

**APPENDIX 29-B**  
**NISGA'A BUSINESS SURVEY STATISTICAL REPORT**

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Seabridge Gold Inc.

**KSM PROJECT**  
**Nisga'a Business Survey**  
**Statistical Report**

**SEABRIDGE GOLD**



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# KSM PROJECT

## NISGA'A BUSINESS SURVEY STATISTICAL REPORT

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Prepared for:

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Seabridge Gold Inc.

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## Executive Summary

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The Nisga'a Lisims Government has developed Economic, Social, and Cultural Impact Assessment Guidelines for environmental assessments subject to the Nisga'a Final Agreement.

The Kitsault Mine Project, proposed by Avanti Mining Inc., and the KSM Project, proposed by Seabridge Gold Inc. are in the pre-application phase of the environmental assessment process under the guidance of the British Columbia Environmental Assessment Office and the Canadian Environmental Assessment Agency. Environmental assessments for both projects are subject to the Nisga'a Final Agreement.

This statistical report presents the results of the statistical analysis of the business survey of registered Nisga'a businesses. The primary purpose of the survey was to collect relevant information to address the Economic, Social, and Cultural Impact Assessment Guidelines and to support the environmental, social, economic, and cultural effects assessments that are being carried out for both projects. The British Columbia Environmental Assessment Office and the Canadian Environmental Assessment Agency have requested that Avanti Mining Inc. and Seabridge Gold Inc. work together on certain components of the research, including the survey work.

Data was collected through primary research, using two modalities: face-to-face and telephone interviews. A total of 22 Nisga'a business surveys were completed by businesses and village government officials from four Nisga'a villages. These included bed-and-breakfast, catering, construction, courier, tour, and confection store businesses, as well as village government commercial enterprises and public works.

The majority of the businesses surveyed were small operations (one to two people) that reported having the flexibility to hire additional staff on short notice. In contrast, village government-run enterprises and departments reported employing an established team of personnel and occasionally hiring seasonal staff for larger projects.

Of the businesses surveyed, the construction, public works, and government commercial groups expressed the most interest in the projects. Businesses in these three categories were interested in possible joint ventures, and reported possessing the equipment, capacity, technical knowhow, and resources to undertake work related to the projects. These categories also included the largest businesses (in terms of annual revenues and levels of capital assets) that participated in the survey.

The confectionary store, bed-and-breakfast, and catering businesses expressed the least interest in providing services to the projects. These businesses saw the distance from the Project sites as the largest obstacle in being able to provide services, and that the projects would therefore not affect them in any meaningful way nor result in local economic effects.

Survey respondents reported to be interested in (and to be able to perform at their current business size) contracts ranging from as little as \$300 to as high as \$30 million. Overall, there was great interest in supplying goods and services to the projects. More than 90% of respondents reported a degree of interest in being a supplier during either the Construction or Operation phase.

The main challenges to Nisga'a businesses resulting from the projects were perceived to be (1) limited businesses opportunities (if the mines are union sites), (2) inflation in local prices or wages, and (3) shortage of qualified workers. To assist businesses in securing work at the mines, respondents consistently recommended direct negotiations as opposed to competitive bids, early payment

arrangements, and smaller-sized contracts (which were regarded as likely to assist businesses by more than one-half of respondents). Approximately one-half of businesses had participated in competitive bidding process, but fewer than 30% reported providing proposals or technical specifications as the usual basis for being awarded contracts.

## Acknowledgements

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# KSM PROJECT

## NISGA'A BUSINESS SURVEY STATISTICAL REPORT

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Appendix A. Nisga’a Business Survey

## Acronyms and Abbreviations

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Terminology used in this document is defined where it is first used. The following list will assist readers who may choose to review only portions of the document.

<b>Avanti</b>	Avanti Mining Inc.
<b>BC</b>	British Columbia
<b>BC EAO</b>	British Columbia Environmental Assessment Office
<b>CEAA</b>	Canadian Environmental Assessment Agency
<b>EAO</b>	Environmental Assessment Office
<b>ESCIA</b>	Economic, Social, and Cultural Impact Assessment
<b>Nisga'a villages</b>	Kincolith (now Gingolx), Greenville (now Laxgalts'ap), Canyon City (now Gitwinksihlkw), and New Aiyansh (now Gitlaxt'aamiks)
<b>HSE</b>	Health, Safety and Environment
<b>KMP</b>	Kitsault Mine Project
<b>NFA</b>	Nisga'a Final Agreement
<b>NLG</b>	Nisga'a Lisims Government
<b>Projects, the</b>	The KSM and Kitsault Mine projects
<b>Rescan</b>	Rescan Environmental Services Ltd.
<b>Seabridge</b>	Seabridge Gold Inc.
<b>Q</b>	Question (e.g., Q25A)
<b>Work Plan, the</b>	A Work Plan for the Nisga'a Economic, Social, and Cultural Impact Assessment

