

Eastern Ontario Leadership Council Agenda



Thursday, June 5, 2025 – 1:00 PM a.m.

Join Zoom:

<https://us06web.zoom.us/j/88173554688?pwd=bDr7jkSZaRjb39TKd2u5M55RUoJVbe.1>

- 1 **Call to Order/Welcome**
- 2 **Declaration of Conflict of Interest**
- 3 **Adoption of the Agenda**
 - 3.1 **Recommended Motion**

"That the agenda of the June 5, 2025, Board of Directors of the Eastern Ontario Leadership Council Meeting be adopted as circulated."
- 4 **Report of the Project Coordinator - Kathryn Wood**
 - 4.1 [EOLC Regional Economic Development Strategy 2025](#)
- 5 **Verbal Report of the Finance Committee - Chair Maureen Adams**
 - 5.1 [EOLC Financial Summary - March 31, 2025](#)
- 6 **Verbal Reports from the Working Group**
 - 6.1 Integrated and Intelligent Transportation Systems – Maureen Adams
 - 6.2 Innovation – Cyndy Palleske
 - 6.3 Workforce Development and Deployment – Craig Desjardins
 - 6.4 Infrastructure Sub-Committee - Jason St. Pierre
[EOLC Infrastructure Sub-Committee Meeting Minutes 2025-03-20 \(1\)](#)
[Infrastructure Sub-Committee -Meeting Minutes 2025-02-04 \(1\)](#)
- 7 **Verbal Partner Update**
 - 7.1 Eastern Ontario Wardens' Caucus
 - [EOWC Updated Tariff and Trade Data](#)
 - [EOWC Electrical Equipment Sector Data](#)
 - [EOWC Resins and Rubber Sector Data](#)
 - [EOWC Transportation Sector Data](#)
 - [EOWC Residential Construction Sector Data](#)
 - [EOWC Agriculture Sector Data](#)

- 7.2 Eastern Ontario Mayors' Caucus
- 7.3 Ontario East Economic Development Commission
- 7.4 Community Features Eastern Ontario (CEFO) Network
- 7.5 Eastern Ontario Regional Network

8 Consideration of By-Laws

9 Date of the Next Meeting

To be determined.

10 Adjournment

10.1 **Recommended Motion**

"That the June 5 meeting of the Board of Directors of the Eastern Ontario Leadership Council be adjourned".



An example of an image generated by Reve AI



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Acknowledgements

The EOLC would like to acknowledge and thank our facilitator, Suzanne Gibson, for her services over several months in engaging our Board and supporting team as well as external stakeholders in creating this Regional Economic Development Strategy.

EOLC Mandate Statement

The EOLC engages the public, private and not-for-profit sectors in designing and implementing initiatives with region-wide application that develop, scale and share innovative approaches to strengthen Eastern Ontario's regional economy. By empowering partners through forward-looking research, analytics and idea-testing projects, we are positioning this region as a hotbed of innovation in for tools, policies and business models that build resilience and drive sustainable growth.

EOLC Value Proposition

On your behalf, the Eastern Ontario Leadership Council looks beyond today's horizon, identifying and tackling the most significant, complex economic development challenges and opportunities the region faces in the years ahead.

We respond boldly, shouldering risks too great for individual stakeholders. We access rare expertise to uncover and share insights, propose ground-breaking ideas, develop and deliver practical solutions; and share breakthrough thinking and results far and wide.

By leveraging municipal investments and collaborations that attract additional investment, the EOLC multiplies the impact of its work in support of the regional economy, putting partners and stakeholders ahead of the curve in the pursuit of new opportunities.

Stakeholders wishing to learn more about these opportunities are invited to reach out to the EOLC Project Coordinator at contact@eolc.info

1. Executive Summary

This Regional Economic Development Strategy for Eastern Ontario is the third produced by the [Eastern Ontario Leadership Council](#) and is based on a **newly-refined vision** for the region, a refreshed **mandate** and **value proposition** for the EOLC. This Strategy drew upon insights and input from the EOLC Board and its supporting team as well as public and private stakeholders from across the region.

This 2025-2029 strategy builds on projects carried out in the 2019-2024 strategy, adding more **recent economic analysis and late-breaking developments** related to changing international and interprovincial trade relationships as well as rapidly-evolving tariff regimes. It is focused on **four priorities**: Workforce Development, Deployment and Housing; Transportation Networks and Services; Infrastructure for Business and Economic Development and Innovation Ecosystem and Supports.

Four Priorities:

- Workforce Development, Deployment & Housing
- Transportation Networks and Services
- Infrastructure for Business and Economic Development
- Innovation Ecosystem and Supports

Implementation of the Strategy is guided by an **opportunity evaluation methodology** that assesses each idea that comes forward, determines whether it warrants a specific project to move it forward, the appropriate role for the EOLC to play and explicitly contemplates multiple options for handing off development and implementation to partners and other stakeholders. Collaborations and partnerships are an explicit principle underlying the EOLC's *modus operandi* --- the way the EOLC carries out its responsibilities and interacts with other organizations.

Ongoing governance of the EOLC begins with a seven-person Board and supporting staff team, with three targeted Working Groups and an overarching innovation committee implementing an assigned mandate **with short, medium and long-term initiatives** to guide their deliberations. In addition to overseeing the Working Groups and Committee, the Board itself oversees several broad issues (described herein as “corporate initiatives”) to which Working Groups and Committee also provide support.

Six Principles of Implementation

- Work is regional in scope and related to economic development
- Relies on evidence-based decision-making
- Shares risk and financial responsibility
- Limited/no post-project responsibilities
- Two-layer governance structure (Board and Working Groups)
- Based on collaborations/partnerships.

Working Groups will draw on the expertise of organizations from across the region to develop and manage projects that contribute to fulfilment of the EOLC's **aspirational goal** for each of the four priorities.

The three main ways in which the EOLC expects to operationalize its work are: a) **mapping regional assets and gaps**; b) **undertaking pilot and/or demonstration projects**; and c) **playing a convening role on priority issues and opportunities**.



The five-year Strategy is set out in more detail in Sections 8 and 9, with the following chart providing an overview of the Aspirational (5-Year) Goal associated with each priority and several examples of initiatives to be undertaken immediately (the next 1 to 2 years).

Priority	Aspirational (Five-Year) Goal	Examples of Assigned Short-Term Initiatives
Workforce Development, Deployment & Housing	A regional workforce that is of sufficient size, literacy and skill level, technology-enabled, well-housed, distributed and/or mobile to address foreseeable in-region needs (e.g. five years out).	<ul style="list-style-type: none"> • Update research on regional labour markets and cost of living analysis, including housing • Convene stakeholder meetings on critical shortages and reskilling needs • Leadership to training & education sectors on labour market shortages and reskilling needs
Transportation Networks & Services	A multi-modal transportation system capable of moving people and goods safely and efficiently across the region and beyond. This explicitly includes use of new technologies and processes in logistics and transportation-related asset construction, maintenance and traffic flows.	<ul style="list-style-type: none"> • Map existing and planned transportation infrastructure, and commuter travel patterns • Explore opportunities for air transportation and cargo-focused ports • Identify opportunities for deployment of new technologies in transportation (EVs, CAVs, platforms supporting logistics and transportation)
Infrastructure for Business & Economic Development	Eastern Ontario is known as a region that has integrated, financially sustainable infrastructure in place to support above-average economic growth and community vitality.	<ul style="list-style-type: none"> • Continued attention to digital infrastructure, including data centres • Advance new solutions for environmental infrastructure, esp. for housing • Review/identify energy-related opportunities
Innovation Ecosystem & Support	An innovation culture that is well-instilled across the region and supported by a tightly-coupled innovation ecosystem.	<ul style="list-style-type: none"> • Refresh 2016 Regional Innovation Ecosystem Mapping report • Develop digital dashboard for regional economy
Corporate Initiatives	Full implementation of the 2025-2029 Regional Economic Development Strategy	<ul style="list-style-type: none"> • International and interprovincial trade • Advocacy support • In-Region communications for EOLC



2. Background to the Development of the Strategy

Created in 2013, the [Eastern Ontario Leadership Council](#) developed and adopted its first regional economic development strategy in 2014, then updated it in 2019. Two years later, the EOC went from an informal body operating under the EOWC and EORN to a separate incorporated body with operating costs coming from the EOWC and the EOMC. In addition to operating cost support from the municipal sector, the EOLC secures project-related funding from other levels of government.

In 2024, the seven-person Board of the EOLC retained professional facilitation (Suzanne Gibson) to lead the Board through three extensive strategic planning workshops, supplemented by a series of interviews with external stakeholders. The Board also held a special meeting in January of 2025 to consider how export tariffs by the U.S. might affect the regional economy.

The EOLC Board brings together leadership from five regionally-minded organizations in Eastern Ontario to address regional economic development issues and opportunities:

- Eastern Ontario Wardens Caucus ([EOWC](#))
- Eastern Ontario Mayors Caucus (EOMC)
- Eastern Ontario Regional Network ([EORN](#))
- Ontario East Economic Development Commission ([OEEDC](#))
- Community Futures Eastern Ontario ([CFEastern Ontario](#)).

Through the 2019-2024 period, the EOLC Board pursued opportunities to address challenges brought about by the pandemic as well as housing affordability and availability. Through three Working Groups, the EOLC undertook multiple projects (described in [Section 3](#)) to help stakeholders respond effectively to these challenges. These projects generated a first-of-its-kind regional capability to understand the impacts of the COVID-19 pandemic, a 'no bells and whistles' version of a labour market analytics platform, detailed analysis of regional commuting patterns, a self-guided economic resilience strategy tool, and development of a now-commercial municipal public works permitting system called Permit Central.

In developing this strategy, the EOLC Board has benefited from strategic planning processes carried out by the EORN and the EOWC. For example, EORN's 2024-2028 plan includes enhancing regional growth through innovative and value-added [services](#) focused on the region's connectivity and development needs. In its [2024-2027 plan](#), the EOWC has identified infrastructure, housing, healthcare, **economic resilience** and strengthen organizational impact as its strategic priorities. The EOLC anticipates that its strategic plan will intersect with and support its partner organizations' work on behalf of the region.

3. Work Undertaken by the EOLC in the 2019-2024 Period

An early stage of the EOLC Board's strategic planning deliberations for the 2025-2029 was reviewing its initiatives during and following the COVID-19 pandemic. The five major projects undertaken in that period were all completed within budget and delivered significant outcomes of value to regional stakeholders and funders:

- ***Economic Modelling on the Economic and Labour Market Impact of the COVID-19 Pandemic:*** Undertaken in concert with Limestone Analytics (an Ontario-based company); quantified the near-term [labour market and GDP impacts](#) of the pandemic and gave Limestone Analytics a springboard to take their modelling expertise to other jurisdictions in Canada and abroad.
- ***Business Analysis for Commuting Services in Eastern Ontario:*** Initial analysis of commuting patterns across the region, based on “laboursheds”, including bidirectional commuter volumes across municipalities (Census Subdivisions) and tracking of (public domain) Google datasets; assessment of the challenges of creating sustainable urban-rural commuter services, and upfront financial support for [pilot projects](#) based on different business models.
- ***Recovery and Resilience of a Regional Labour Market:*** Uncovered the [top 15 factors](#) influencing local/regional ability to minimize the initial impact of significant economic and labour market shocks and enhance recovery and the ability to “bounce forward”. This work is summarized as a Resilience Index in a self-guided digital workbook.
- ***Labour Market AI Project:*** Created a basic/“minimum viable product” easy-to-sue [labour market platform](#) gives users the ability to generate labour market profiles, understand high and low demand occupations, skills gaps, and skills-based comparisons of occupations that could help workers migrate to new jobs or sectors. The platform is now being re-assessed to determine how to expand its usefulness in a new era of labour market volatility and one in which a broader range of workforce factors are affecting decision-making.
- ***One-Window Permitting Project*** (for Public Works/Transportation): Led directly to a commercial public works permitting product known as [Permit Central](#), operated by Transnomis Solutions Inc. (an Ontario-based company), that works for single and two-tier local governments and integrates Municipal511 within the platform.

4. Basic Profile of the Regional Economy

Parameter/Indicator	Value (Most Recent Year)
Population	1,314,200 (2023)
Places of Employment (includes with/out employees)	117, 058 (June 2024)
Change in Places of Employment since Dec. 2021	+14.3% (all bus. Sizes)
Sectors with Largest Numbers of Jobs (2024)	
1. Healthcare and social assistance	90,898
4. Manufacturing	48,561
5. Accommodation and food services	46,329
7. Construction	45,734
Sectors with Highest Sales (2022)	
1. Manufacturing	\$43,901,928,197
2. Healthcare and Social Assistance	\$ 8,769,722,638
3. Retail Trade	\$ 5,325,889,993
4. Transportation and Warehousing	\$ 4,748,433, 086
5. Professional, Scientific and Technical Services	\$ 4,712,726,608
6. Educational Services	\$ 4,588,525,457
7. Agriculture, Forestry, Fishing and Hunting	\$ 4,397,250,467
Jobs	581,600 (2023)
Exports (out of region, not necessarily international)	\$64.6 Billion (2022)
Major Exports – products only, not funded services (2022)	
1. Resins, synthetic rubber & artificial fibres	\$4,925,190,911
7. Other electrical equipment & comp. manuf.	\$1,958,389,991
8. Farms	\$1,813,984,943
9. Basic chemical manufacturing	\$1,588,234,794
10. Dairy product manufacturing	\$1,396,169,028
11. Motor vehicle parts manufacturing	\$1,242,128,651
12. Alumina and aluminum production, processing	\$1,064,900,736
Imports (into region, not necessarily from abroad)	\$75.0 Billion (2022)
Major Imports – products only, not funded services (2022)	
1. Farms	\$2,403,033,825
2. Resins, synthetic rubber & artificial fibres	\$2,188,080,209
3. Petroleum and coal product manufacturing	\$2,090,200,544
4. Motor vehicle manufacturing	\$1,897,445,219
5. Oil and gas extraction	\$1,876,420,868
6. Basic chemical manufacturing	\$1,534,425,716
7. Computer systems design and related services	\$1,219,893,557
8. Residential building construction	\$1,121,381,154
9. Wireless and wireless telecom carriers	\$1,060,646,607

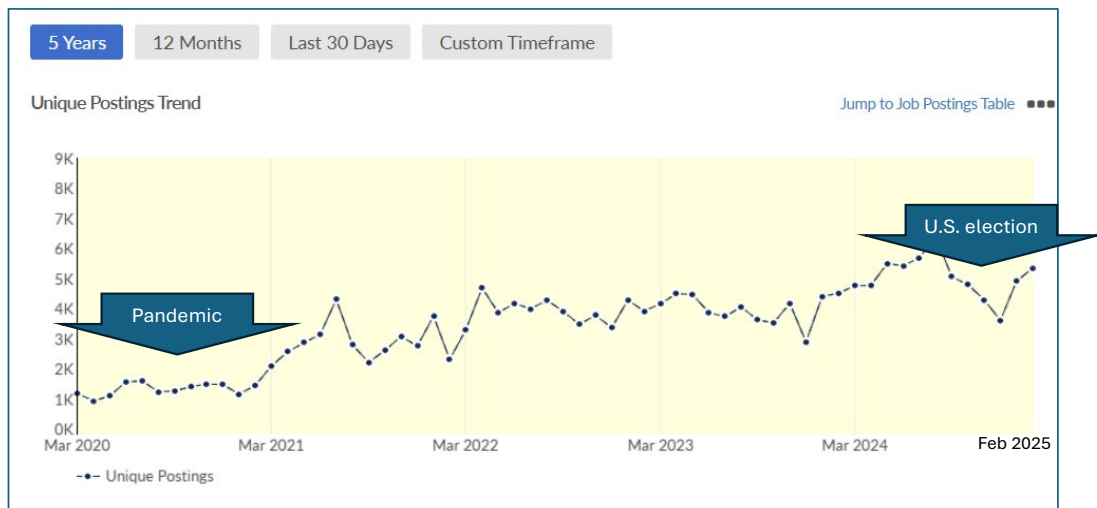
Source: Lightcast Analyst Platform as at March 31, 2025

5. The Changing Context for Economic Development

In the past five years, the Eastern Ontario economy has witnessed dramatic changes (ex. the COVID-19 pandemic) as well as the unfolding of long-term trends (ex. demographics/aging). As this Strategy was being finalized, new events such as disrupted/reset international trade relationships and tariff regimes began to unfold.

