740 students enrolled in 10 schools in the Stephenville Area. This was a decrease from 1,775 students in 2023-2024 (NLEECD 2025).

The Bay St. George campus of CNA is in Stephenville. Full-time credit course registration is approximately 750 students per semester, with another 100 registered part-time. About 1,000 students participate in continuing education evening courses. The campus has a residence with a capacity of 170 students. A new Center of Excellence for Heavy Equipment and Industrial Trades opened in 2019. The \$18.5 million facility includes a classroom and shop building, as well as improvements to the large maintenance garage, carpentry shop, and associated site infrastructure (NLAESL 2017).

4.5.6 Health and Emergency Services

Until April 2023, health care in the Stephenville Area was managed by Western Health, which offered acute, long-term care, and community-based services throughout the Province’s Western region. The Primary Health Care area for Bay St. George (BSG) includes six municipalities: Stephenville, Kippens, Lourdes, Port au Port East, St. George’s, and Stephenville Crossing, as well as two local service districts: Barachois Brook and Bay St. George South. In 2023, Western Health had 100 family medicine physicians, a decrease from 103 in 2019. Western Health had 77 specialists in 2023, up from 73 in 2019 (CIHI 2024).



As part of the reorganization of the Province's health system, Western Health is now part of NL Health Services' Western Zone. This includes communities from Port aux Basques, southeast to Francois, northwest to Bartlett's Harbour, and on the eastern boundary north to Jackson's Arm. The main hospital in the Western Zone is the 164-bed Western Memorial Hospital in Corner Brook, which opened in June 2024 (Western Health 2024).

Sir Thomas Roddick Hospital in Stephenville has 44 beds and provides the essential health care services for the Area. In addition to the hospital, there are seven rural medical clinics in BSG (Western Health 2016).

The Bay St. George Long Term Care Centre in Stephenville has 114 beds and provides nursing, dietitian, occupational therapy, and physiotherapy services to its residents. The Emile Benoit House, also located at this site, has 20 apartments in the congregate housing and 38 cottages for senior independent living (Western Health 2016).

While Western Health is experiencing a doctor shortage, including in the Stephenville Area, it is working to establish a new "collaborative care team" to help people in the area who do not have family doctors. Six medical clinics with the capacity to serve 19,000 people in the Stephenville-Bay St. George "health neighbourhood" will be included in the collaborative care team. The Bay St. George Medical Clinic in Stephenville will function as a hub site. Five other smaller clinics – in Jeffrey's, St. George's, Stephenville Crossing, Lourdes and DeGrau – will get support from the clinic in Stephenville (Rhivu 2022).

The Bay St. George RCMP detachment in Stephenville has 20 officers. Between 2023 and 2023, the CSI increased for this detachment from 86.1 to 97.5 (Community Accounts 2024). Stephenville has a fire department with eight full-time firefighters, a fire chief and a deputy fire chief. The fire department also has an agreement with Kippens, which has a staff of about 20 firefighters (Rose, pers. comm.).

4.6 Port aux Basques Area

Talon Energy Services operates the Port aux Basques Industrial Facility, which includes 68,000 m² of land adjacent to the Marine Atlantic terminal and has approximately 1,500 ft of ocean frontage. It includes a 50,000 ft² building, equipped with a pair of 50 tonne cranes and a 135 tonne crane. The site also has an 81,440 ft² warehouse with 10 offices. In the past it has been used for fish processing and was the site of construction of subsea structures for the White Rose project, as well as a flare boom for the Hebron project.

4.6.1 Demography and Economy

Between 2016 and 2021, the population of the Port aux Basques Area increased 18.3% to 9,760. Women and men comprised 35.2% and 64.8%, respectively, of the population (Table 4-11). In 2021, the Port aux Basques Area had a total labour force of 2,920 of whom 51.0% were men and 49.0% were women. The Area had a total unemployment rate of 20.5% in 2021 and the average total income in 2020 was \$43,000 (Statistics Canada 2022).



Table 4-11 Total Population and Labour Force, Port aux Basques Area, 2021

	Total	Men+	Women+
Population	9,760	6,325	3,435
Population aged 15 years+	9,480	6,370	3,110
Labour force	2,920	1,490	1,430
Participation rate (%)	30.8	47.9	46.0
Employed	2,310	1,170	1,140
Unemployed	600	310	290
Unemployment rate (%)	20.5	20.8	20.3

Notes:

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2019) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables

Source: Statistics Canada 2022

The Indigenous population in the Port aux Basques area is 365 individuals, consisting of 52.1% men and 47.9% women (Table 4-12). Of this population, 86.3% of the total Indigenous population are aged 15 years and older, considered of working age (Statistics Canada 2022). This labour force is comprised of 51.6% men and 46.8% women. There are 600 unemployed individuals, corresponding to an overall unemployment rate of 20.5% (20.8% among men and 20.3% among women) (Statistics Canada 2022).

