The main title "Nova Scotia Offshore Wind" is centered within a dark teal circular graphic. The text is in a large, bold, light green font. The background of the slide is a photograph of several offshore wind turbines in a blue ocean under a clear sky. A thick, light green circular line partially encircles the central graphic.

# Nova Scotia Offshore Wind

Review of Regional Assessment  
Committee Recommendations

December 2, 2024

# Agenda

- Introductions / AECOM OSW experience
- General comments
- Implications for Mi'kmaw communities
- Industry structure
- Environmental considerations
- Socio-economic analysis
- Identified infrastructure investments
- Proposed development areas (PDAs)
- Report recommendations

# Integrating offshore wind in the broader global market

- Supported development of over 80GW of offshore wind infrastructure worldwide
- Led environmental/permitting, electrical design, ports development, OEM support and advisory activities in over 15 countries.
- Project support from feasibility/concept through to decommissioning.



● Advisory   
 ● Construction Support   
 ● Engineering/Design   
 ● Grants/Funding   
 ● Permitting/Environmental Impact   
 ● Technical Studies

## General Comments

- Recognize the significant effort put forth by the RA committee through this process and applaud the quality and comprehensiveness of the draft report.
- Appreciate the efforts made by the committee to consider stakeholder inputs and concerns related to the interim report and address these concerns in the draft report recommendations.
- Concur with committee's view of the scale of the opportunity for Nova Scotia and support the recommendation for the development of a regional or national roadmap to effectively support the sector's sustainable growth.



Sheringham Shoal, UK (Equinor)

## Implications to Mi'kmaw communities

- OSW, as “Nova Scotia’s greatest opportunity since the Age of Sail” offers a unique opportunity towards reconciliation.
- Proposed OSW infrastructure will be installed in the historical lands of the Mi'kmaw people and in the waters used for generations for food and cultural practices.
- Meaningful engagement and participation of Indigenous people is critical to the long term equitable and sustainable development of this industry, and should include:
  - Engagement/participation and potential management/ownership of collected site data, particularly data related to cultural resources, and involvement in the assessment of proposed mitigation plans for any potential impacts.
  - Recognition of, and compensation for, all losses incurred including commercial fisheries, traditional fisheries, and cultural practices.
  - Participation in key decisions related to the development and regulation of the industry.
  - Equitable participation in economic benefits from development of the new sector through employment of Mi'kmaw people, contracting of Mi'kmaw-owned businesses and investment in Mi'kmaw communities.

# Industry Structure



Dogger Bank, UK (SSE)

## Overall Comments

- Support balanced approach to development
- Timeline presented is reasonable based on our global OSW experience for an emerging market but may be optimistic relative to other major Canadian infrastructure projects.
- Agree that employment opportunities are tied to need for infrastructure investment.

### Considerations:

- *Structured / managed approach to fisheries compensation would provide greater transparency and equity.*
- *Need for consideration of compensation for cultural losses.*
- *Seabed allocation should consider benefits for future generations and long-term industry sustainability (ie. qualitative factors) over short-term benefits (pure-monetary).*
- *Power procurement offers another opportunity to incentivize qualitative / socio economic benefits.*
- *Opportunity for Canada and Nova Scotia to lead the world by setting out new industry in a manner that supports reconciliation.*



## Environmental considerations

### General comments:

- Applaud committee's efforts to compile relevant data
- Further development of publicly available datasets would support industry, rightsholders and stakeholder as industry evolves

### Considerations:

- *Much of the area to be developed is ancestral Mi'kmaw lands and these communities should be considered in the development and management of the associated environmental and cultural data.*
- *Impacts to traditional fisheries and culturally sensitive species need to be adequately considered.*
- *Technology is changing rapidly – permitting and mitigation planning should define constraints but allow developers to determine technology options to meet requirements.*
- *Consider common approach to climate change assumptions and consider using collected site data from developers to calibrate climate models.*
- *Visual impacts can generally only be minimized from one perspective. How will the impacts on communities be balanced?*
- *Decommissioning requirements and developer plans should be developed and assessed with participation from Mi'kmaw communities. Decommissioning securities should be included in any developer requirements.*

## Socio-economic analysis

### General comments:

- Applaud committee's efforts to compile relevant data and consideration of not only direct but also indirect and inferred impacts
- GBA+ analysis is new for the OSW sector and we would anticipate limited data from historical projects / industry data.