This turmoil, combined with ongoing housing market and inflation challenges, is creating enormous uncertainty for public and private decision-makers --- on all forms of capital investment, market focus, labour force and related re/upskilling, and the pursuit of innovation. Both municipal governments and business/industry leaders are watching and working with provincial and federal governments to align their choices and investments for maximum positive impact across the region.

One way that the EOLC expects to support the region's decision-makers over the next five years is through baseline and predictive data analysis, pattern and trend identification, with an emphasis on leading economic indicators. The EOLC expects to build and share a regional economic dashboard that will provide the region's decision-makers with the best available information on key aspects of regional performance. Month-by-month data on job postings, for example, will provide an early indication of employers' staffing intentions as well as labour market volatility. As shown below, this information can be set in an historical context to further inform decisions.



Source: Lightcast Analyst Platform - March 2025



6. EOLC Core Guidance Statements

Through its own deliberations as well as feedback from its Working Groups and external stakeholders, the EOLC Board has reviewed and affirmed the following 10-year Vision for the region. The Vision acknowledges the landscape in which we live and work, the many assets we have to work with, and the way we choose to move forward together. In this sense, the Vision sets the stage for the EOLC to determine what specific roles it will play in fulfilling the region's promise.

6.1 A 10-Year Vision for the Region

Eastern Ontario: Responsive. Resourceful. Resilient.

Eastern Ontario is responding to a changing world, attracting and expanding economic opportunity, stimulating entrepreneurial success, enhancing the livability of our communities, and strengthening our collective resilience.

Well-known for our skilled, adaptable and diverse workforce, the people and organizations across Eastern Ontario are collaborative by nature, probing the limits of new ideas and putting the best of them to the test --- all in the service of amplifying domestic and global economic vitality and growth.

Newcomers join long-time residents and enterprises in becoming part of our well-developed ecosystem of business, transportation, healthcare, technology, research and educational infrastructure.

The region's outstanding quality of life across our vibrant, diverse rural and urban communities is set amidst deeply-rooted respect for our history, heritage and shared natural environment.

Through innovation, inclusion and partnerships, the Eastern Ontario Leadership Council is a leading catalyst in bringing this vision to life. We are responsive, resourceful and resilient.

6.2 Mandate Statement for the EOLC

Both the Board and EOLC stakeholders noted that there has been limited awareness of the mandate statement (as set out in the organization application for incorporation)¹ and that it needs to be updated.

The following Mandate Statement was among several presented to the EOLC Board in February of 2025 and was **approved by the Board in April of 2025**. It will replace the earlier version effective immediately.

EOLC Mandate Statement:

The EOLC engages the public, private and not-for-profit sectors in designing and implementing initiatives with region-wide application that develop, scale and share innovative approaches to strengthen Eastern Ontario's regional economy. By empowering partners through forward-looking research, analytics and idea-testing projects, we are positioning this region as a hotbed of innovation in for tools, policies and business models that build resilience and drive sustainable growth.

Does this adequately address diversification, entrepreneurship, agriculture, (feedback from external stakeholders)

¹ **EOLC Mandate as submitted in its application for incorporation:** *The Eastern Ontario Leadership Council has been established to act in a guidance and coordination role for foundational economic development activities in the region. In this role, the EOLC will help ensure that resources are in place to support local economic development activities by providing resources, data and research that will improve the overall business climate in Eastern Ontario. The EOLC will coordinate opportunities with partners at the Provincial and Federal levels of government, plus the education and innovation sectors.*

6.3 The EOLC Value Proposition

The objective of a value proposition is to describe for partners, funders and other stakeholders what an organization's unique contribution is to a geographic area and/or market. It is intended set out the specific services to be undertaken --- and the beneficiaries so that others can determine the relative value and importance of those roles and services, and the degree to which they wish to provide concrete support for the originating organization.

EOLC Board discussions, as well as its consultations, suggested that the EOLC's Value Proposition should be based on:

- Focusing on shared economic challenges and opportunities
- Adopting a future orientation, not present-day
- Focusing on breakthroughs/leading edge initiatives
- Being a conduit for risk-sharing on behalf of multiple smaller organizations
- Leveraging impact/scaling solutions (e.g. with other funding and/or collaborators)
- Putting our stakeholders in an advantageous position, preferably with a competitive advantage.

It is understood that the way in which the EOLC lives its value proposition will differ across stakeholder groups. For instance, in one situation, the EOLC might provide data or other support to advocacy efforts, For other stakeholders, the EOLC might develop undertake tool development projects then share the deliverables with those who will use it for their own decision-making. The following Value Proposition should be well communicated to support broad engagement across the region.

EOLC Value Proposition

On your behalf, the Eastern Ontario Leadership Council looks beyond today's horizon, identifying and tackling the most significant, complex economic development challenges and opportunities the region faces in the years ahead.

We respond boldly, shouldering risks too great for individual stakeholders. We access rare expertise to uncover and share insights, propose innovative ideas, develop and deliver practical solutions; and share breakthrough thinking and results far and wide.

By leveraging municipal investments and collaborations that attract additional investment, the EOLC multiplies the impact of its work in support of the regional economy, putting partners and stakeholders ahead of the curve in the pursuit of new opportunities.



6.4 The Roles of the EOLC in Regional Economic Development

As in the 2014 and 2019 regional economic development strategies for Eastern Ontario, this Strategy identifies the roles that the EOLC expects to play in the years ahead. While some of these roles will be undertaken at the Board level, most will be addressed by Working Groups and/or other EOLC committees, delegated to partners with seats at the EOLC Board table or other stakeholders in the region. In some cases, the EOLC may decide against any involvement at all. Examples would be issues that are clearly local not regional in nature or issues that are not core to the mandate of the EOLC. This delineation of roles allows the EOLC to focus on a limited number of priorities. Overall, the roles of convening, mapping assets and gaps, and undertaking pilot/demonstration projects are expected to be central EOLC roles in implementing the strategic plan.

Role	EOLC Board	EOLC Working Groups/Committees	Delegated Partners
<ul style="list-style-type: none"> Forum for discussion of regional economic development issues 	✓	<ul style="list-style-type: none"> If delegated from/ requested by Board 	<ul style="list-style-type: none"> If delegated from/ requested by Board
<ul style="list-style-type: none"> Share information on challenges and opportunities 	✓	✓ (On specific priorities/issues with their mandate)	✓ (On specific priorities/ issues with delegated authority)
<ul style="list-style-type: none"> Undertake very focused advocacy (under EOLC banner) 	✓ <ul style="list-style-type: none"> If requested by EOWC and EOMC 	<ul style="list-style-type: none"> Only if requested by EOWC and EOMC and approved by Board 	<ul style="list-style-type: none"> Only if requested by EOWC and EOMC and approved by Board
<ul style="list-style-type: none"> Convene meetings on specific issues/ priorities 	<ul style="list-style-type: none"> Limited to specific issues/ projects with Board-level oversight 	✓ <ul style="list-style-type: none"> May include stimulating partnerships with other organizations 	✓ <ul style="list-style-type: none"> May include stimulating partnerships with other organizations
<ul style="list-style-type: none"> Seek out financing/ funding opportunities 	<ul style="list-style-type: none"> Limited to specific issues/ projects with Board-level oversight 	✓ (with expectation of return to Board or risks/commitments from EOLC)	✓ (with no expectation of risks/ commitments/support from EOLC)



Role	EOLC Board	EOLC Working Groups/ Committees	Delegated Partners
<ul style="list-style-type: none"> Provide regionally-relevant research and analytics, share 'business intelligence' across the region (may include researching/ mapping regional economic development assets and gaps) 	✓	✓ (Request/undertake on specific priorities/issues with their mandate)	✓ (Request/undertake on specific priorities/issues with delegated authority)
<ul style="list-style-type: none"> Undertake specific innovation projects to share risk across the region (may include testing and piloting innovative responses with regional scale-up opportunity) 	<ul style="list-style-type: none"> Limited to specific issues/ projects with Board-level oversight 	✓ <ul style="list-style-type: none"> May be undertaken directly by a Working Group or by the Innovation Committee May include stimulating partnerships with other organizations 	✓ <ul style="list-style-type: none"> May include stimulating partnerships with other organizations
<ul style="list-style-type: none"> Share information on EOLC priorities, actions, successes 	✓	✓ (On specific priorities/issues with their mandate)	✓ (On specific priorities/issues with their mandate)

6.4 Principles and Partnerships

Principles

The EOLC operates on the basis of six core Principles, all of which will be used as filter criteria for the EOLC's engagement in/support on any specific issue or project:

1. Any engagement, formal positions, funding applications or projects undertaken will be **regional in scope and related to economic development**. "Regional in scope" means applicable to most, if not all, municipalities in Eastern Ontario or a competitive process open to all municipalities or other stakeholders across the region. In all cases, there will be an intent that deliverables are shared with other municipalities and stakeholders at no/low cost. The EOLC may retain any intellectual property associated with its work but could license it to one or more parties.
2. Research and analytics work, including but not limited to asset/gap mapping, is undertaken with the specific intent of **supporting evidence-based decision-making** at both local and regional levels as well as informing partners' and/or stakeholders advocacy efforts.
3. In much of what the EOLC does --- especially in more innovative projects, it will seek to **share risk across municipalities and undertake projects that would be too expensive or too risky** for individual partners/stakeholders to undertake on their own.
4. The EOLC will **only undertake projects that do not require significant post-project maintenance/aftercare** unless a business case is presented making the case for future revenue streams that can fund the maintenance/aftercare or there are national security and/or privacy and confidentiality considerations requiring long-term oversight. Otherwise, the expectation is that the EOLC may undertake preliminary work but will ultimately hand off products/deliverables to other organizations with related expertise and capabilities.
5. The EOLC works within a governance model that emphasizes **strategy and partnership development at the Board level** (in accordance with the EOLC Bylaws and governance documents), with an **implementation model based on Working Groups and/or committees** for each specific priority. In the latter case, a Working Group brings the appropriate members into the Group (based on specific expertise, experience, geographic representation, willingness/ability to work on region-level projects or other criteria that the Working Group might establish.)
6. The EOLC strives to work within a **collaborative, partnership-based model** that maximizes engagement and utilization of talent, capabilities and other resources across in-region organizations that share its vision for the region and willingness to participate in initiatives that address region-wide issues and opportunities. This approach expressly includes the pursuit of collaborations or formal partnerships with municipal, provincial and federal governments, the private sector, institutions, the not-for-profit sector and First Nation governments.



Potential Partners

Through its strategic planning process, the EOLC has identified many potential partners through which implementation of its 2025-2029 strategy might unfold. Additional partners may be added to this list. The EOLC will also be drawing from this list to expand the breadth of expertise and insight available through its Working Groups.

Potential Partners

(beyond organizations represented at the EOLC Board table)

- Ontario ministries of Economic Development, Job Creation and Trade; **Transportation, Municipal Affairs and Housing**
- Education Sector (*esp. secondary and post-secondary*)
- FedDev Ontario and **other departments of the Government of Canada**
- Municipalities
- **First Nations governments**
- Economic Developers Council of Ontario
- Ontario Centres of Excellence
- Ontario Centre of Innovation
- Regional Innovation Centres
- Local Community Futures
- Industry/**Sectoral** Associations
- Chambers of Commerce
- Business Improvement Areas (BIAs)
- **Financial institutions and agencies**
- Vendors of Record
- **Labour Market Intermediaries**
- Third-sector and non-profits connected to economic development

7. Four Priorities for the EOLC's Attention

Through multiple strategy sessions as well as consultation with Working Groups and external stakeholders, the EOLC Board identified four priorities that will shape its work over the next decade:

- **Workforce Development and Housing:** Workforce/labour has been a top priority of the EOLC since 2014 and was the focal point of three provincially-funded projects during the COVID-19 pandemic. Labour markets, and Eastern Ontario's current and future labour force require significant attention in the face of ever-changing demographics, fluctuations in in-migration and international students, major changes in the higher education and skills training landscape, ongoing introduction of automation, technology augmentation, and AI deployment, and international trade discussions and corporate location decisions for which quality and numbers of the labour force are key. In addition, ever-escalating construction costs and a serious shortage of housing for current and potential residents (across all income groups) has introduced a serious additional challenge to ensuring that the region attracts and retains the workforce it needs in the decade ahead. As a result, the EOLC Board has reaffirmed its commitment to workforce development and incorporated workforce housing in that priority.
- **Transportation:** Movement of both people, especially workers/commuters, and goods (e.g. freight) continue to be a priority of the EOLC. As places of employment, housing and priority markets continue to change, the EOLC is focused on maintaining a watchful eye on the region's transportation network (road, rail, marine, air) so that service industries and goods-producing industries (e.g. manufacturing, agriculture, forestry, etc.) are well-connected to markets near and far. Part of this connectivity is process-focused such as accelerated permitting processes, monitoring transportation flows, and associated safety considerations. As Canada seeks to diversify its import and export markets, the region must ensure that it can keep pace. At the same time, Eastern Ontario stakeholders expect to keep pace with, if not lead, the implementation of new technologies in the transportation sector, including but not limited to electric and/or autonomous vehicles.
- **Infrastructure:** Identification of this priority reflects a significant broadening the EOLC's scope of interest beyond digital infrastructure (the focus since 2014). This shift recognizes that there have been significant accomplishments over the past decade (EORN's original broadband project and a follow-on project to address gaps in mobile/cell services) and that new infrastructure-related challenges have emerged related to environmental services, energy supply, transportation assets, and the business models, financing and process/permitting tools required to address them.

Without significant movement on the full range of infrastructure requirements, the economic development of the region will be severely constrained.

- **Innovation.** Innovation is viewed as an overarching priority, embedded in the other three Working Group mandates, and is expected to breath life into the aspirations set out in the Mandate Statement and Value Proposition. In 2019-2024, the EOLC undertook multiple provincially-funded projects that **developed new tools** (examples: a “one window” permitting system for public works; a Resilience Index to help communities and the region identify what issues to work on to support risk mitigation and adaptation in the face of economic shocks) or created **new ways of understanding** long-standing issues (e.g. labour market data and analytic tools, commuter pilot projects). Although there is general agreement that innovation is part of each of the other three inter-connected priorities, the **creation of a committee-based forum** in which the EOLC could analyze and recommend action on prioritized innovation projects was also supported. Early conversations suggest that there are multiple cross-cutting innovation-focused projects on which the EOLC might focus.

“The EOLC is a remarkable organization that has successfully delivered great initiatives. It sees the big picture and the interdependencies; it has leveraged partnerships and built great synergies. But it needs to focus. It needs to determine the first best thing to do.”