Table 4-12 Indigenous Population and Labour Force, Port aux Basques Area, 2021

	Total	Men+	Women+
Population	365	190	175
Population aged 15 years+	310	160	145
Labour force	135	75	55
Participation rate (%)	43.5	46.9	37.9
Employed	85	40	40
Unemployed	40	15	10
Unemployment rate (%)	12.9	9.3	6.9

Notes:

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2019) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables

2021 'Total Population' and 'Indigenous Populations' data from 2021 Census of the Population – Census Profile.

Values shown in "Total" columns are the sum of male and female Census Subdivision (CSD) subsets taken from Statistics Canada's 2021 Census Profile (Census of the Population). Due to Statistics Canada rounding (Statistics Canada 2022) totals may not exactly align with those shown on CSD Census Profiles and may not sum across tables.

Source: Statistics Canada 2022



In 2021, most occupations (29.3%) held by members of the Area’s labour force were in trades, transport, equipment operators and related (Figure 4-6). Occupations in sales and service were held by 25.7% of the labour force. Women held the majority (61.3%) of positions in the sales and service category, and men held the majority (83.3%) of trades, transport, equipment operators and related positions (Statistics Canada 2022).

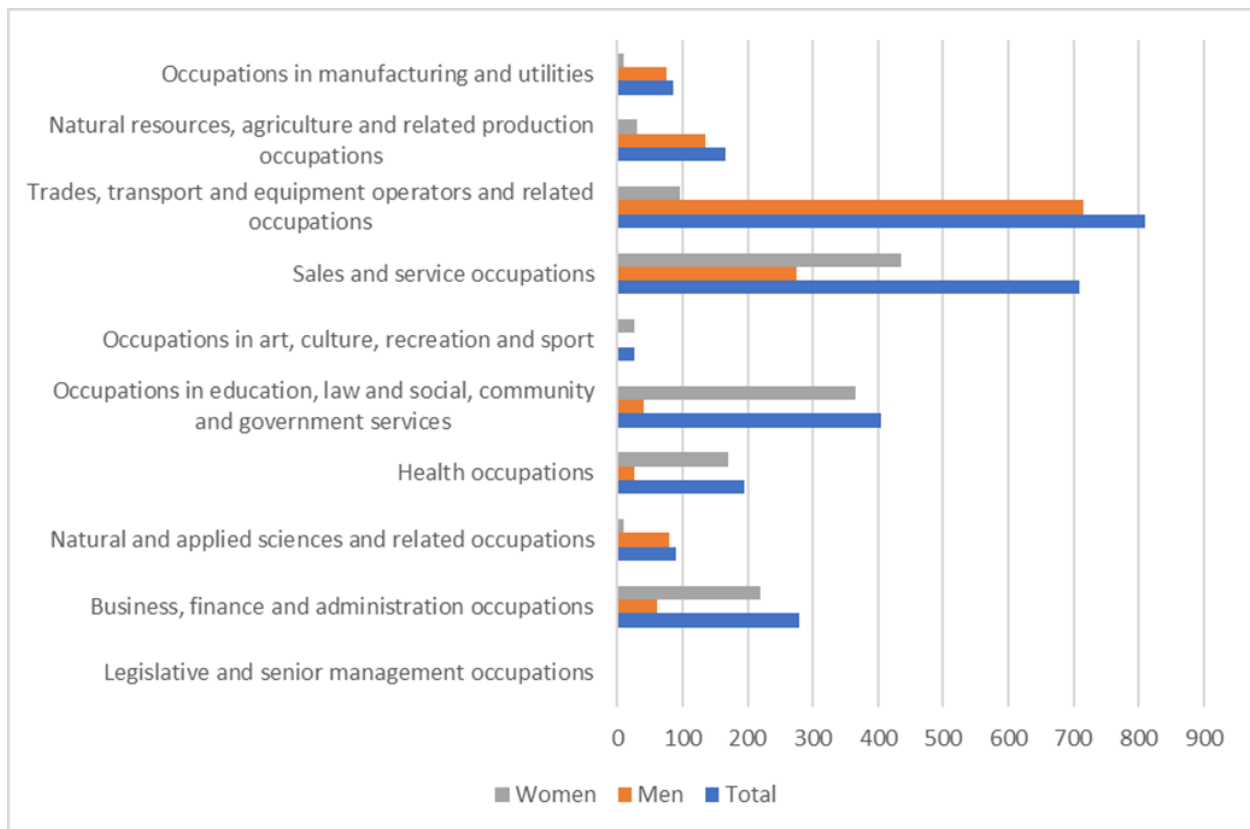


Figure 4-6 Occupation by Gender, Port aux Basques Area, 2021

4.6.2 Housing and Temporary Accommodations

The number of occupied dwellings in Port aux Basques Area decreased from 3,685 in 2016 to 3,331 in 2021 (Statistics Canada 2022). The average home price in 2021 was \$151,800 and average rent was \$704 (Statistics Canada 2022). Most of the new housing development in the Area has been in Grand Bay West and Grand Bay East where a total of 76 residential building permits had been issued; these areas remain the growth areas of Channel-Port aux Basques.

A survey of damage created by Hurricane Fiona in September 2023 indicated that approximately 100 homes were destroyed between Port aux Basques and Burgeo (The Canadian Press 2022).

There are two hotels in the Port aux Basques Area, with a total of 133 rooms (Channel-Port aux Basques 2025). Port aux Basques is also in the Western tourism region (NLTCAR 2022).



4.6.3 Ports and Airports

The harbour at Port aux Basques is equipped with 10 deepwater docks that vary in length and depth to accommodate ships of various specifications. The Marine Atlantic ferry is the only shipping service operating from the harbour, with the Canadian Coast Guard, oil tankers, cruise ships, and other occasional shipping companies also using it.

4.6.4 Utilities

The Port aux Basques Area has a municipal water supply system supplied from the Gulf and Wilcox Ponds. The Area is served by a municipal sanitary sewer system. With the permission of the provincial government, sewage is collected and pumped into the sea; in the older areas of the Town, many homes and business premises have private outfalls into it. Over the past decade, the Town has undertaken preliminary engineering work for the development of a waste treatment facility.

The Town of Channel-Port aux Basques provides a weekly residential garbage pickup service. Garbage is brought to a new regional waste management site for the Area located on the Trans Canada Highway.