### Considerations:

- *Delays in US offshore wind development may enhance NS grid export opportunity and offer potential to accelerate deployment timeframe.*
- *While Tier 1 manufacturing certainly has significant potential benefits, we don't see it as 'critical' to success or economic benefit with the OSW sector. There are substantial barriers to entry in this sector, including substantial investment requirements in bespoke facilities/tooling, expertise/experience, certification requirements and brand recognition. Attracting proven European OEMs is likely the most direct path to success*
- *Many socio-economic impacts may be mitigated / softened through regional approach to OSW development.*



# Infrastructure investments

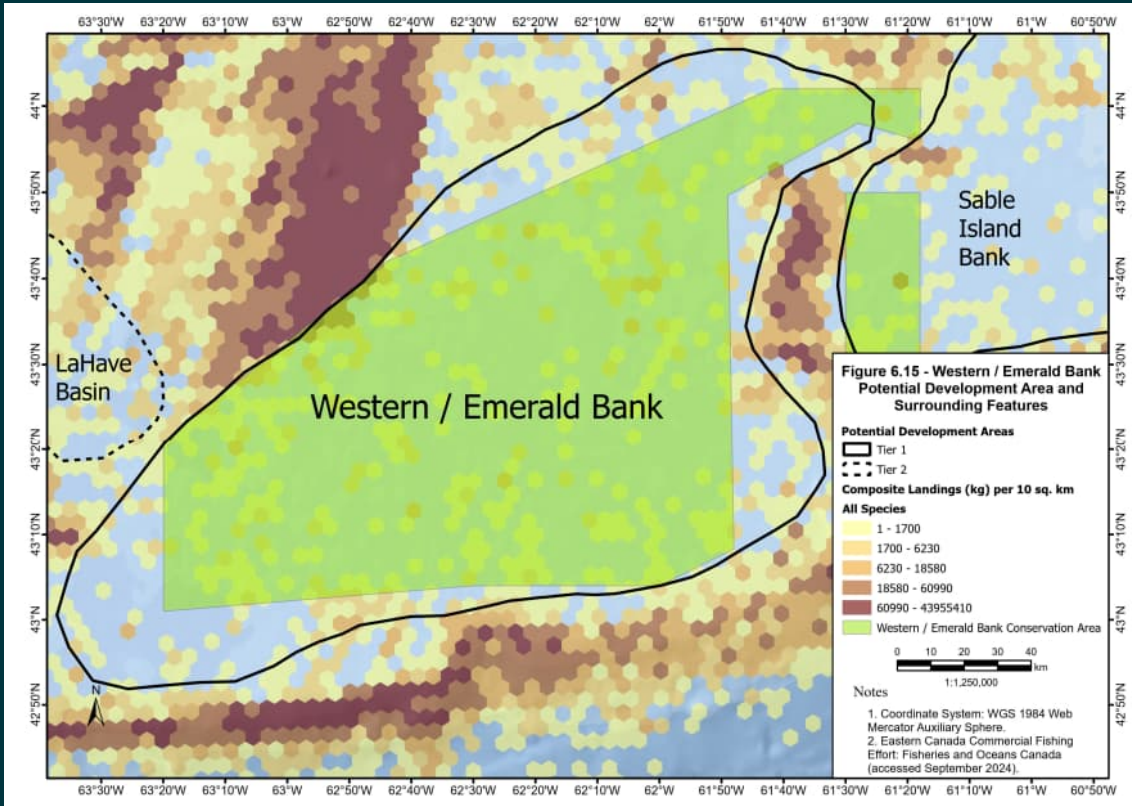
## General comments:

- Support committee's recommendation for seed funding to assess investment requirements for enabling infrastructure.
- Consideration of government led vs. industry led development options and impact to sector development and competitiveness.