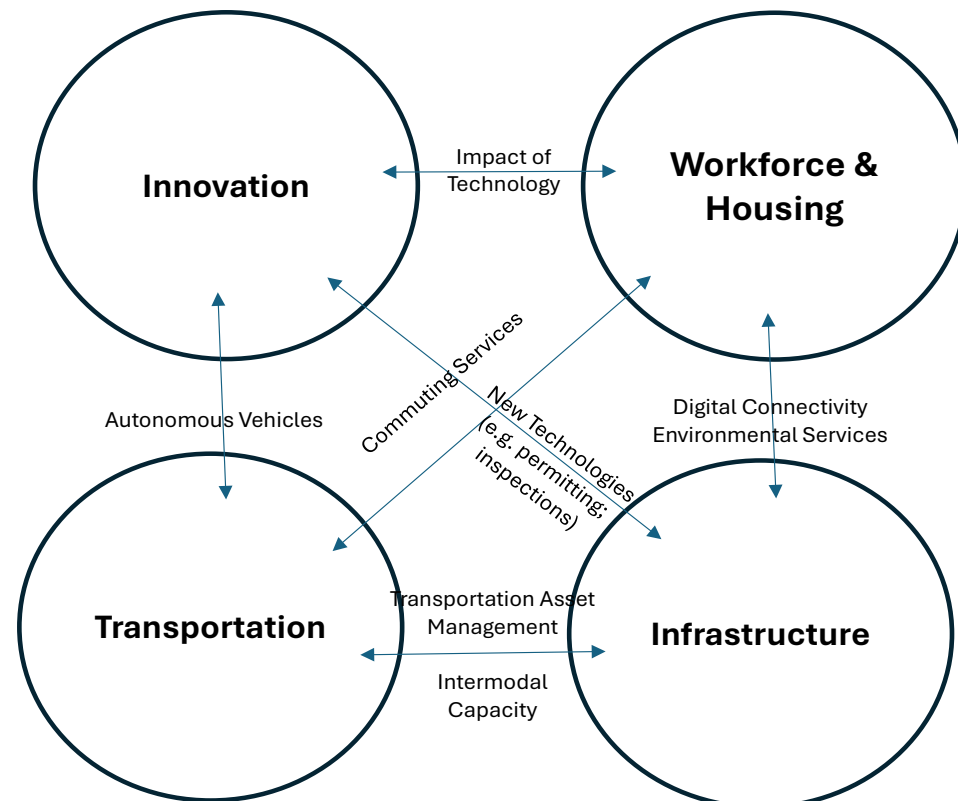
Comment from External Stakeholder

A Newly-Emerging Need for Direct Board-Level Engagement: As the EOLC’s strategic planning process was unfolding, it also became clear that there are newly-emerging issues that need immediate Board attention but that may not fit neatly into one of the four identified priorities. In the 2019-2024 period, the pandemic was an example of a newly-emerging issue; the impact of the pandemic was a standing item on the Board agenda for more than a year. Another example was the development of the Resilience Index.

In the 2025-2029 period, international and interprovincial trade promises to challenge business and governmental decision-makers alike. Both export and import intensive sectors (examples: agriculture, manufacturing, forestry, steel and aluminum, construction, **and tourism**) are likely to require both a cross-priority approach, including innovation, as well as direct/hands on attention at the EOLC Board table. Section 6.4 of this report describes the detailed mandate, direction and timelines for work by each Working Group and those issues to be addressed directly by the Board.

7.1 Four Priorities: They Are Interconnected

In selecting priorities for the next five years (and likely beyond), the EOLC noted that their top four priorities are interconnected. They cannot be addressed with a silo-based approach. For that reason, as the Working Groups are tasked with taking on near-term projects, they must look to/interact with other working groups tackling related aspects of the same overall issue. Examples are set out below but this is far from an exhaustive presentation.



... and supported by a municipally-led Board of Directors



7.2 Approach to Implementation

In considering how to implement the new Regional Development Strategy, the EOLC revamped its Working Group structure, adding a new one and expanding the mandate of another. The approach to assigning specific priorities is to keep each Working Group focused on its historical mandate with expansion and reprioritization within the mandate. Recommendations are included to facilitate collaborative work across the issues and the Working Groups.

Theme	Assignment Recommendations (Who Leads?)
<i>Workforce Development & Deployment (2019)</i>	<ul style="list-style-type: none"> Retain existing mandate and broaden to include workforce housing; focus on construction, healthcare
Workforce Housing (new)	<ul style="list-style-type: none"> Assign leadership/include in broadened mandate for Workforce Development and Deployment
Infrastructure (new) – All types except digital infrastructure	<ul style="list-style-type: none"> Create a new Working Group with a long-term mandate; includes new business, financial models
<i>Digital Infrastructure (2019)</i>	<ul style="list-style-type: none"> Retain existing approach (leadership by EORN); use cross-appointments within EOLC to ensure collaboration re: infrastructure and housing
<i>Integrated Intelligent Transportation Systems (2019)</i>	<ul style="list-style-type: none"> Retain existing mandate; use cross-appointments within EOLC to ensure collaboration re: infrastructure and housing
<i>Innovation (formerly Technology Integration and Innovation – 2019)</i>	<ul style="list-style-type: none"> Task the Innovation Committee to support innovation in other Working Groups and across EOLC generally; use cross-appointments within EOLC as conduits for collaboration
<ul style="list-style-type: none"> Additional Board-level responsibilities: a) Advocacy Plan b) common messaging across partner organizations c) tracking action on regional strategy; EOLC dashboard and indicators 	

7.3 Formal Names of Working Groups/Committee:

In light of the mandates identified for each of the three Working Groups and the overarching innovation committee, these structures will be known as:

- **Workforce Development, Deployment and Housing Working Group**
- **Transportation Networks and Services Working Group**
- **Infrastructure for Business and Economic Development Working Group**
- **Innovation Ecosystem and Supports Committee.**

All four groups will be expected to report to the EOLC Board at each meeting.

7.4 Priority and Mandate: Workforce Development, Deployment and Housing

Aspirational Goal: A regional workforce that is of sufficient size, literacy and skill level, technology-enabled, well-housed, distributed and/or mobile to address foreseeable in-region needs (e.g. five years out).

Strategies and Responsibilities

- Develop a solid understanding of the region’s labour supply, labour demand and where the gaps are --- not just today but five years out
- Develop and deploy creative multi-generational talent retention strategies (e.g. youth, new graduates, mid-career, second career etc.)
- Develop and deploy talent attraction and resettlement strategies (newcomers from intra-provincial, inter-provincial and international sources)
- Ensure that the in-region workforce is technology-enabled, trained and supported whether working from home or in a designated workplace
- Provide leadership in assessing the role(s) of technology in the workplace especially AI – job augmentation; displacement vs. filling “vacancies”
- Undertake research to understand the role of “beyond the job” factors in work-life decisions and influence on productivity and job/career aspirations
- Work with training and education organizations to target occupations/skill sets that are likely to be in high demand/short supply across the region by 2030 if not already present Re-skilling/upskilling and equitable access to same
- Provide leadership in convening partners to create truly affordable communities (including but not limited to housing... transit, childcare, food and clothing etc.)

Risks

- Inability to access funding/financing to understand potentially higher cost projects
- Training and education organizations do not have the resources to engage in future-oriented initiatives and may not have the capability to provide necessary training services

Desired Outcomes

- Demonstrated evidence that Eastern Ontario has become a truly welcoming jurisdiction able to support current --- or future --- employers, entrepreneurs and workers in work/career success
- Third party data demonstrating that Eastern Ontario’s workforce is on track to meet current demand as well as that projected by 2030
- Demonstrated evidence that Eastern Ontario has the research, data and analytics capabilities to keep public and private stakeholders “ahead of the resilience curve”

7.5 Priority and Mandate: Transportation Networks and Services

Aspirational Goal: A multi-modal transportation system capable of moving people and goods safely and efficiently across the region and beyond. This explicitly includes use of new technologies and processes in logistics and transportation-related asset construction, maintenance and traffic flows.

Strategies and Responsibilities

- Support pan-regional mapping of transportation assets, with specific focus on those that provide access to markets (roads, bridges, airports, ports and marine services, rail and intermodal connection)
- Re-engage with the Ministry of Transportation to revisit incomplete tasks from the provincial transportation master plan for Eastern Ontario
- Develop the capacity within Eastern Ontario to track *and forecast* highway/road capacity for passenger and freight movement including but not limited to AADT and freight volumes off 400 series highways, and interpret implications for existing infrastructure
- Explore ways to address urban-rural transit for commuting as well as personal purposes (non-traditional approaches: car-sharing, shuttles, “on-demand” services)
- Build the region’s capacity to introduce innovative construction and maintenance methods and processes (e.g. joint procurement, engineering studies and inspections, specialized equipment sharing, different types of asphalt, embedded sensors, climate resilience measures)
- Develop the analytical capability to understand the financial implications of fuel and other shifts for municipalities’ ability to maintain transportation infrastructure (e.g. long-term implications of shift to EVs) and propose mechanisms to enhance provincial and/or federal funding

Risks

- Inability to access funding/financing from beyond municipal the tax base
- Staff responsible for transportation infrastructure do not have the resources to engage in future-oriented initiatives and may not have the technical expertise to lead innovation projects

Desired Outcome

- Demonstrated evidence of implementation of new/innovative policies, processes, practices, financing/business models that help to make transportation infrastructure more affordable
- Eastern Ontario is a leader in introducing cost-saving, efficient, safe ways to move people and goods
- Public and private sector organizations are capitalizing on improved transportation systems in order to pursue economic opportunity at home and abroad

7.6 Priority: Infrastructure for Business and Economic Development

Aspirational Goal: Eastern Ontario is known as a region that has integrated infrastructure in place to support above-average economic growth and community vitality.

Strategies and Responsibilities

- Ensure that Eastern Ontario has the digital, broadband, cellular, information technology, cybersecurity and AI foundations for business and economic success
- Serve as the internal (to EOLC) experts on IT implications of trends such as remote work, harmonization and technology inter-operability
- Lead a regional effort to:
 - Deploy technologies embedded in/used to maintain infrastructure
 - Increase environmental services infrastructure, especially communal services (business models and structures, financing)
 - Develop/deploy new business processes to support infrastructure construction and management (e.g. planning, permitting)
- Undertake demand-supply analysis and provide policy guidance on all forms of infrastructure including addressing “shovel worthy vs. shovel ready” considerations
- Lead “blank slate” thinking for infrastructure planning (ex. use of GIS to “see” distribution of infrastructure)

Risks

- Confusion/lack of coordination between working groups means “highest and best use” of scarce resources is unfulfilled
- Inability to access funding/financing for potentially higher cost projects
- Public and private sector organizations with construction and maintenance responsibilities are reluctant to support/implement better ways to provide infrastructure and may not have the capability to engage in long-term projects

Desired Outcome

- Published analyses that set out better ways to build and maintain infrastructure, especially those that reduce municipal costs or increase financial sustainability
- Demonstrated evidence of success in introducing lower per-household/per-capita costs for infrastructure construction and maintenance

7.7 Priority: Innovation Ecosystem and Support

Aspirational Goal: An innovation culture that is well-instilled across the region and supported by a tightly-coupled innovation ecosystem.

Strategies and Responsibilities

- In concert with other Working Group leadership, conduct an environmental scan to identify where innovation is most likely to be required/desired as part of the EOLC mandate, and the processes by which Innovation Committee will support action on the identified areas
- Design ways to build/strengthen innovation capacity into the EOLC (Board and Working Groups)
- Elaborate on/confirm the process by which the EOLC will assess and make decisions about any project to be recommended to the Board for action (e.g. the TRL approach)
- Design processes through which innovation-related risk for any/all EOLC priority themes can be shared (since not all innovations will succeed)
- Map and build a strong ecosystem of the region's innovation assets, including proactive ways to encourage collaborations that address identified challenges and opportunities
- Identify regional innovation asset and capability gaps and develop strategies, projects or processes to fill them
- Develop and implement outreach/communications processes to instill an innovation culture across the region including identifying barriers to innovation and how to break them down
- Convene regular (quarterly) regional innovation summits to share information, build partnerships and empower others to go to work on forward-looking initiatives
- Design and share (on a public platform) the measures that the EOLC will use to assess its success in achieving its aspirational goal for Innovation.

Risks

- Partners' inability to manage both the crises/opportunities of the moment and forward-looking planning
- Inability to find financing/funding through which to initiate projects with limited *short-term* ROI
- EOLC's inability to move swiftly enough on "shareable" innovation opportunities and any regional advantage is foregone
- Reputational risk associated with "failed" projects
- Use of procurement and/or evaluation processes that are ill-suited to innovation projects

Desired Outcome

- Demonstrated evidence of EOLC's success in building an innovation ecosystem (examples: growing number of "members", number of projects launched/partnerships stimulated for specific innovation initiatives)

Note: Both Board discussions and external stakeholder interviews encouraged the EOLC to undertake innovation projects that focus on:

- **Innovative governance** (ex. new ways to utilize Public-Private Partnerships/new governance models)
- **Policy** (ex. procurement, eligibility criteria)
- **New business models** (ex. use of Municipal Service Corporations) for environmental infrastructure (ex. water, wastewater, sewer)
- Tools for **administrative/regulatory processes** (ex. digital permitting; other digital platforms)
- Innovative **program designs** (ex. talent attraction and retention).

7.8 Board-Level/Corporate Initiatives

International and Interprovincial trade

- Provide support to EOWC and EOMC in their liaison with provincial and federal governments on international trade (CUSMA, CETA) and related issues (e.g. tariffs or other import/export considerations, diversification of markets)
- Provide data and/or economic policy support to provincial ministries and/or the Premier's Office to ensure that regional considerations are taken into account in discussions related to reducing interprovincial trade barriers.
- Secure funding for and serve as Steering Committee for projects related to regional competitiveness issues (ex. productivity; assessment of adequacy of energy supply and related infrastructure)

Advocacy Support

- Commission and fund region-level data analytics and/or economic policy support to Board member organizations undertaking advocacy programs related to region-wide economic development [where region-wide refers to urban (10 member municipalities of EOMC) or rural areas (13 member counties of EOWC), or both]. *[See above examples of issues for which this support would be provided, upon request]*

In-Region Communications

- Commission and fund the redevelopment and maintenance of a website that shares what the EOLC does, its priorities and projects, and how to get involved.
- Fund the development and distribution of newsletters, video messages and other basic communications tools to share the EOLC's work with internal (to municipal government) and external (other public and private sector) stakeholders who sign up to receive these materials.
- When designated to do so, support and participate directly in making (invited) presentations on the EOLC's work at partner meetings, conferences or trade shows.

8. Implementing the Regional Economic Development Strategy

The 2020-2025 period has been characterized by frequent and dramatic change --- the COVID-19 pandemic, healthcare system and housing challenges, inflation, dramatic changes to international trade, supply chains and regulatory environments, and ongoing military conflicts. Ontario residents also faced both provincial and federal elections in the first quarter of 2025. The depth and breadth of solutions to regional challenges and opportunities are also fast-paced and often disruptive --- new discoveries and research results, new technologies, new business models, and new economic alliances.

As economic strategies change, so do the organizations working in the same or similar market space as the EOLC. Although many of these organizations have a slightly different mandate or focus, the EOLC will be looking to a wide range of partners for development and implementation of projects to advance the regional cause.

Six Principles of Implementation

- Work is regional in scope and related to economic development
- Relies on evidence-based decision-making
- Shares risk and financial responsibility
- Limited/No post-project responsibilities
- Two-layer governance structure (Board and Working Groups)
- Based on collaborations/partnerships

Both in EOLC Board discussions and in interviews with external stakeholders, the EOLC was encouraged to focus on three main roles, with a relatively small number of projects at any point in time. The three main roles are:

- **Mapping regional assets and gaps** (to direct attention to opportunities and critical issues)
- **Undertaking pilot and/or demonstration projects** (to manage risks associated with innovative projects and share learnings/solutions across the region's stakeholders)
- **Playing a convening role** (bringing stakeholders together to address issues and supporting the most effective project development and implementation plans).