4.6.5 Education

The Port aux Basques Area has four schools that serve students from K-12. The total enrolment for the 2024-2025 school year was 579, down from 605 in 2023-2024 (NLDEECD 2025).

The CNA campus in Port aux Basques offers full-time credit course registration with approximately 140 students per semester, with an additional 25 registered part-time. The college also has about 200 students participating in the continuing education evening courses.

4.6.6 Health and Emergency Services

The main hospital in the Port aux Basques Area is the Dr. Charles L. LeGrow Health Centre, which serves approximately 9,000 people. It has 44 beds, 26 of which are long-term care and 12 of which are acute care. It operates three medical clinics at Doyles, Rose Blanche and La Poile. Ambulance services are provided to the Area by MacKenzie Ambulance. A senior housing complex adjacent to the hospital has 21 cottages and a 21-unit apartment building (Channel-Port aux Basques 2023; Western Health 2016).

There is a RCMP detachment in Channel-Port aux Basques but statistics for this detachment are not available. Fire protection services are provided by the Channel-Port aux Basques Volunteer Fire Department which has 33 members and two stations serving the community.



4.7 Issues Scoping Conclusion

As described in the previous sections, a number of steps have been taken to outline the existing socio-economic conditions in the St. John's Impact Area and each of the Potential Impact Areas, how they were affected by previous oil and gas and other large projects, and the attitudes of municipal and other authorities towards possibly hosting Project-related activity.

Statistics Canada data indicate that, while the St. John's Area has seen steady population growth, and the Port aux Basques Area has experienced rapid population growth, the total populations of the other Potential Impact Areas decreased between 2016 and 2021 (Statistics Canada 2022). This suggests that they have underutilized infrastructure and services and, therefore, spare capacity that could be used to meet any Project-related demand.

Consultations with key informants and a review of existing literature also indicate that the infrastructure and services in the St. John's Impact Area and most other Potential Impact Areas have not been adversely affected by past projects. They also confirm that infrastructure and services in St. John's, Isthmus of Avalon, Marystown, and other Potential Impact Areas are adequate to support Project-activities and requirements which are relatively small in comparison to past projects. The exception to this is health care services and infrastructure, which are currently experiencing challenges Province-wide meeting demands, as described in Section 3.3.1.

St. John's is a metropolitan area with considerable experience hosting the workforces and activity associated with other oil and gas projects. Interviews with authorities on housing, utilities, education, health, and transportation infrastructure and services indicate that past projects have not been problematic, and that the area currently has adequate capacity for demands that may be created by new oil and gas projects, including the Project.