## Considerations:

- *Further studies can refine port requirements to reflect development scenarios per leasing timeline, assessment of impacts of US administration change, engagement with developers with respect to proposed design / construction strategies and alignment of construction timelines.*
- *Generally, ports have need for early development funds (beyond seed funding) to bridge gap between the required start of engineering/planning works and the ability of OSW developers to commit. Privately owned ports will typically need c. 15 years of likely capacity pipeline to support project economics.*
- *Beyond the needed transmission lines, consideration of planned/managed vs sequential, independent interconnection designs for OSW projects can have significant impacts on long term costs, upfront investment requirements as well as environmental impacts.*

# Proposed development areas



## General comments:

- Expanded development areas allow developers to better optimize site selection, increases market competitiveness and reduces consumer price impacts.
- Inclusion of Tier 1 and Tier 2 areas positive as it provides industry and stakeholder insights into future potential development areas.

## Considerations:

- Western Emerald Banks (W.E.B) is groundfish protection zone closed to fishing. KMKNO considers the ground disturbance of an OSW there would be detrimental to the conservation objectives of the site.*
- 25km coastal buffer zone is within range of typical global standards. Consideration may be given to greater setbacks in more sensitive regions or those with greater elevation.*

## Comments on report recommendations

Theme	Consideration
1. Knowledge, Gaps and Necessary Research	<ul style="list-style-type: none"> <li>Engagement/participation of First Nations communities in collection and management of shared data (T1-3, T1-6) particularly as it relates to environmental conditions and cultural heritage/archeology.</li> <li>Agree with the need to fund Mi'kmaw Ecological Knowledge Studies. (T1-2)</li> </ul>
2. Socio-economic Feasibility and Consequences	<ul style="list-style-type: none"> <li>Follow-on port studies would benefit from clarification on proposed leasing timelines and analysis of impacts of recent US administration change on development scenarios and port capacity requirements. There may be need for additional funding beyond initial seed funding to bridge gap from required start of port development to likely OSW developer ability to make a port level commitment. (T2-1)</li> <li>A more detailed and specific Labour Market Analysis would benefit the industry, the public, and the Mi'kmaq of Nova Scotia. This work should include an element that focuses on the availability, readiness, and needs of Mi'kmaw people to be full participants in all aspects of OSW economic opportunity (e.g., from labour to trades to professional positions). (T2-4)</li> <li>Analysis into potential for allocation of apprenticeships to members of indigenous communities and engagement of indigenous owned businesses. (T2-5)</li> </ul>
3. Project Development	<ul style="list-style-type: none"> <li>KMKNO does not support the development of marine energy infrastructure in the Western / Emerald Bank Conservation Area and would request that this area be removed from the PDA. (T3-2)</li> <li>Specific plans for meaningful engagement with local First Nations communities and demonstration of engagement of indigenous owned businesses into supply chain development and labour development strategies should be integrated into initial bid evaluation criteria. (T3-3)</li> <li>Strength and regional suitability of coexistence plans with other marine users, particularly fisheries should also be considered in either the first or subsequent bidding rounds. (T3-3)</li> <li>Consider integration First Nations nominee into any evaluation committee. (T3-3)</li> </ul>

## Comments on report recommendations

Theme	Consideration
4. Coexistence and compensation	<ul style="list-style-type: none"> <li>• While the need for compensation for economic losses is well understood, losses related to cultural / traditional fisheries and use of the marine space need to be addressed as well. Recognizing that this is a complex issue, further consultation with FN is required as development progresses to determine appropriate compensation structures. (T4-1, T4-2)</li> <li>• Acknowledge suitability of the managed compensation model to ensure equitable allocation of compensation funds. (T4-3)</li> </ul>
5. Cumulative effects	<ul style="list-style-type: none"> <li>• Acknowledge the importance of the assessment of cumulative impacts and the necessity of fulsome engagement with Mi'kmaw people in these assessments. (T5-1)</li> </ul>
6. Governance	<ul style="list-style-type: none"> <li>• Supportive of inclusion of Mi'kmaw nominee on CNSOER board as a measure to support ongoing engagement of First Nations communities. (T6-2)</li> <li>• Supportive of recommendation for project-specific impact assessments for all OSW projects. (T6-3)</li> <li>• Funding support may be required to enable all vessels to be equipped with any mandatory or recommended vessel tracking system. (T6-4)</li> </ul>
7. Education and training	<ul style="list-style-type: none"> <li>• Engagement of the Mi'kmaq of Nova Scotia in the OSW sector would be enhanced through the development of scholarships, bursaries and apprenticeships targeted at Mi'kmaw communities. (T7-1, T7-2)</li> </ul>



**Thank you.**