One way to stay organized in the implementation of regional economic development projects is to adopt a project development methodology that is: a) **innovation**-focused; b) **nimble** and/or has **in-project adaptation** "built in", and c) contemplates **multiple "hand-off" possibilities** (meaning that the EOLC need not bear full end-to-end responsibility for every project it supports).

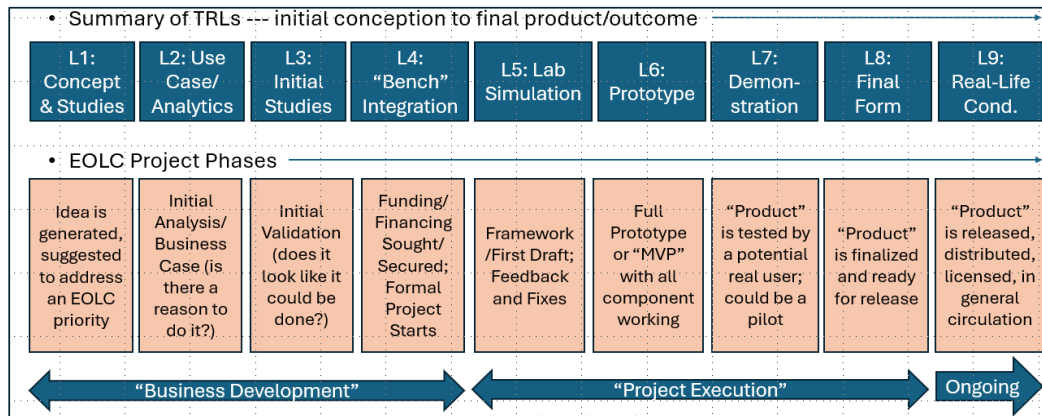
In light of the key characteristics required for the EOLC's project development methodology, the EOLC has adopted a modified version of the Government of Canada **Technology Readiness Level (TRL)** assessment tool, used by [Innovation, Science and Economic Development Canada](#).

The following diagram lays out the nine (9) TRL Levels (top row) that are then translated into EOLC Project phases (in the second row). Whether at the Board or Working Group level, the EOLC will begin with the first step and move left to right.

Business Development (L1-L4): As an idea is generated, it will be evaluated and, if there is good reason for the EOLC to proceed, the idea will be translated into a project description for which funding would be sought. Only when funding has been secured will the project begin.

Project Execution Phase (L5-L8): Most if not all projects would be expected to take an agile approach in which a “first draft” or prototype is developed *and tested* --- especially with the intended users --- with the expectation that further improvements would be made based on user feedback. There may be multiple cycles of testing and improvement in this Phase.

Ongoing Action (L9): Only after the prototype or product is deemed ready for deployment will it be published, released, distributed, licensed or otherwise put into general circulation. In the final stages of a project, the EOLC can choose to retain and release the project deliverable(s) in its own right or hand it off to an organization better suited to handle rollout, scale-up or long-term management. It is advisable if these considerations are included in the original project description (L1-4).



9. Ensuring Attention to Factors Leading to Economic Resilience

Influential Factor	The EOLC Approach	Assigned to
Governance & Leadership		
Anticipation Capacity	<ul style="list-style-type: none"> Predictive analytics Regional economic dashboard Leading indicators 	Innovation Committee (including Working Groups)
Digital Connectivity	<ul style="list-style-type: none"> Mobile internet Digital platforms for regulatory processes 	EORN and Infrastructure Committee
Governance Processes	<ul style="list-style-type: none"> Evidence-based decisions Collaborative advocacy Proactive processes Convening meetings/summits 	EOLC Board Working Groups (via member affiliations)
Financial Capacity	<ul style="list-style-type: none"> Ability to access funding Business development processes 	EOLC Board and/or partners (may vary by project)
Economic & Social Vulnerability		
Demographics – Aging	<ul style="list-style-type: none"> Focus on rebalancing demographics – increase 15-64 core percentage 	Workforce Development & Housing
Demographics - Affordability	<ul style="list-style-type: none"> Focus on cost of living, esp. incomes/affordability, availability of vital services 	Workforce Development & Housing; Transportation
Community Well-being	<ul style="list-style-type: none"> Focus on cost of living, esp. housing, availability of vital services; related infrastructure 	Workforce Development & Housing; Transportation; Infrastructure
Labour Market		
Labour Force Engagement	<ul style="list-style-type: none"> Focus on participation rate 	Workforce Development & Housing
Labour Force Mobility	<ul style="list-style-type: none"> Focus on increasing numbers of in-bound workers; transport. 	Workforce Development & Housing; Transportation
Workforce Near Retirement	<ul style="list-style-type: none"> Focus on increasing numbers of 15-55 age group/workers 	Workforce Development & Housing
Education & Skills Attainment	<ul style="list-style-type: none"> Focus on increasing numbers of workers with post-high school education & reskilling to fill gaps 	Workforce Development & Housing
Innovation Capacity		
Innovation capabilities – in-region or nearby	<ul style="list-style-type: none"> Map innovation assets (public and private sector); design programs or agreements to fill gaps; identify/build financial supports for innovative businesses/projects 	Innovation Committee

Note: shortened version of Working Group/Committee names are used for convenience only.



9.1 Mandate and Direction Assigned to Workforce Development, Deployment and Housing Working Group

EOLC Priority Projects: What to Do When?

Workforce Development, Deployment and Housing

Aspirational Goal: A regional workforce that is of sufficient size, literacy and skills level, technology-enabled, well-housed and/or mobile/able to work remotely if required, to address foreseeable in-region needs (e.g. five years out).

Priority/Working Group Mandate	Long-Term (5+ Years)	Medium-Term (3-4 Years)	Short-Term (1-2 Years)
Workforce Development & Deployment	<ul style="list-style-type: none"> Develop and refine long-term strategies to ensure an adaptable workforce to regional needs, taking the impacts of AI and other augmentative technologies into account Review the key factors determining labour market resilience and, using a data-informed approach, assess those on which Eastern Ontario should focus to create a truly resilient workforce and labour market. Encourage introduction of workplace technology (esp. automation and AI-job augmentation) 	<ul style="list-style-type: none"> Design and implement Phase 2 of the Labour Market Intelligence Platform (LMINT) to make accurate, granular, timely regional labour market data available to a broad base of users Convene stakeholder gatherings to support stakeholders in developing/ launching talent attraction and retention strategies Develop robust model to simulate future impacts on population and labour markets due to demographic change including migration and immigration (use 10-year horizon) 	<ul style="list-style-type: none"> Conduct research on regional labour market (demand, supply, over/under supply, gaps; emerging training requirements); focus first on priority sectors (ex. manufacturing, agriculture, forestry, construction, healthcare, tourism) Provide leadership to regional educators, training organizations and PSE institutions to help them understand current and emerging trends, opportunities and challenges associated with a resilient labour market (e.g. sectoral/occupational gaps; reskilling and upskilling needs and opportunities, new forms of education and training, including microcredentials) Convene stakeholder gatherings to develop strategies to address critical labour market issues, esp. reskilling, and to engage partners in implementation



Mandate and Direction Assigned to Workforce Development, Deployment and Housing Working Group

Priority/Working Group Mandate	Long-Term (5+Years)	Medium-Term (3-4 Years)	Short-Term (1-2 Years)
Housing	<ul style="list-style-type: none"> • Revisit/refresh the 10-year workforce housing projection in light of economic and social change • Support or lead at least one EOLC-generated project related to workforce housing 	<ul style="list-style-type: none"> • Identify and recommend indicators for “workforce housing” portion of regional dashboard to support workforce attraction and retention, and overall economic resilience • Begin tracking regional performance on recommended indicators • Support or lead at least one EOLC-generated project related to workforce housing 	<ul style="list-style-type: none"> • Produce a 10-year projection for workforce housing needs and work with the Infrastructure Working Group to provide the IWG with research about housing demand to support bringing innovation to regional housing construction and markets • Develop at least three (3) scenarios for EOLC consideration on ways to address workforce housing including the role(s) that the EOLC might play (if any)
Contribution to Board-level Initiatives	<ul style="list-style-type: none"> • Revisit/refresh the “cost of living” dashboard in light of economic and social change • Support or lead at least one EOLC-generated project related to cost of living 	<ul style="list-style-type: none"> • Identify and recommend “cost of living” indicators for inclusion in the regional dashboard to support workforce attraction and retention • Begin tracking regional performance on recommended indicators • Support or lead at least one EOLC-generated project related to cost of living 	<ul style="list-style-type: none"> • Provide the EOLC, its Working Groups/ Committees and other partners with “best available information” about the profile and expectations of current and potential residents and workers regarding living and working in the region. This information will include but not be limited to workforce housing considerations. • Develop at least three (3) scenarios for EOLC Board consideration on ways to address cost of living issues, including the role(s) that the EOLC might play (if any)



9.2 Mandate and Direction Assigned to **Transportation Networks and Services Working Group**

EOLC Priority Projects: What to Do When?

Transportation

Aspirational Goal: A multi-modal transportation system capable of moving people and goods safely and efficiently across the region and beyond. This explicitly includes use of new technologies and processes in logistics and transportation-related asset construction, maintenance and traffic flows.

Priority/Working Group Mandate	Long-Term (5+ Years)	Medium-Term (3-4 Years)	Short-Term (1-2 Years)
Both passenger and freight	<ul style="list-style-type: none"> Work with regional public works departments and the Innovation Committee and Infrastructure Working Group to update/improve roadway construction and maintenance methods Work with Infrastructure Working Group to integrate climate resilience considerations into Asset Management and roadway construction and maintenance methods and processes 	<ul style="list-style-type: none"> Support municipalities and other organizations with transportation infrastructure responsibilities to build understanding of utilization/flows (ex. volumes and associated standards, gaps, bottlenecks) Work with Innovation Committee to explore opportunities to deploy innovative technologies in road transportation (ex. remote capability to execute AADT counts, assess road conditions, targeted applications of CAV technology and/or use of AI in road safety) 	<ul style="list-style-type: none"> Map existing and planned transportation infrastructure across the region, including inter-provincial and international connections and modes (road, rail, marine/ports, air, active transportation) Ensure widespread knowledge of Autonomous Vehicle and EV-related infrastructure within the region Assess the roles of/opportunities related to air transportation services at regional airports Assess the roles of/opportunities related to cargo-focused ports especially as they could support east-west movement of goods Provide regional stakeholders with updated labourshed-based maps of commuter travel patterns



Mandate and Direction Assigned to **Transportation Networks and Services Working Group continued...**

Priority/Working Group Mandate	Long-Term (5+ Years)	Medium-Term (3-4 Years)	Short-Term (1-2 Years)
Passenger/Commuting	<ul style="list-style-type: none"> Develop strategies to build, fund and promote sustainable business models for serving passengers/commuters 	<ul style="list-style-type: none"> Track and forecast highway/ road capacity for passenger/ traveler movement Develop indicators to track progress on availability of commuter transportation options 	<ul style="list-style-type: none"> Research and share information on new business models and financing tools for commuter transportation (ex. on-demand, third party); work in conjunction with Infrastructure Working Group (IWG)
Freight/Moving Goods	<ul style="list-style-type: none"> Develop strategies to use autonomous vehicles to address first/last mile issues across the region 	<ul style="list-style-type: none"> Track and forecast highway/ road capacity for freight/ moving goods Gather and deploy collision data as a test case for AI to improve road safety 	<ul style="list-style-type: none"> Convene stakeholder meetings to develop a strategy for a regional freight transportation network, with a specific focus on linkages to export/import capacity and first/last mile capabilities to support market diversification
Contribution to Board-level Initiatives	<ul style="list-style-type: none"> Recommend and provide current data on the degree to which the region is moving toward its aspirational goal. 	<ul style="list-style-type: none"> In concert with the Workforce and Housing Working Group (WHWG), prepare an assessment of the workforce required to build, manage and maintain the region's transportation infrastructure in support of the region's economic aspirations (linked to priority sectors) 	<ul style="list-style-type: none"> Provide the Board with an assessment of the region's transportation infrastructure in relation to regional economic development aspirations and recommendations for action Maintain a standing watch on VIA's High Frequency Rail project and make recommendations to the Board for action, as required Continue to monitor the capital investment plans of the Ontario Ministry of Transportation for 400 series highways within the region and recommend any actions/ communications required



9.3 Mandate and Direction Assigned to Infrastructure for Business and Economic Development Working Group

EOLC Priority Projects: What to Do When?			
Infrastructure			
Aspirational Goal: Eastern Ontario is known as a region that has integrated, financially-sustainable infrastructure in place to support above-average economic growth and community vitality.			
Priority/Working Group Mandate	Long-Term (5+ Years)	Medium-Term (3-4 Years)	Short-Term (1-2 Years)
Digital (internet, cellular and related components such as cybersecurity and processing capabilities)	<ul style="list-style-type: none"> Assess and recommend actions on 'domestic' data centre(s) in the region, esp. ability to support AI 	<ul style="list-style-type: none"> Provide in-region expertise on defensive and national security technologies (ex. cybersecurity) for municipal governments and related organizations 	<ul style="list-style-type: none"> Completion/ongoing upgrading of high-speed internet and cellular services Provide internal (to EOLC) insight on inter-operability, remote work implications of technologies and applications
Environmental Services	<ul style="list-style-type: none"> Lead the development of use cases for the application of AI to operations and management of environmental services infrastructure or potentially other types of infrastructure 	<ul style="list-style-type: none"> Conduct analysis of better business models for servicing infrastructure for residential housing (MSCs may be only one option) 	<ul style="list-style-type: none"> Continue to advance communal services opportunities across the region Provide in-region expertise on the creation of Municipal Service Corporations (MSCs) for Environmental Services or potentially other types of infrastructure



Mandate and Direction Assigned to Infrastructure for Business and Economic Development Working Group continued...