The Port of St. John's is well positioned to handle increased traffic due to recent upgrades, including the addition of a finger pier which has increased the capacity of the Port to service more vessels (McCarthy, pers. comm.). St. John's International Airport has seen similar increases in capacity and capabilities. The landfill at Robin Hood Bay, which also accepts waste from other Potential Impact Areas, has a lifespan of approximately 40 years, which may increase with greater waste diversion efforts (Niblock, pers. comm.). Adverse effects as a result of the Project on local infrastructure and services are not expected by most key informants; although, the demand for housing in the St. John's Area has increased since 2019 and the vacancy rate for properties is relatively low. However, NL's housing stock saw growth between 2023 and 2024 as housing starts in the St. John's Area increased 78.5% (NLDF 2025).

As described in Section 3.3.1, the Province has experienced health care staffing challenges in recent years, which has resulted in the temporary closure of some emergency rooms. The provincial government is taking steps to improve access to health care in NL through the reorganization of the health system, expansion of virtual health care services, and opening of new hospitals and health care centres, including the Mental Health and Addictions Centre and a new urgent- and ambulatory-care centre in St. John's. Despite improvements, the Project may contribute to demands on a health care system that is currently operating beyond its capacity, regardless of which Potential Impact Area sees the Project-related activity.



Equinor is committed to implementing management plans, such as the Project Health and Safety Plan, to minimize Project-related effects on health care and emergency infrastructure and services.

Potential Impact Areas have experienced the effects of resource development project activity and are well prepared for more. The literature on the effects of past offshore petroleum and other development projects, along with telephone interviews with key informants, indicate that the majority of concerns about the effects of previous projects on the socio-economic environment were not realized. Experience with the construction and operations of such projects as Hibernia, Terra Nova, SeaRose and Hebron has shown concerns about demands on local services were largely unjustified. For example, the ability of the Isthmus Area communities to accommodate Hibernia construction workers were resolved through the use of an onsite work camp, and research has shown that Hibernia-related demand had little effect on overall demand or house prices, and that any increases experienced were short-term (Stantec Consulting Ltd. and Keith Storey Consulting 2011). In all cases this was with respect to the effects of projects that involved substantially more development phase activity than the Project.

In those few cases where past offshore petroleum and other development project demands did exceed the available capacity, such as in Placentia, which experienced increased traffic associated with construction at Long Harbour, and Marystown, which saw pressure on the rental housing market, proponent management measures rapidly rectified the situation. As a result of the SeaRose experience, new homes and apartments were constructed and several dozen seniors' units have been created in the Marystown-Burin area, making it better prepared for new projects (Herridge 2014).

Considering the Province's experience with oil and gas projects, there is now little municipal government concern about their ability to deal with offshore-related projects. The Hibernia, Terra Nova, SeaRose and Hebron projects clearly demonstrated that local governments were well prepared to deal with future projects. As a result, there has been a reduction in public concern, and project assessments and subsequent events confirmed that with appropriate management strategies in place the socio-economic effects of offshore petroleum projects are almost entirely positive (Stantec Consulting Ltd. and Keith Storey Consulting 2011). Throughout the scoping interviews, and through other Equinor public consultation, key informants expressed enthusiasm for a new project and for the possibility of hosting some or all of its fabrication activity. The Project will also deliver taxes and royalties that increase the ability of the provincial government to support such infrastructure and services, both directly and through grants to municipal governments.

As a result of the scoping process, and with implementation of planned effects management and enhancement measures, which are described in Section 5, no adverse effects of the Project on Economy, Employment and Business and Community and Regional Infrastructure and Services of the St. John's Impact Area or other Potential Impact Areas are expected. However, the Project is predicted to have positive effects on the socio-economic environments of the Province, the St. John's Impact Area and Potential Impact Areas. These are described in Section 6.1.



5 Effects Management

Equinor will implement a number of effects management measures, as described in the Project Environmental Impact Statement (Equinor Canada Ltd. 2020). The following fabrication facility plans are of direct relevance to the socio-economic impact assessment because they contain specific measures to manage effects on infrastructure and services:

- Environmental Management Plan;
- Transportation Plan;
- Waste Management Plan; and
- Health and Safety Plan.

The Project Benefits Plan (Equinor 2026) (including Diversity and Inclusion Plan) are other key measures to manage effects on the socio-economic environment. Section 45 of the *Accord Acts* requires that a Canada-NL Benefits Plan be submitted and approved before any petroleum work or activity can take place in the Canada-NL offshore area. The Project Benefits Plan describes in detail how Equinor will meet the *Accord Acts*' requirements for project management, employment, E&T, business community participation, diversity programs and R&D.

The Diversity and Inclusion Plan, included in the Project Benefits Plan (Equinor 2026), describes how underrepresented individuals or groups and their companies will be integrated into the Project through employment, training, and contracting. Underrepresented individuals include, but are not limited to, women, Indigenous peoples, racialized people, persons with disabilities, and any other disadvantaged individuals or groups. Equinor acknowledges that the definitions of these groups that is provided in the Employment Equity Act are under modernization review. Two new designated groups will be added, including Black people and 2SLGBTQI⁴ and for the purposes of this Project Diversity and Inclusion Plan will be considered as under-represented groups. Equinor acknowledges that individuals may identify as belonging to more than one under-represented group and/or a group that is not listed. More details on the Project Benefits Plan (Equinor 2026), including the Diversity and Inclusion Plan are provided in Section 6.1.

Engagement is also a key component of Equinor's approach to the planning and implementation of the Project, and it is essential to the management of socio-economic effects. Several engagement initiatives have been undertaken in relation to the Project (Section 3.3.2) and its EIS, with further engagement for the Development Application, including the SEIS, and Benefits Plan (Equinor 2026) (including Diversity and Inclusion Plan). This includes discussions with relevant government departments and agencies, Indigenous groups, and stakeholder organizations. Equinor will maintain ongoing, active engagement and communication with Project stakeholders to ensure that unexpected effects are identified and managed, increasing positive effects and reducing adverse ones.



6 Effects Assessment

As described in Section 4.7, considering the results of the scoping process, and with implementation of planned effects management and enhancement measures, which are described in Section 5, no adverse effects of the Project on Economy, Employment and Business and Community and Regional Infrastructure and Services of the St. John's Impact Area or Potential Impact Areas are expected.

Therefore, the rest of this assessment focuses on the positive effects of the Project on the two VCs.

6.1 Economy, Employment and Business

For the purposes of measuring the economic impact, a model was developed to project the anticipated economic impact of the initial phase of the Project. The model measures the proposed economic impact associated with a two-field development, Bay du Nord and Cambriol. Using such an approach provides representation of the scope that is under review as per this Development Application. It should be noted that this is considered the minimum economic impact, and the most likely outcome is expansion via improved oil recovery methods and tie-backs to known discoveries and prospects. The model measures the direct, indirect, and induced impacts from the Project, where:

- Direct effects result from labour, materials, and services demand from Equinor and its contractors during Project construction and operations (e.g., labour, project management);
- Indirect effects result from contractor expenditure on goods and services (e.g., employment with suppliers/manufacturers of materials used during construction); and
- Induced effects result from spending by direct and indirect workers on consumer goods and services (e.g., restaurant servers, retail positions).

The estimated price per barrel used in this analysis is \$72, which aligns with the SPROULE 2025 forecast.

Internal work from Equinor has also provided workforce estimates. Preliminary workforce planning suggests that direct employment associated with Project operations could include 150 permanent offshore rotational positions in addition to 385 new full-time onshore direct and indirect support positions. These would be high-paying jobs staffed primarily by local personnel, serving to stimulate and sustain the local economy over the life of field. Furthermore, most are also globally transferrable positions, thus facilitating personnel finding employment in other oil and gas jurisdictions as well as other natural resource sectors such as wind, mining, and hydroelectric.

In addition to economic impacts stemming from capital and operational expenditures, Equinor will also invest \$100 million in R&D to advance the Province's global capacity for innovation in areas such as additive manufacturing, artificial intelligence, marine technologies, autonomous systems and robotics. Equinor will also invest \$200 million towards a provincially led fabrication fund (Government of NL 2026).



It is worth noting the contributions of the Project in the context of the oil and gas industry in NL. From 2018 to 2024, offshore petroleum activity added an average of \$8.9 billion annually to the Province's nominal GDP, reaching \$9.5 billion in 2024 alone. During this period, oil development and production accounted for 23.3% of nominal GDP, with an estimated 22.5% share in 2024 (Stantec Consulting Ltd. 2025).

Labour compensation increased by an average of \$1.8 billion per year (10.8%) due to offshore petroleum activities. Household income rose by \$2.3 billion (7.9%), while disposable household income after income tax, Employment Insurance (EI), and Canadian Pension Plan (CPP) deductions was up by \$1.5 billion annually. Consumer spending, measured through retail sales, was \$670 million (6.4%) higher on average (Stantec Consulting Ltd. 2025).

Employment related to the oil industry averaged 19,000 jobs (8.2% of total employment) over the period. In 2024, this number rose to 20,500 jobs (8.4%) due to ongoing construction work on the West White Rose project (Stantec Consulting Ltd. 2025).