Priority/Working Group Mandate	Long-Term (5+ Years)	Medium Term (3-4 Years)	Short-Term (1-2 Years)
Housing Infrastructure	<ul style="list-style-type: none"> Work with partners to create the in-region, in-province and interprovincial supply chain relationships to accelerate the construction of workforce housing across Eastern Ontario 	<ul style="list-style-type: none"> In conjunction with the Workforce and Housing Working Group, develop a 10-year projection for workforce housing & related infrastructure needs across multiple employer categories Undertake supply chain analysis to build housing & infrastructure to meet projected demand 	<ul style="list-style-type: none"> Examine and recommend innovative business models and methods for construction sector, especially residential; monitor and report on new building methods and technologies
Energy & Utility Infrastructure	<ul style="list-style-type: none"> Monitor energy demand vs. supply to ensure that workplaces and homes have access to sufficient reliable energy Recommend any actions/measures required to close any gap between demand and supply 	<ul style="list-style-type: none"> Undertake supply chain analysis for opportunities for all major forms of energy (oil & gas/LNG, electricity) in Eastern Ontario Maintain a standing watch on technologies or processes that reduce the environmental impact of energy use, including but not limited to mining, manufacturing, production/generation, transport and residual wastes or recycling 	<ul style="list-style-type: none"> Develop regional land/site map for any/all types of energy (sources/generation, transmission/transport, corridors/right-of-ways, load/demand estimates, materials recycling)
Contribution to Board-level Initiatives	<ul style="list-style-type: none"> Review and refresh case studies as well as regulations and legislation that affect infrastructure-related business models and the financial sustainability of these models 	<ul style="list-style-type: none"> Undertake financial analyses to help the EOLC Board, the EOWC and the EOMC, determine the best way to finance infrastructure over the next decade 	<ul style="list-style-type: none"> Develop policy recommendations for consideration by the EOLC Board, regulators, agencies and governments to expand in-region energy & utility opportunities



9.4 Mandate and Direction Assigned to Innovation Ecosystem and Support Committee

EOLC Priority Projects: What to Do When?			
Innovation			
Aspirational Goal: An innovation culture that is well-instilled across the region and supported by a tightly-coupled innovation ecosystem.			
Priority/Working Group Mandate	Long-Term (5+ Years)	Medium-Term (3-4 Years)	Short-Term (1-2 Years)
Innovation Ecosystem	<ul style="list-style-type: none"> In conjunction with Working Groups, recommend to the EOLC Board, at least one innovation-focused project that will enhance the region's contribution to provincial and/or national trade 	<ul style="list-style-type: none"> In conjunction with Working Groups, recommend to the EOLC Board, at least one innovation-focused project for each Working Group to fill an ecosystem gap 	<ul style="list-style-type: none"> Expand the scope and update the 2016 regional innovation ecosystem mapping report
Regional Productivity	<ul style="list-style-type: none"> Track and report to the EOLC Board on trends in regional productivity, along with any associated recommendations 	<ul style="list-style-type: none"> In conjunction with Working Groups, identify and recommend to the EOLC Board, at least one productivity improvement project/initiative for Eastern Ontario 	<ul style="list-style-type: none"> Undertake a research project to understand Eastern Ontario's productivity, by sector, and the factors that influence it
Regional Dashboard	<ul style="list-style-type: none"> Provide the EOLC Board with an annual progress report on implementation of the Strategy and progress on selected indicators 	<ul style="list-style-type: none"> Provide the EOLC Board with an annual progress report on implementation of the Strategy and progress on selected indicators 	<ul style="list-style-type: none"> Lead the EOLC effort to create an economically-focused regional dashboard, reporting on selected indicators that enable the EOLC to measure progress (from a 2025 baseline) on implementation of this Strategy



Mandate and Direction Assigned to Innovation Ecosystem and Support Committee continued...

Priority/Working Group Mandate	Long-Term (5+ Years)	Medium Term (3-4 Years)	Short-Term (1-2 Years)
Innovation in Priority Sectors	<ul style="list-style-type: none"> • Convene a regional “Innovation Summit” to measure progress from 2025, identify opportunities and recommend initiatives to increase productivity and innovation across all sectors of the Eastern Ontario economy. • Determine best ways to share risk (not all projects or innovations will succeed) 	<ul style="list-style-type: none"> • Undertake analysis to improve EOLC’s ability to select/support projects (ex: market failure and financing/funding; shovel-worthy vs. shovel ready) • Identify and recommend to the EOLC Board at least one technology or innovation-focused project that will improve business processes and/or operations conditions in a priority sector (ex. manufacturing, healthcare, construction, tourism, forestry) 	<ul style="list-style-type: none"> • Convene a regional “Innovation Summit” to identify opportunities and recommend initiatives to increase productivity and innovation in at least four sectors of the Eastern Ontario economy • Recommend to the EOLC Board a set of innovation priorities that can/should be implemented by organizations other than the EOLC • Identify opportunities and recommend initiatives for technology-based improvements to production and innovation within the agricultural and agribusiness sector
Support for Corporate Projects	<ul style="list-style-type: none"> • Review and report to the EOLC Board on progress in implementing its 2025 Strategy and offer recommendations for further improvement 	<ul style="list-style-type: none"> • In conjunction with the EOWC and EOMC, undertake a policy-focused analysis of the impact of changing energy utilization on business development and growth, profitability and the region’s contribution to provincial GDP 	<ul style="list-style-type: none"> • Develop recommendations for Board consideration regarding innovation strategies to support the region’s economic development aspirations in a new economic/trade era • Recommend indicators for tracking EOLC’s progress in implementing its 2025 Strategy



10. Appendices

Note to Board: are there any appendices you consider critical to ensuring reader understanding of/future reference to the Strategy?



Statement of Financial Position - Eastern Ontario Leadership Council

Account Name	Draft Budget 2024-2025	YTD 2025-03-31 <i>(not final)</i>
Revenue - Partner Contributions		
Previous Year Carry Forward - Unallocated and Plus Committed		
Cash on hand at bank	\$ 72,000	\$ 79,728
EOWC Contribution (\$25,000 included in cash on hand)	\$ 25,000	\$ 25,000
EOMC Contributions (\$25,000 to be transferred into EOLC account imminently)	\$ 25,000	\$ 50,000
EORN Contributions (in-kind contribution of admin/support time)	\$ -	
Ontario East EDC	\$ -	
Community Futures Eastern Ontario	\$ -	
Sub-Total - Cash on hand and anticipated revenues	\$ 122,000	\$ 154,728
Revenue - Other Revenues/Funds Recovered		
Labour Market AI Project (full project budget); Phase II application made Nov. 23	\$ 6,111	
HST rebates owing (Q1 2024)	\$ 6,111	
Sub-Total - Other Revenues/Funded Recovered	\$ 6,111	
Total REVENUE - ALL SOURCES	\$ 128,111	\$ 154,728
Operating Expenses		
Project Coordinator (usual budget allocation has been \$25,000 for last several years)	\$ 25,000	\$ 14,175
Website and Technology (includes domain hosting fees and EOLC Zoom license @ \$180.69)	\$ 2,381	\$ 1,938
Communications/Administration	\$ 7,500	\$ 19,550
Incorporation (including follow-on)		
Financial Management and Admin	\$ 5,000	\$ 10,672
Bank Charges	\$ 300	\$ 357
Insurance (paid for 2024-2025)	\$ 2,630	
Auditing Services (BakerTilly; HST included; paid)	\$ 5,000	
Conference/Events, Travel & Accommodation		\$ 1,622
Research (includes costs for data gathering, repository, analytics services)	\$ 30,000	\$ 15,391
EOLC Regional Economy Dashboard		
Project and Application Development	\$ 5,000	
Sub-Total - Operating Expenses (includes HST later rebated back to EOLC)	\$ 82,811	\$ 63,704
Working Group Expenses (Excluding Project Commitments)		
Workforce Development & Deployment - Workforce Housing and Labour Supply Projects	\$ 5,000	
Integrated, Intelligent Transportation Systems	\$ 5,000	
Innovation Sub-Committee	\$ 5,000	
Sub-Total - Working Group Expenses	\$ 15,000	
Project Funding Commitments		
Sub-Total - Project Funding Commitments		
TOTAL EXPENSES - ALL CATEGORIES	\$ 97,811	\$ 63,704
PROJECTED SURPLUS/DEFICIT FOR 2023-2024 and 2024-2025	\$ 30,301	\$ 91,024

(Note: EOMC paid 2023 & 2024 Contributions)

(Shared resource with EOWC)

(Bridge Technology \$4,031 + Suzanne Gibson \$11,360)

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EOLC INFRASTRUCTURE SUB-COMMITTEE MEETING MINUTES

Eastern Ontario Leadership Council (EOLC)

Meeting Minutes

Date: Thursday, March 20, 2025

Time: 1:00 PM – 3:00 PM

Attendance:

- Kathryn Wood (EOLC - Project Coordinator)
- Kristen Myers (EORN - PM)
- Kevin Farrell (Frontenac - CAO)
- Brenna Dallaway (EORN - Executive Assistant)
- Roger Fitch (EORN - Lead Analyst)
- Jim Miller (Infrastructure Specialist)
- Michel St-Onge (SD&G - Director of IT/EOIT Lead)
- Marcia Wallace (Prince Edward County CAO - EOWC Infrastructure Lead)
- Jason St. Pierre (CEO EORN and Chair of EOLC Infrastructure Committee)

Regrets

- Theresa Collins-Rubens (Prince Edward County Chief Administrative Officer)
- Cora Bevan (Northumberland County – GIS and Asset Manager)
- Jason Davis (Renfrew County - Director of Development and Property)

Guests:

- Matt Fairfield (EORN GIS - Specialist)

Delegation guests:

- Kris Philpott (Planview Utility Services Limited - Senior Vice President)
- Rob McKay (Planview Utility Services Limited - Vice-President, Infrastructure and Subsurface Utility Engineering)
- Mellissa Burke (Planview Utility Services Limited - Director of Infrastructure)
- Denise Squarzolo (Planview Utility Services - Director of SUE Infrastructure and Operations).

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EOLC INFRASTRUCTURE SUB-COMMITTEE MEETING MINUTES

1. Call to Order (1:01 PM)

Committee Chair Jason St. Pierre, called the meeting to order at 1:01p.m., welcomed the committee members, introduced the Planview delegation members and Brenna Dallaway EORN EA that will be supporting the committee.

2. Opening Remarks (1:05 PM)

Jason St. Pierre remarked that the February 2025 committee meeting was very productive, and it was decided by all that going forward the committee will meet on a monthly basis.

3. Review and Approval of Agenda (1:15 PM)

No additions or corrections were made.

4. Delegation from Planview to share the data collection on Millbrook (1:20 PM)

Rob McKay, Vice-President, Infrastructure and Subsurface from Planview utility services presented the Planview USL delegation power point presentation to the committee members.

The presentation highlighted an overview of Planview's history, the Mobile LiDAR process and development, the Digital twin visuals, and practical maps.

After the presentation, the committee questions enquired; if areas other than Millbrook have been developed and does Planview access subsurface infrastructure, and how is the data stored. The Planview delegation team responded by saying Millbrook was only

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EOLC INFRASTRUCTURE SUB-COMMITTEE MEETING MINUTES

used as a test site, collaborate very closely with the subsurface team, and all data is housed in a Canadian database centre.

All the reviewed data collected is also accessible through LiDAR. Note that the primary data collected by the LiDAR sensors is a point cloud, which is a collection of individual points in space, and each point represents a location where the LiDAR laser has interacted with a surface.

Jason St.Pierre noted we are presently optimistically cautious and are exploring options to review data with municipalities in order to develop a baseline.

5. Establishment of Governance Structure (1:40 PM)

Kathy Wood reviewed the governance structure of the Eastern Ontario Leadership Council (EOLC). The EOLC is comprised of five partners (EOWC, EOMC, EORN, Ontario East Economic Development Commission, and the CFDC) which are supported by the municipalities. The remaining EOLC structure includes several working groups (Transport, Innovation, Infrastructure, Workforce Development and Planning).

As Infrastructure is a broad scope, would it be possible for the infrastructure committee members discuss the possibility in creating a “Right Use Cases” subcommittee working group? The Right Use Cases subcommittee could be tasked with reviewing the circumstances surrounding MSCs.

ACTION ITEM: Explore leveraging existing external working groups on their structures.

6. Review of Current Projects ideas and Initiatives (2:00 PM)

Kristen Myers, EORN Project Manager gave an overview of the Renfrew County Housing and Land Development Corporation (RCHLDC) Preliminary Business Case presentation that was given on February 26, 2025. The overview of the business case and visual mapping process that noted; the majority of MSC’s have received funding,

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EOLC INFRASTRUCTURE SUB-COMMITTEE MEETING MINUTES

that may take up to seven years to complete, and that more information should be provided to the Townships on the process going forward.

ACTION ITEM: Marcia Wallace requested that MSC comparable be provided in at the next or following committee meeting.

7. Open Discussion / Q&A (2:40 PM)

Michael St. Onge provided an EOIC update noting that the first session with the Ben Perry group has not taken place regarding Bill 1.94 (MFIPPA, privacy, security, cybersecurity etc.). That the committee is in the early stages of taking a conservative approach regarding Bill 1.94 (cybersecurity and A.I. requirements) and developing common policies – but are looking forward to working together on the processes in the future.

Jason St.Pierre provided an update on the Cell Gap project and the addition of Redwood to the process. As well, Redwood is providing fibre builds on behalf of several municipalities.

8. Next Steps & Action Items (2:50 PM)

1. Committee members to further discuss the possibility of the creation of an “Right Use Cases” EOLC Infrastructure subcommittee working group.
2. Explore leveraging existing external working groups on their structures. Matt Fairfield to reach out to the Peterborough GIS committee to investigate further.
3. Marcia Wallace requested that MSC comparable be provided in at the next or following committee meeting.
4. Matt Fairfield to reach out to the Peterborough GIS committee to investigate their structure.

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EOLC INFRASTRUCTURE SUB-COMMITTEE MEETING MINUTES

5. Brenna Dallaway to circulate a Doodle poll to schedule next committee meeting for April - May 2025.

9. Adjournment (2:53 PM)

Meeting Materials:

- Digital Twin Planview USL – Presentation.
- Renfrew County Housing and Land Development Corporation (RCHLDC) Preliminary Business Case.

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INFRASTRUCTURE SUB-COMMITTEE Meeting Minutes 2025-02-04

EOLC Infrastructure Committee Meeting Minutes - February 4th, 2025

Attendance:

- Cora Bevan (Northumberland County – GIS and Asset Manager)
- Kathryn Wood (EOLC Project Coordinator)
- Kristen Myers (EORN PM)
- Kevin Farrell (Frontenac CAO)
- Jason Davis (Renfrew County Director of Development and Property)
- Jim Miller (Infrastructure Specialist)
- Michel St-Onge (SD&G Director of IT/EOIT Lead)
- Marcia Wallace (Prince Edward County CAO - EOWC Infrastructure Lead)
- Roger Fitch (EORN Lead Analyst)
- Jason St. Pierre (CEO EORN and Chair of EOLC Infrastructure Committee)

Regrets:

- Stephen Paul (Lennox and Addington Director of Community and Development Services)

Meeting Highlights

1. Introductions:

- A round-table introduction of new members joining the committee was conducted.

2. Overview of Infrastructure Challenge:

- The committee discussed the broad scope of the infrastructure challenges, which include:
 - **Physical Infrastructure:** Bridges, water systems, roads, etc.
 - **Digital Infrastructure:** AI applications, cybersecurity, data storage/access.
 - **Legislative Requirements:** Asset planning, regulatory compliance.
 - **Regional Focus:** Addressing challenges and opportunities across the region.
 - **Research & Tools:** Investigating models like MSCs and MSBs to support infrastructure investment.

3. Current Infrastructure Gap in EOWC Municipalities:

- EOWC municipalities face significant infrastructure challenges:
 - \$981M needed annually to close the capital gap.
 - \$403M annually spent on asset maintenance and deficit reduction.
 - Over \$12B in assets managed.

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INFRASTRUCTURE SUB-COMMITTEE

Meeting Minutes 2025-02-04

- \$536M spent on operational infrastructure and maintenance.
- The infrastructure deficit has grown to \$6B.

4. EOWC's Vision & Strategy:

- EOWC aims to become an early adopter of technologies and governance models to address infrastructure gaps, including private sector partnerships.
- **Key Strategies:**
 - Ensure Eastern Ontario has the foundations for digital and IT success.
 - Serve as internal experts on IT trends like remote work and tech interoperability.
 - Lead regional efforts to deploy technologies for infrastructure maintenance.
 - Focus on environmental services, communal infrastructure, and new business models.
 - Undertake demand-supply analysis and provide policy guidance.
 - Lead "blank slate" thinking for infrastructure planning, utilizing GIS technology.