The Project is projected to provide a substantial contribution to both the provincial and federal GDP. The total direct GDP contributions in NL for construction is expected to be \$4.3 billion. Cumulatively, the total direct GDP contribution for the Province is expected to be approximately \$9.0 billion (excluding production). When accounting for production, total GDP contributions in NL from direct impacts are expected to reach approximately \$34.0 billion. When considering the direct GDP contributions for all of Canada, it is projected to be approximately \$4.6 billion in direct impacts from construction and \$4.6 billion from operations, totaling \$9.2 billion cumulatively. Further details are provided in Table 6-1.



Table 6-1 Impacts to Provincial and National Economy, Capital and Operational Expenditures (C\$M)

Type	Construction			Operations			Cumulative		
	Direct	Indirect	Induced	Direct	Indirect	Induced	Direct	Indirect	Induced
Newfoundland and Labrador									
Output	11,760	3,740	1,646	12,899	7,975	3,669	24,659	11,714	5,315
GDP (excluding production)	4,328	2,258	1,058	4,635	3,984	2,094	8,963	6,242	3,152
GDP (including production)	4,328	2,258	1,058	35,950	3,984	2,094	40,278	6,242	3,152
Other Canada									
Output	619	4,237	2,273	-	-	-	619	4,237	2,273
GDP	251	2,166	1,222	-	-	-	251	2,166	1,222
Total Canada									
Output	12,379	7,976	3,920	12,899	7,975	3,669	25,278	15,951	7,588
GDP (excluding production)	4,578	4,424	2,281	4,635	3,984	2,094	9,214	8,408	4,374
GDP (including production)	4,578	4,424	2,281	35,950	3,984	2,094	40,528	8,408	4,374



Substantial labour income is anticipated to be generated from both capital and operational expenditures. For construction, income generated directly from the Project is expected to reach \$2.7 billion in NL and \$2.9 billion in all of Canada. Labour income also has high indirect impacts (\$1.4 billion in NL and \$2.8 billion in Canada) as does induced labour income (\$447 C\$M in NL and \$1.1 billion in Canada).

For operations, income generated directly from the Project is expected to reach \$3.1 billion (all of which is expected to occur within NL). Labour income also has high indirect impacts (\$2.0 billion) as does induced labour income (\$986 C\$M) during operations.

Cumulatively across both construction and operations, income generated directly from the Project is projected at approximately \$5.9 billion in NL and \$6.1 billion in all of Canada. This comes with high indirect labour impacts (\$3.4 billion in NL and \$4.9 billion in Canada) and high induced labour income (\$1.4 billion in NL and \$2.0 billion in Canada) during operations.

The labour income is derived from the number of person year (PY) of employment that the Project is expected to generate based on the economic model. In NL, during construction, the Project is expected to directly generate 45,947 PY of employment. Across Canada that number is expected to rise to 48,024 PY. Indirect employment generated from the Project is projected at 16,876 PY in NL and up to 34,489 PY in Canada. The Project is projected to generate 8,938 PY of induced employment in NL and 18,868 PY in all of Canada.

For operations, the Project is expected to directly generate 22,606 PY of employment, all of which is expected to occur in NL. Indirect employment generated from the Project in NL is projected at 29,539 PY and induced employment is expected to reach 22,096 PY.

Cumulatively, across both phases, the Project is expected to directly generate 68,552 PY of employment in NL. Across Canada, that number is expected to rise to 70,630 PY. Indirect employment generated from the Project in NL is projected at 46,415 PY and up to 64,037 PY in Canada. The Project is projected to generate 31,033 PY of induced employment in NL and 40,964 PY in all of Canada.

A breakdown of this data is provided in Table 6-2 and Table 6-3.



Table 6-2 Impacts to Labour, Capital and Operational Expenditures (C\$M)

Type	Construction			Operations			Cumulative		
	Direct	Indirect	Induced	Direct	Indirect	Induced	Direct	Indirect	Induced
Newfoundland and Labrador									
Labour Income	2,740	1,411	447	3,128	2,033	986	5,868	3,445	1,433
Employment (PY)	45,947	16,876	8,938	22,606	29,539	22,096	68,552	46,415	31,033
Other Canada									
Labour Income	196	1,407	611	-	-	-	196	1,407	611
Employment (PY)	2,078	17,622	9,930	-	-	-	2,078	17,622	9,930
Total Canada									
Labour Income	2,936	2,819	1,058	3,128	2,033	986	6,063	4,852	2,044
Employment (PY)	48,024	34,498	18,868	22,606	29,539	22,096	70,630	64,037	40,964

Table 6-3 Direct, Indirect and Induced Labour (Person Year) Generated from the Project

Geography	Impact	Construction	Operations
Newfoundland and Labrador	Direct	45,947	22,606
	Indirect	16,876	29,539
	Induced	8,938	22,096
Total Canada	Direct	48,024	22,606
	Indirect	34,498	29,539
	Induced	18,868	22,096

Notes:

Modelled values are based on the results of Stantec's input-output model.



The provincial government will receive substantial revenue in taxation from the Project, which is expected to reach nearly \$3.6 billion (similar to the federal government). The provincial government is also projected to obtain over \$8 billion from the Project in royalties. Combined, the returns to both levels of government are expected to approach over \$15 billion.

Further information is provided in Table 6-4.

Table 6-4 Impacts from Taxation, Newfoundland and Labrador (C\$M)

Type	Impact (C\$M)	
	Provincial	Federal
Taxation	3,582	3,582
Royalties	8,016	-
Total	15,179	

6.1.1 Benefits Planning

As noted in Section 4, reports written for ERINL (formerly Petroleum Research Newfoundland & Labrador) have concluded that the offshore petroleum industry has had large, widely distributed, and long-term beneficial effects on the Province, and that it has made, and will continue to make, a very important contribution to the economy and society of NL. This has included benefits in the areas of infrastructure development, support for R&D, growth of the local supply and service sector, diversification of the economy, and an expansion of employment and business opportunities to under-represented groups and the companies they own and control (Stantec Consulting Ltd. 2019).

Consultations with key informants and a review of existing literature make clear that the St. John's Impact Area and each of the Potential Impact Areas have been positively affected by past projects, and indeed there is widespread enthusiasm about the potential consequences of the Project for the economy, employment and business. In the Placentia Area, for instance, residents and business leaders fully recognize the benefits such projects bring to the community in terms of employment and business opportunities (Hiscock 2018). Community consultations for past resource development projects have also reinforced the positive attitudes of residents of Potential Impact Areas towards future oil and gas development (Stantec Consulting Ltd. and Keith Storey Consulting 2011), and a 2019 opinion poll found that 86% of Newfoundlanders and Labradorians agree that the health of the NL economy is closely tied to the offshore petroleum industry (NOIA 2019).



As discussed in Section 1.3, the Project will create and optimize opportunities and benefits for NL and Canadian workers and companies as part of its activities and operations in the Canada-NL offshore area and through its commitments in the Project Canada-NL Benefits Plan. The Benefits Plan will describe the measures that will be taken regarding the employment of residents of NL, and other Canadians, further increasing local skills, capabilities, and experience. This includes members of under-represented groups, the interests of whom are addressed by the Diversity and Inclusion Plan and supported by the Equinor operating model and the influence of Equinor's corporate culture. Consultations to date indicate that the members of these groups do not feel that past offshore petroleum projects have had, or are having, negative impacts on their members. Indeed, they recognize that the industry has taken a lead in addressing diversity and inclusion issues, and they are optimistic about the effects of future projects. The Diversity and Inclusion Plan will ensure that the Project supports such optimism through initiatives in the areas of: Managing Diversity and Inclusion; Recruitment and Selection; Respectful Workplace, Work/Family Balance, and Inclusion; Employee Development, Education, and Training; Business Access; and Community Partnerships and Investments and Outreach.

The Benefits Plan will ensure that manufacturers, consultants, contractors and service companies in the Province and other parts of Canada have a full and fair opportunity to participate on a competitive basis in the supply of goods and services, further expanding NL's global supply and service sector.

6.2 Community and Regional Infrastructure and Services

As was noted above (Section 6.1), the Project will deliver substantial taxes and royalties that will increase the ability of the Government of NL to support community and regional infrastructure and services, both directly and through grants to municipal governments. In addition, Equinor will continue to invest in communities across NL, focusing on education, biodiversity, and innovation. Examples of these initiatives include STEMforGirls, the Marine Advanced Technology Education Centre, and a proud sponsor of the NL Folk Festival for more than a decade, among many others. As noted in the Diversity and Inclusion Plan, this will include Equinor and its main Project contractors aiming to partner with community groups representing the interests of the Designated Groups.



7 Monitoring and Follow-Up

Equinor will undertake monitoring and reporting of Project benefits commitments as per the requirements of the C-NLOER. To achieve that, the effects on business and employment will be monitored for the duration of the Project. Further details about the monitoring and reporting of procurement decisions and expenditure and employment levels are provided in the Project Benefits Plan (Equinor 2026). Given the interest in the Project and its associated business and employment opportunities within Potential Impact Area communities, relevant information will be summarized and shared with those communities where Project activities are taking place.