5. Discussion Points:

- **Artificial Intelligence (AI):** Opportunities and potential impacts of Bill 194.
 - Proposal for creating an AI subcommittee to educate and develop adoption strategies for municipalities.
 - Data quality as a key issue for implementing AI applications.
- **Infrastructure Dashboards:** Discussion on creating open-access dashboards for regional use (e.g., Guelph or Mississauga portals).
- **LIDAR Data Campaign:** The Ministry of Natural Resources (MNR) plans a spring LIDAR campaign, with the potential to leverage this data alongside other sources like ESRI and AHSIP for improved mapping.
- **Eastern Ontario Data Strategy:** Including the collection and storage of regional data, open access data strategy and publication of data, addressing the quality of current data within municipalities.
- **AI adoption strategy:** Map out current AI adoption strategies and preparedness and establish an adoption strategy plan.
- **Creation of regional MSCs to deliver servicing:** Create and review a plan to implement regional MSC plan to support municipalities within specific services (i.e. Water/wastewater)

6. Action Items:

- A Doodle poll has been sent to the team to schedule the next meeting in March.

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INFRASTRUCTURE SUB-COMMITTEE

Meeting Minutes 2025-02-04

- **EORN Research Sharing:** EORN will share ongoing research into MSCs and other models for supporting infrastructure investment. This may include regional MSCs for specific infrastructure projects.
- **Leveraging Existing Committees:** Review of existing EOWC committees such as EOIT and CoST, and how they can support the Infrastructure Committee's goals, and we should be able to provide a list of committees and CAO leads for these committees in March.
- **Formation of Subcommittees:**
 - **Digital Infrastructure (EORN/EOIT lead?):** Focus on cell gaps, IoT, cybersecurity, AI, and data storage.
 - **GIS and Digital Permitting:** Investigate how GIS data can contribute to digital twin opportunities.
 - **Physical Infrastructure:** Explore decentralized water/wastewater systems, hydro upgrades, and asset inspections in municipal Right-of-Way.

7. Closing Remarks:

- Thanks to all members for their participation in our first EOLC Infrastructure Committee meeting.
- Next meeting is scheduled for March, with Brenna joining to assist with minute-taking and action item tracking.

For any questions or corrections, please feel free to reach out.



Eastern Ontario's Top Economic Sectors Are At Risk

Across Eastern Ontario, **annual sales from all sectors average \$124 billion a year**, roughly \$115 billion of which comes from private sector businesses (the remaining balance is public funding transfers).

Manufacturing is the largest sector in the regional economy with **\$43.9 billion** in annual sales. Two manufacturing subsectors along with agriculture, transportation and residential building construction have been prioritized for analysis due to their sheer size in the region's economy and the potential impact of trade disruptions. Taken together, **\$24 billion in economic activity with nearly 49,000 jobs may be at risk**. These five sectors alone account for 21% of the regional economy.

Sector	Annual Sales from Region's Producers	Jobs	Percentage of Total Private Sector Regional Economic Output
Resins & Rubber	\$6.88 Billion	3,324	6.8%
Electrical Equip.	\$4.83 Billion	6,648	4.6%
Agriculture	\$4.13 Billion	11,863	3.6%
Transportation	\$4.04 Billion	17,187	3.5%
Residential Building Construction	\$3.69 Billion	9,700	3.2%
Total	\$23.57 Billion	48,722	20.5%

ⁱ Beyond Manufacturing at \$43.9 billion, the next 10 largest sectors by sales are Public Administration (\$13 billion), Construction (all forms) (\$9.4 billion), Healthcare and Social Assistance (\$8.8 Billion), Retail Trade (\$5.3 Billion), Transportation and Warehousing (\$4.7 Billion), Professional, Scientific and Technical Services (\$4.7 Billion), Educational Services (\$4.6 Billion), Agriculture, Forestry, Fishing and Hunting (\$4.4 Billion), Wholesale Trade (\$3.6 Billion)

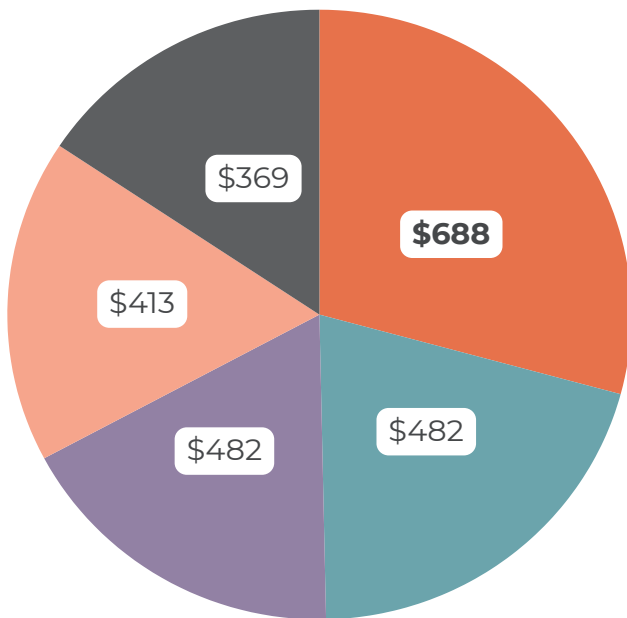


Top Sectors At Risk

If there was a 10% decline in sales of the prioritized sectors, the region's economic activity would be reduced by **\$2.4 billion a year**. This would lead to a **reduced payroll of \$592 million** and **11,500 fewer jobs**. It is unlikely that there will be a rebound on these measures before the end of the decade.

Sales, Jobs and Payroll Impact of 10 % Decline in Sales by Sector

Sector	Decline in Annual Sales	Change in Jobs	Change in Payroll
Resins & Rubber	-\$688 Million	-492	-\$29 Million
Agriculture	-\$482 Million	-1,203	-\$78 Million
Transportation	-\$413 Million	-1,493	-\$60 Million
Electrical Equipment	-\$404 Million	-6,700	-\$348 Million
Residential Building Construction	-\$369 Million	-1,614	-\$82 Million
Total	-\$2.356 Billion	-11,502	-\$592 Million



Value of 10% Decline in Sales for Five Priority Sectors in Eastern Ontario

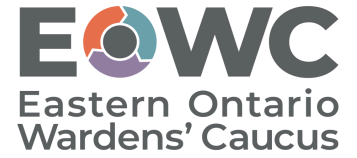
(in \$ millions / year)

Out of the \$2.35B decline in annual sales, the **Resins & Rubber** sector is expected to experience the largest drop.

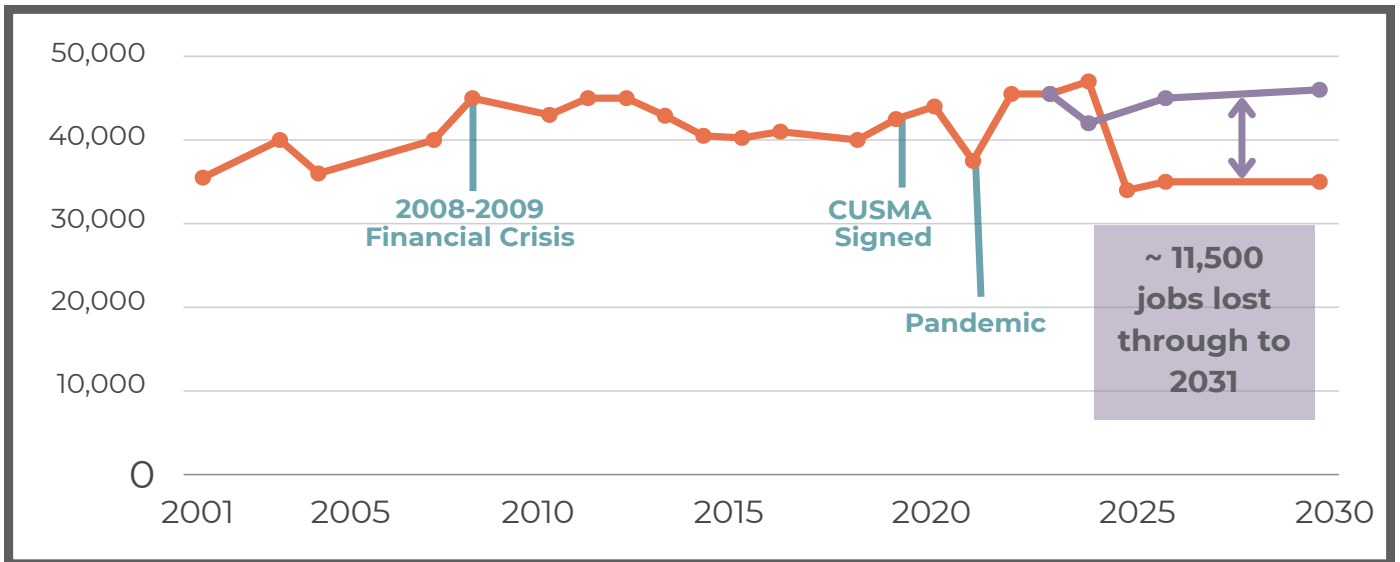
- Resins & Rubber
- Electrical Equipment
- Agriculture
- Transportation
- Residential Building Construction



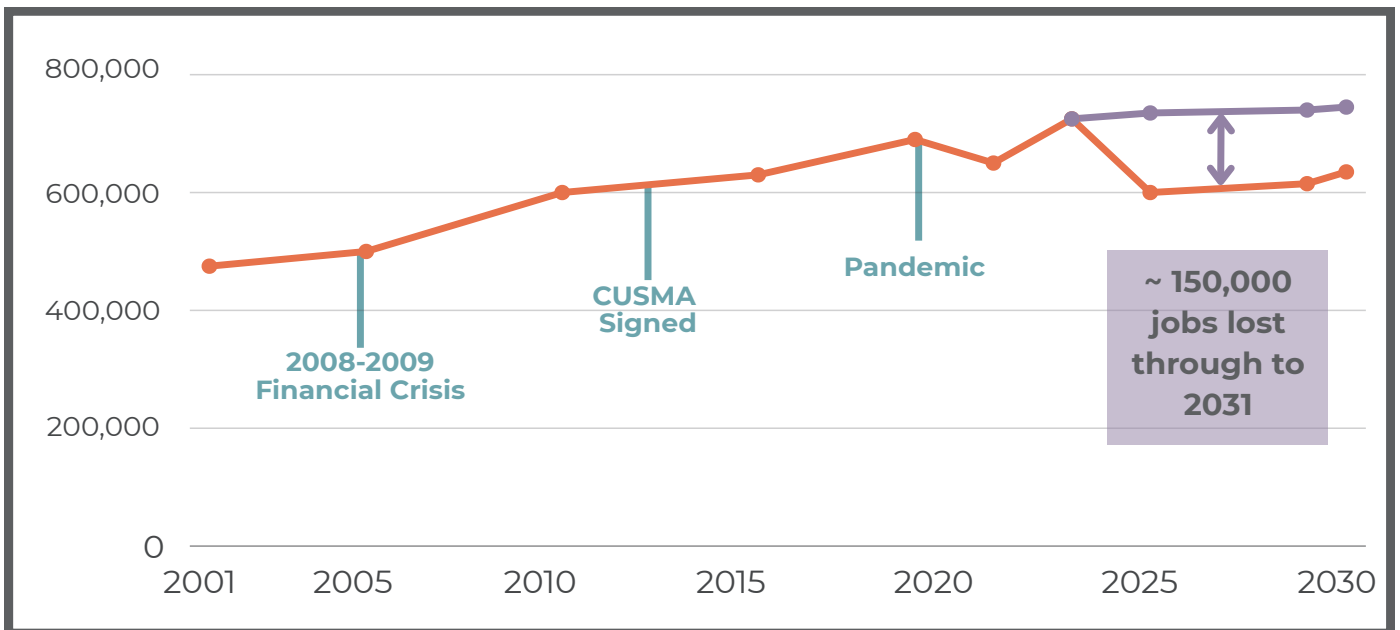
Top Sectors At Risk



Total Impact on **Eastern Ontario** Jobs of a 10% Decline in Sales in Five Sectors



Total Impact on **Ontario** Jobs of a 10% Decline in Sales in Five Sectors



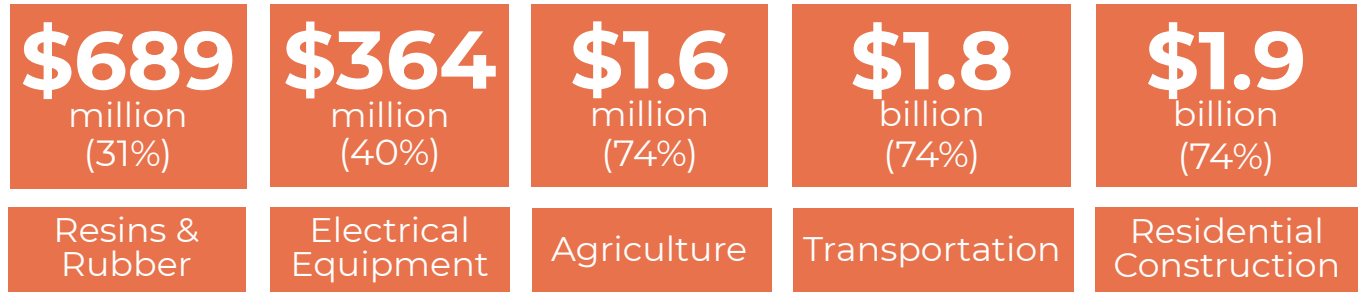
- Five Priority Sectors - 10% decline in sales
- Five Priority Sectors - No trade disruption



Build Resilience, Pursue Opportunity

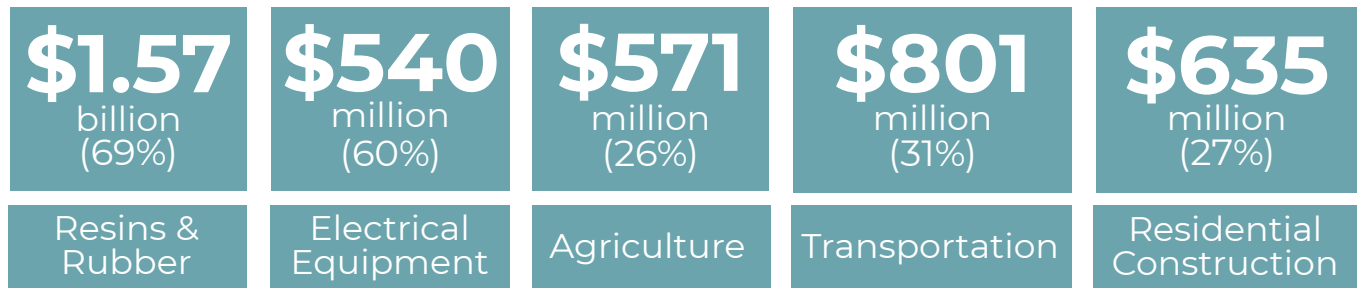
Eastern Ontario's Ability to Supply Its Own Inputs

How can we build on this strong foundation and grow our own supply chains?



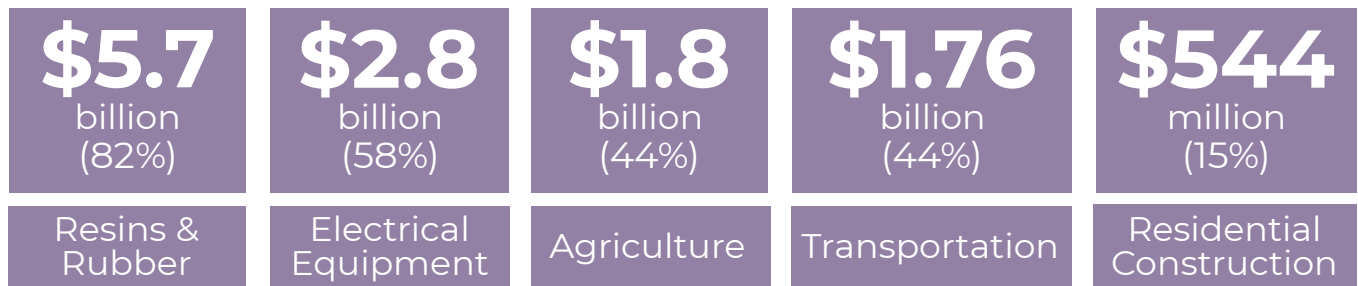
Eastern Ontario Imports

How can we diversify our supply chains and buy more from other regions or provinces?



Eastern Ontario Exports

How can we sell more to other regions or provinces?



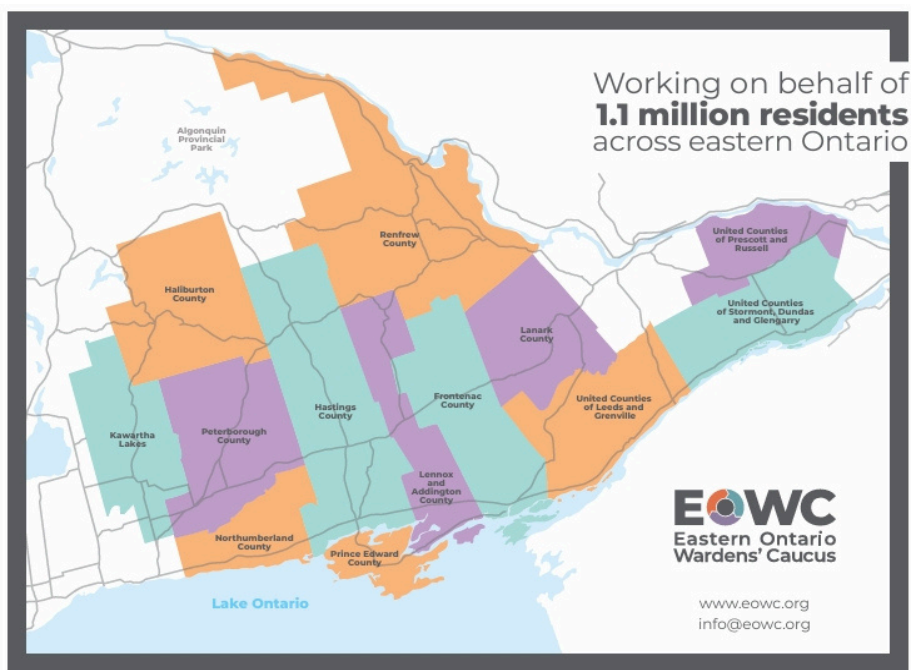
Imports for 12 Sectors Exceed \$1 Billion a Year

Sectors for Which Eastern Ontario is Importing At Least \$1 Billion A Year in Goods or Services (Private Industry Only)	Annual \$ Value Imports (from out of region)
Farms	\$2.4 Billion
Resin, synthetic rubber and artificial and synthetic fibres and filaments manufacturing	\$2.2 Billion
Petroleum and coal product manufacturing	\$2.1 Billion
Motor vehicle manufacturing	\$1.9 Billion
Oil and gas extraction	\$1.9 Billion
Depository credit intermediation	\$1.6 Billion
Basic chemical manufacturing	\$1.6 Billion
Lessors of real estate	\$1.3 Billion
Computer systems design and related services	\$1.2 Billion
Residential building construction	\$1.1 Billion
Insurance carriers	\$1.1 Billion
Wired and wireless telecommunications carriers (except satellite)	\$1.0 Billion

Eight Sectors Export At Least \$1 Billion a Year Out of Eastern Ontario

Eastern Ontario Sectors with At Least \$1 Billion A Year in Exports Out of the Region (Private Industry Only)	Annual \$ Value Exports (from out of region)
Resin, synthetic rubber, artificial and synthetic fibres and filaments manufacturing	\$4.9 Billion
Other electrical equipment and component manufacturing	\$1.9 Billion
Farms	\$1.8 Billion
Basic chemical manufacturing	\$1.6 Billion
Dairy product manufacturing	\$1.4 Billion
Grainseed and oilseed milling	\$1.3 Billion
Motor vehicle parts manufacturing	\$1.2 Billion
Alumina and aluminum production and processing	\$1.0 Million

The Eastern Ontario Wardens' Caucus (EOWC Inc.) is a non-profit organization representing 103 small urban and rural municipalities across Eastern Ontario. Spanning 50,000 square kilometres and serving over 1.1 million residents, the EOWC has been a united regional voice for more than 20 years. It advocates for municipal priorities and collaborates with all orders of government, businesses, non-profits, Indigenous leaders, the media, and the public to drive positive change for Eastern Ontario.



- County of Northumberland
- County of Peterborough
- United Counties of Prescott and Russell
- Prince Edward County
- County of Renfrew
- United Counties of Stormont, Dundas and Glengarry
- County of Frontenac
- County of Haliburton
- County of Hastings
- City of Kawartha Lakes
- County of Lanark
- United Counties of Leeds and Grenville
- County of Lennox and Addington

PRIORITIES



ECONOMIC RESILIENCE

The Bridge to Opportunity, Equity, and Growth



INFRASTRUCTURE

The Foundation for Local Prosperity



HOUSING

The Backbone of Thriving and Safe Communities



HEALTH CARE

The Engine for Healthy and Resilient Communities

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Eastern Ontario Wardens' Caucus



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Eastern Ontario Wardens' Caucus

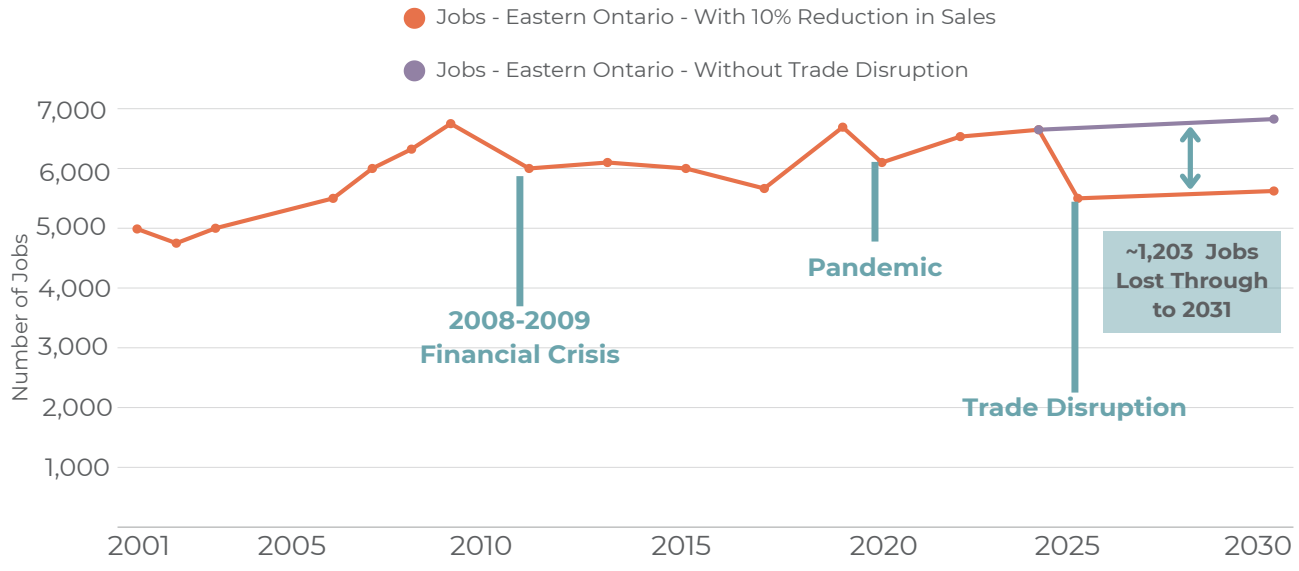
A Foundation of Our Economic Future: The Electrical Equipment Sector

Annual Sales from Region's Producers	Jobs (Direct and Spinoff) (Est. 2024)	Percentage of Total Private Sector Regional Economic Output	\$ Value of 10% Decline in Sales/Year
\$4.83 Billion	6,648	4.6%	\$483 Million

Producing and distributing electrical equipment for electricity generation and transmission, distribution along with component manufacturing, HVAC and wholesaling is a **\$4.83 billion industry** in Eastern Ontario. It represents nearly 5% of the region's private sector output, and roughly 6,500 jobs.

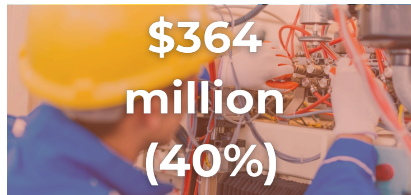
This sector has seen **modest but steady growth over the past several decades**. In the absence of trade disruptions, this sector is projected to continue this pattern through to the end of the decade. With disruption (example: a 10% decline in sales revenues), **employment could decline to levels last seen in 2006**. Direct and spinoff job loss: 1,203.

Job Impacts in Eastern Ontario of 10% Decline in Sales in Electrical Equipment Sector





Nearly Two-Thirds of Eastern Ontario Production is Exported



In-region Purchases



Imported Purchases (from outside the region)



Exports out of Region (% of total Sales)

More than half of total sales (58.2%) in the region’s electrical equipment sector are to customers outside Eastern Ontario. Depending on the share of these exports that are outside Canada, the sector may be vulnerable to trade disruption. In addition, this sector imports \$540 million in inputs and labour (60% of total requirements). If a large share of these inputs come from outside Canada, price increases or reciprocal tariffs could reduce sales. For instance, a 10% decline in sales in this sector (\$482 million/year) would **reduce the region’s payroll by \$78 million** with roughly **1,203 fewer jobs** in the sector.



Electrical Equipment Supply Chain Relies on Key Metals and Critical Minerals

The electrical equipment sector relies on many other goods-producing sectors as part of its supply chain. Five sub-sectors derive nearly \$200 million a year in revenues from the electrical equipment sector. Roughly half of that is non-ferrous metal production and processing (ex. critical minerals such as copper, nickel, cobalt, mercury). Aluminum and steel are also important supply chain partners.

Sector	Top 5 Subsectors Affected	\$ Value of Purchases from Subsectors
Electrical Equipment	Non-ferrous metal (except aluminum) production and processing	\$113 Million
	Alumina and aluminum production and processing	\$27 Million
	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	\$22 Million
	Semiconductor and other electronic component manufacturing	\$22 Million
	Iron and steel mills and ferro-alloy manufacturing	\$8 Million
	Total at risk:	\$193 million

Data source: Lightcast
 NAICS Code:
 2211 - Electric power generation, transmission and distribution
 3351 - Electric lighting equipment manufacturing

3353 - Electrical equipment manufacturing
 3359 - Other electrical equipment and component manufacturing
 4161 - Electrical, plumbing, heating and air-conditioning equipment and supplies merchant wholesalers

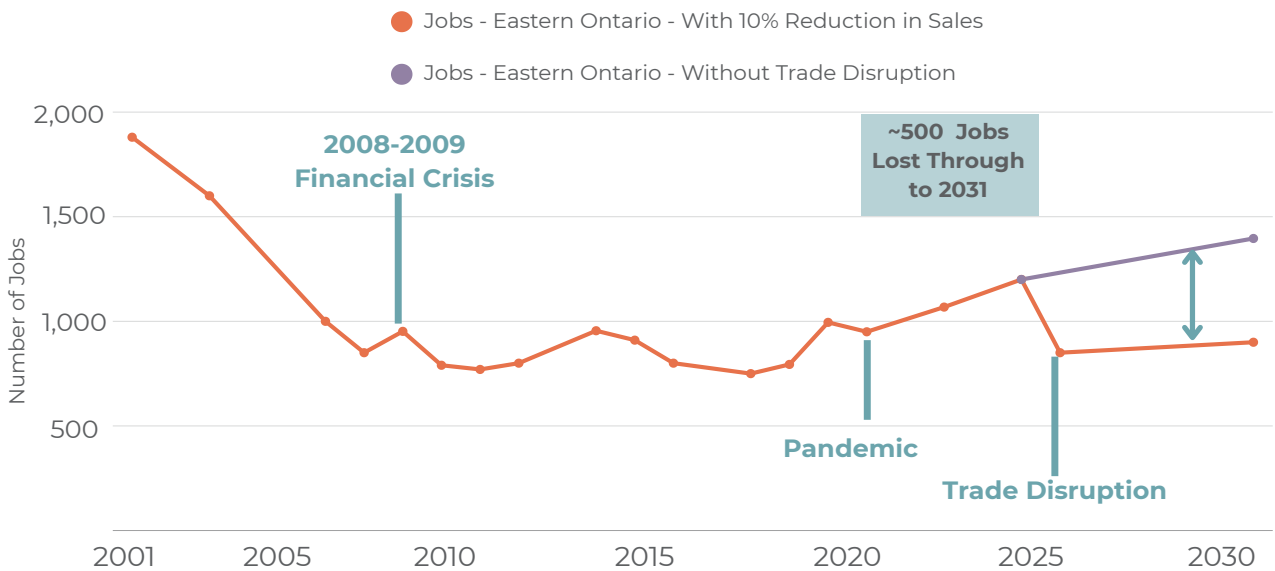


A Strategic Resource for the Entire Province: Resins & Rubber Sector

Annual Sales from Region's Producers	Jobs (Direct and Spinoff) (Est. 2024)	Percentage of Total Private Sector Regional Economic Output	\$ Value of 10% Decline in Sales/Year
\$6.88 Billion	3,324	6.8%	\$688 Million

The Resins & Rubber Sector is the **single largest manufacturing sector** in Eastern Ontario. Currently, Eastern Ontario accounts for roughly 20% of the province's capacity and **direct employment was projected to rise** to 1,396 by the end of the decade. With prospects of trade disruption (example: a 10% decline in sales revenues), employment could decline to levels last seen in 2017 throughout the region. Direct and spinoff job loss: 492.

Job Impacts in Eastern Ontario of 10% Decline in Sales in Resin and Rubber Sector





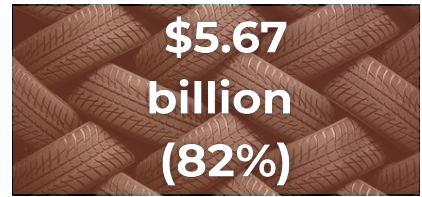
Nearly Two-Thirds of Eastern Ontario Production is Exported



In-region Purchases



Imported Purchases (from outside the region)



Exports out of Region (% of total Sales)

While production capacity remains strong in the region, this sector imports 2/3 of its inputs from outside the region. In-region demand for this sector is relatively small (\$1.21 billion). As a result, more than **80% of Eastern Ontario production is exported** to destinations outside the region. Therefore, **the sector is vulnerable to declining exports** for customers outside of Canada if significant trade disruption takes place (e.g., tariffs on exports, reciprocal tariffs on material inputs, or supply chain congestion).

If this sector sees a 10% decline in sales revenues, the economic hit to Eastern Ontario would be significant: \$688 million a year in lost revenue, a \$29 million decline in annual payroll, and roughly 500 fewer jobs.



Trade Disruptions Would Affect 249 Supply Chain Sub-Sectors

Any trade disruption to this sector will affect 294 supply chain sub-sectors across the region and beyond. Nearly \$1.45 billion in sales revenues of the top five sub-sectors are at risk, especially the chemical manufacturing sector.