Monitoring of demand for various infrastructure and services is part of the mandate of the specific government departments and agencies. Equinor will communicate with these authorities to receive information about ongoing concerns and to provide Project information so that appropriate action can be taken to alleviate any potentially problematic increase in demand.



8 Conclusion

Equinor is proposing to develop the Bay du Nord Project using existing fabrication facilities in NL where possible and appropriate based on competitive award of Project contracts. The Project's five-field scenario will provide longer term and sustained construction employment than experienced with other offshore petroleum projects in NL.

The results of issues scoping revealed that the populations of the Potential Impact Areas, with the exception of St. John's, are declining. Research indicates that infrastructure and services in these areas have the capacity to support Project-activities. In addition, the St. John's Impact Area and Potential Impact Areas have had prior experience with oil and gas projects, and pre-project concerns were largely unrealized. As a result, there is now little concern about the ability of infrastructure and services to deal with offshore-related projects and, in fact, municipal representatives expressed enthusiasm for hosting new oil and gas projects and receiving the employment, business and other benefits that are recognized as coming with them.

Considering the Project design, which will require a manageable labour force over a longer period during all phases, along with the results of issues scoping described above, the Project is not expected to have adverse effects on the economy, employment and business or community and regional infrastructure and services of the Potential Impact Areas. It is predicted to have positive effects on both VCs through Project expenditures and taxes and royalties. When accounting for production, total GDP contributions in NL from direct impacts are expected to reach approximately \$40.3 billion (across both construction and operations). Directly labour income across both phases will reach nearly \$5.9 billion, with over \$15 billion in taxes and royalties contributing to provincial and federal governments combined. Work experience, and skills development will deliver employment benefits to a range of residents of NL through the commitments outlined in the Project Benefits Plan (including Diversity and Inclusion Plan) (Equinor 2026).

The Bay du Nord Project represents an investment in NL and its people. It will lead to economic growth and diversification, both by providing work in the oil industry and in other jurisdictions, and by the application of these capabilities in other industries, locally, nationally, and internationally.



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Appendices



Appendix A Key Informants



Table A-1 Key Informants

Organization	Contact
CMHC	Chris Janes, Senior Market Analyst
City of St. John's	Ken O'Brien, Chief Municipal Planner
City of St. John's	Elizabeth Lawrence, Director, Economic Development, Culture & Partnerships
City of St. John's	Andrew Niblock, Director Environmental Services
City of St. John's	Garrett Donaher, Transportation Manager
NL English School District	Wilhelmina Hardy, Director of Schools, Programs Division
St. John's Port Authority	Bob McCarthy, Vice President, Development
St. John's Port Authority	Melissa Williams, Marine Operations and Harbour Master
Eastern Health	Ron Johnson, Vice President and Chief Information Officer
Placentia	Mayor Bernard Power
Isthmus	Clarenville Mayor Frazer Russel
Isthmus	Clarenville Chief Admin Officer David Harris
Marystown	Mayor Sam Synard
Marystown	Chief Administrative Officer Dennis Kelly
Stephenville	Mayor Tom Rose
Stephenville	Town Manager Mike Campbell
Stephenville	Town Manager Colin Maddock



Appendix B Diversity Questions



B.1 Public Consultation/Diversity Questions

1. Do you think offshore oil and gas projects (e.g., Hibernia, Terra Nova, SeaRose and Hebron) and activity have had, or are having, negative impacts on members of the group you represent?

Yes/No

2. Do you think future offshore oil and gas projects and activity are likely to have negative impacts on members of the group you represent?

Yes/No

If 'Yes' to either question:

What are these negative impacts of offshore oil and gas projects and activity?

3. Is any subset of your membership (women, youth, the elderly, or members of any other identity group) particularly experiencing, or vulnerable to, these negative impacts?

How might such inequities be addressed?

4. Do you think members of the group you represent are receiving a fair share of the employment and business benefits from offshore oil and gas projects and activity?

Yes/No

If 'No':

Is any subset of your membership (women, youth, the elderly, or members of any other identity group) particularly missing out, and why?

How might such inequities be addressed?



Table B-1 Diversity Sessions Attendees

Organization
Office to Advance Women Apprentices
Women in Resource Development
Newfoundland and Labrador Organization of Women Entrepreneurs
Genesis
Provincial Advisory Council on the Status of Women
Women in Science and Engineering Newfoundland & Labrador (WISE)
Esteem Women
YWCA St. John's
Inclusion NL
CHANNAL
Canadian National Institute for the Blind
Canadian Hard of Hearing Association
Quadrangle
Choices for Youth
Taskforce NL
First Voice