Sector	Top 5 Subsectors Affected	\$ Value of Purchases from Subsectors
Resins and Rubbers	Basic chemical manufacturing	\$1.05 Billion
	Petroleum and coal product manufacturing	\$205 Million
	Pesticide, fertilizer and other agricultural chemical manufacturing	\$64 Million
	Electrical power generation, transmission and distribution	\$52 Million
	General freight trucking	\$45 Million
	Total at risk:	\$1.42 Billion

Data source: Lightcast
 NAICS Code:
 3252 – Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing
 3262 - Rubber product manufacturing

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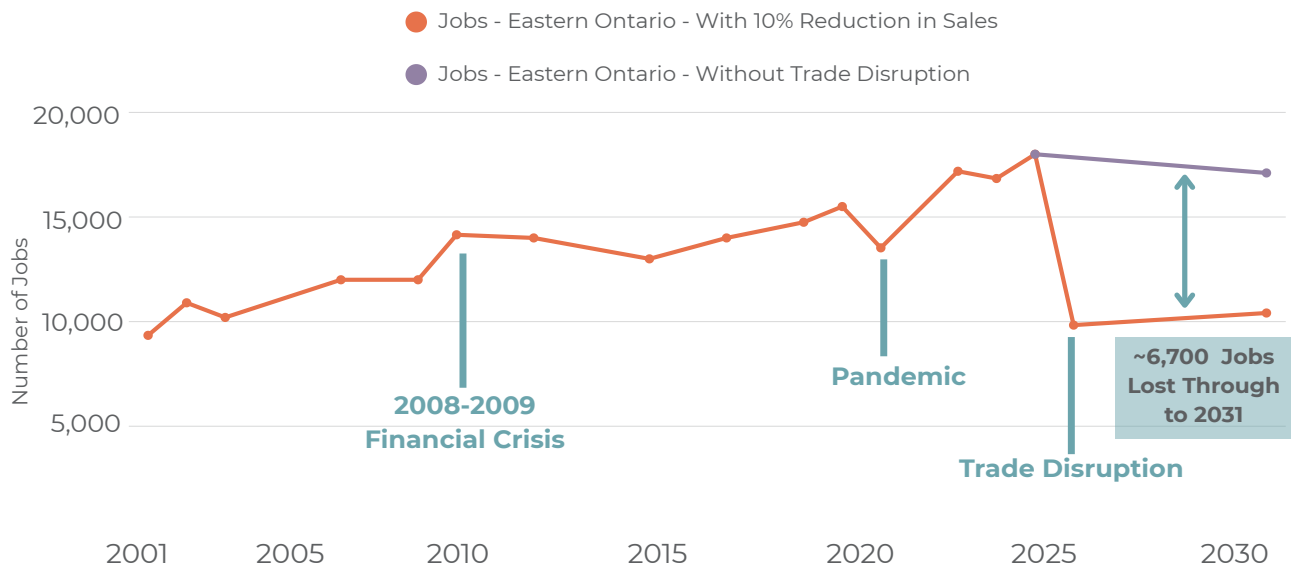
Moving Raw Materials, Finished Goods and People: Eastern Ontario's Transportation Sector

Annual Sales from Region's Producers	Jobs (Direct and Spinoff) (Est. 2024)	Percentage of Total Private Sector Regional Economic Output	\$ Value of 10% Decline in Sales/Year
\$4.04 Billion	17,187	3.5%	\$404 Million

Eastern Ontario's transportation sector is a \$4 billion a year business and one of the region's largest non-manufacturing sectors, with almost 17,200 jobs.

The sector has been growing steadily for the past 25 years and, without trade disruptions, **is expected to continue slow but steady growth**. However, because the **transportation sector serves all parts of the economy**, broad trade disruptions or countervailing tariffs that reduce shipping requirements or passenger travel could have a devastating impact. A 10% decline in sales revenue (\$404 million) will translate into significant job loss through to the end of the decade. Direct and spinoff job loss: 6,700 jobs.

Job Impacts in Eastern Ontario of 10% Decline in Sales in Transportation Sector





Nearly Two-Thirds of Eastern Ontario Production is Exported



In-region Purchases



Imported Purchases
(from outside the region)



Exports out of Region
(% of total Sales)



Take the Ripple Effects of Supply Chain Disruption into Account

Beyond the \$2.1 billion/year freight trucking sector, petroleum and coal product manufacturing, and motor vehicle parts headline the top five sectors affected by sector disruption. Together, the top five represent \$810 million of purchases that would be at risk.

Sector	Top 5 Subsectors Affected	\$ Value of Purchases from Subsectors
Transportation	Petroleum and coal product manufacturing	\$523 Million
	Motor vehicle parts manufacturing	\$94 Million
	Insurance carriers	\$75 Million
	Freight transportation arrangements	\$72 Million
	Employment services	\$46 Million
	Total at risk:	\$801 Million

Data source: Lightcast

Sector definitions by NAICS Code:

- 4811 - Scheduled air transportation
- 4812 - Non-scheduled air transportation
- 4821 - Rail transportation
- 4831 - Deep sea, coastal and Great Lakes water transportation
- 4832 - Inland water transportation
- 4841 - General freight trucking
- 4842 - Specialized freight trucking
- 4851 - Urban transit systems
- 4852 - Interurban and rural bus transportation
- 4853 - Taxi and limousine service
- 4854 - School and employee bus transportation
- 4855 - Charter bus industry
- 4859 - Other transit and ground passenger transportation

- 4881 - Support activities for air transportation
- 4882 - Support activities for rail transportation
- 4883 - Support activities for water transportation
- 4884 - Support activities for road transportation
- 4885 - Freight transportation arrangement
- 4889 - Other support activities for transportation

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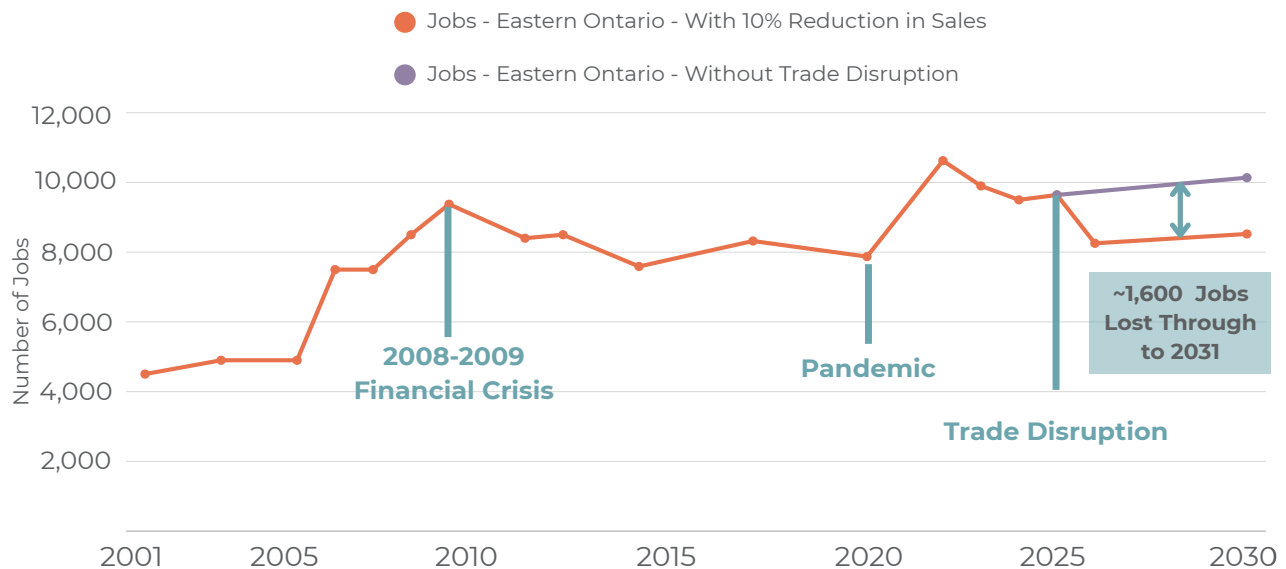
Eastern Ontario's Strength: Residential Building Construction

Annual Sales from Region's Producers	Jobs (Direct and Spinoff) (Est. 2024)	Percentage of Total Private Sector Regional Economic Output	\$ Value of 10% Decline in Sales/Year
\$3.69 Billion	9,700	3.7%	\$369 Million

Residential building construction is a regional strength, with a **strong concentration of skilled labour** (employment concentration of 1.09) and businesses now producing for this market in manufacturing settings. Total annual sales are \$3.7 billion a year with 4,850 direct jobs and just as many in the supply chains supporting this sector.

Eastern Ontario has a strong track record of building more homes per capita than most other regions in the province. However, ongoing setbacks in residential construction pose a serious strategic threat, especially given the critical shortage of affordable housing. Direct and indirect job loss from a 10% decline in sales revenues: 1,614.

Job Impacts in Eastern Ontario of 10% Decline in Sales in Residential Construction Building Sector





Eastern Ontario Supplies Most of Its Own Inputs and Labour



In-region Purchases



Imported Purchases (from outside the region)



Exports out of Region (% of total Sales)

This sector purchases 3/4 (73%) of its inputs and labour from within the region and imports a smaller share (27%). Little of the region's production (15%) is exported which may indicate a significant economic opportunity. The vulnerability of this sector may be related to specialized imports, inability to finance required infrastructure, or overall weakening in demand for housing as a result of an economic downturn.

A highly volatile sector in the past decade: if it sees a 10% decline in sales revenues, the economic hit to Eastern Ontario would be significant:

- \$369 million a year in lost revenue
- \$82 million decline in payroll
- 1,600 fewer jobs every year until at least the end of the decade.

In short, the sector might reset to the time just before the 2008-2009 financial crisis.



At Risk: Four Key Sub-Sectors Supporting Residential Construction

A trade disruption to this sector would affect 294 supply chain sub-sectors across the region and beyond. The top five supply chain partners for residential construction in Eastern Ontario are wood-related, metals and plastic product manufacturing along with the architectural and engineering services. The residential construction sector in Eastern Ontario purchases more than \$700 million a year from these five subsectors alone. A 10% decline in purchases from this supply chain means over \$70 million a year in lost business with associated job losses. Affordability of housing is likely to remain challenging.

Sector	Top 5 Subsectors Affected	\$ Value of Purchases from Subsectors
Residential Building Construction	Other wood product manufacturing	\$173 Million
	Architectural and structural metals manufacturing	\$164 Million
	Plastic product manufacturing	\$146 Million
	Architectural, engineering and related services	\$118 Million
	Veneer, plywood and engineered wood product manufacturing	\$114 Million
	Total at risk:	\$715 million

Data source: Lightcast
 NAICS Code:
 2361 – Residential building construction

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 eowc.org

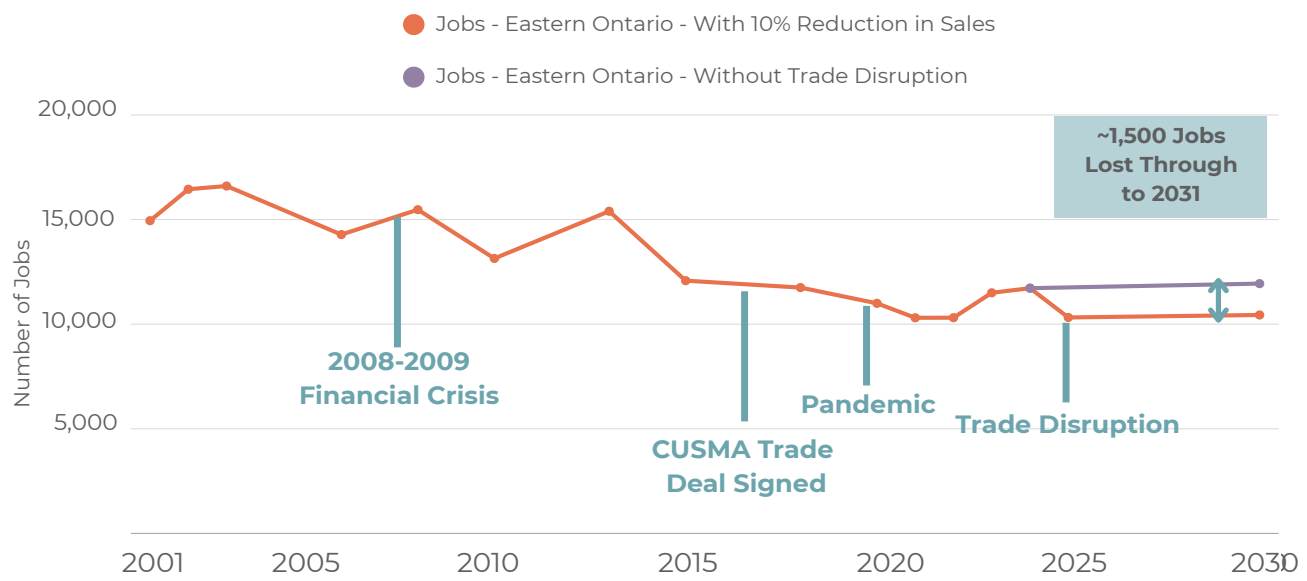
An Anchor for Regional Resilience: Eastern Ontario's Agriculture Sector

Annual Sales from Region's Producers	Jobs (Direct and Spinoff) (Est. 2024)	Percentage of Total Private Sector Regional Economic Output	\$ Value of 10% Decline in Sales/Year
\$4.13 Billion	11,386	3.6%	\$413 Million

Agriculture - farms and related support activities - is a **\$4 billion / year business in Eastern Ontario**. This is the third-largest private sector industry in the region (after manufacturing as a whole, of which resins & rubber is the region's leading sub-sector).

An upstream sector, food manufacturing, **exports \$3.4 billion / year** out of the region and agriculture itself exports nearly as much: **\$2.7 billion**. Without trade disruption, agriculture was projected to remain stable through to the end of the decade. A 10% decline in agricultural sales represents a revenue loss of \$413 million annually. Direct and spinoff job losses: 1,493.

Job Impacts in Eastern Ontario of a 10% Decline in Sales in Agriculture Sector





Agriculture: the Region's Fourth Largest Export Sector



In-region Purchases



Imported Purchases (from outside the region)



Exports out of Region (% of total Sales)

Eastern Ontario's agriculture sector is able to supply roughly three-quarters of its own inputs and labour, and imports the balance of its requirements (\$571 million). The sector **exports nearly half of its total production** to markets outside the region.

The region's agricultural sector is the fourth largest export sector, after resins & rubber, food manufacturing, and electrical equipment. Trade disruption could dramatically reduce overall sales and specifically exports. Exports are **dependent on the balance between international and intra-provincial or interprovincial trade**. A 10% decline in sales would mean a **\$60 million decline in payroll and -1,493 fewer jobs**.



\$1.19 Billion in Inputs Comes from Five Supply Chain Partners

The agriculture sector relies heavily on **chemical manufacturing** (\$584/year million) as well as **animal food manufacturing** (\$346 million) and the **energy sector** - both petroleum-based and electricity (\$226 million). Reduced purchases from the agriculture sector due to trade disruption puts \$1.19 billion of economic activity at risk along with associated jobs.

Sector	Top 5 Subsectors Affected	\$ Value of Purchases from Subsectors
Agriculture	Pesticides, fertilizer and other agricultural chemical manufacturing	\$548,663,096
	Animal food manufacturing	\$346,995,825
	Petroleum and coal product manufacturing	\$135,479,501
	Electrical power generation, transmission and distribution	\$65,585,022
	Grain and oilseed milling	\$56,542,192
	Total at risk:	\$1.189 billion

Data source: Lightcast
Sector Definition by NAICS Code:
1110 - Farms
1150 - Support activities for farms