# 1. Introduction

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The Nisga'a Final Agreement (NFA) requires that all environmental assessment processes, as defined in the NFA, "assess the effects of the project on the existing and future economic, social and cultural well-being of Nisga'a citizens who may be affected by the project" (NLG 2008). To meet this requirement, the Nisga'a Lisims Government (NLG) has developed Economic, Social and Cultural Impact Assessment (ESCIA) Guidelines to be used in environmental assessments subject to the NFA.

A work plan for the Nisga'a ESCIA (the Work Plan) was developed to address the Nisga'a ESCIA Guidelines as they apply to the Kitsault Mine Project (KMP) proposed by Avanti Mining Inc. (Avanti), and the KSM Project proposed by Seabridge Gold Inc. (Seabridge). This work is required as part of the British Columbia Environmental Assessment Office (BC EAO) and Canadian Environmental Assessment Agency's (CEAA) environmental assessment processes. The BC EAO and CEAA have requested that Avanti and Seabridge work together on certain components of the research, including the survey work.

Both projects (hereafter referred to as the Projects) are undergoing the BC *Environmental Assessment Act* (2002) process and are also subject to the *Canadian Environmental Assessment Act* (1992). Since the KMP is located within the Nass Wildlife Area and the Nass Area, as defined in the NFA, and KSM is located partly within the Nass Area, the Projects' environmental assessments are also subject to the NFA.

As part of the scope defined by the ESCIA Guidelines, the assessment of economic impacts is to include an analysis of the effects on Nisga'a business activities, earnings, and investment activity; as well as an analysis of Nisga'a Nation capacity in relation to the goods and services required by the Projects.

The Nisga'a Business Survey was undertaken to collect relevant information to address the ESCIA Guidelines and the Work Plan, and to support assessment of the Projects' potential economic effects on Nisga'a businesses. This report presents the results of the Nisga'a Business Survey.

## 2. Method

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### 2.1 SURVEY DESIGN AND IMPLEMENTATION

The Business Survey was developed in consultation with the NLG, BC EAO, CEAA, Avanti, and Seabridge. The scope of questions in the Nisga'a Business Survey addressed aspects of the Projects' potential economic effects, focusing on issues that are relevant to the proposed Projects. The survey instrument is provided in Appendix A.

For the purposes of this survey and the assessments as specified by the ESCIA Guidelines, Nisga'a businesses include businesses owned, controlled, or partnered with the NLG and Nisga'a citizens: that is, businesses owned in whole or in part by Nisga'a individuals or the NLG.

The NLG legal counsel provided a preliminary list of businesses and organizations to be invited to participate in the Business Survey, which included village government officials knowledgeable of and involved with community economic development. After elimination of duplicate entries and businesses not in operation, and addition of three businesses identified by Rescan during field work, a target population of 32 contacts was confirmed. Twenty-nine contacts were in Kincolith (now Gingolx), Greenville (now Laxgalts'ap), Canyon City (now Gitwinksihkw), and New Aiyansh (now Gitlaxt'aamiks)—hereafter referred to as the Nisga'a villages—and three contacts were in Terrace or Prince Rupert.

Initial contact with each business or organization was made by telephone, and an introductory letter regarding the research, including a Joint Survey Endorsement Letter from the NLG, was provided. Concerted efforts were made to contact all 32 businesses and organizations in the survey population to request participation in the survey.

The survey was administered face-to-face, or by telephone if face-to-face meetings could not be arranged. The same questions were administered in both face-to-face and telephone interviews, and the same survey script was used for both approaches (see Appendix A). Participants were e-mailed, couriered, or faxed a copy of the survey prior to the interview so that they could familiarize themselves with its contents.

A total of 22 surveys were completed. Thirteen surveys were conducted by telephone and nine were conducted in person. All 22 completed surveys were from contacts in the Four Nisga'a villages. The respondents' business/organization types are provided in Table 2.1-1.

**Table 2.1-1. Nisga'a Business Surveys Completed by Business/Organization Type**

Business/Organization Type	Number of Businesses
Bed-and-breakfast accommodation	5
Catering	3
Construction	2
Courier/transportation	1
Tour operator	1
Confection store	1
Village government commercial enterprise	3
Village government public works	2
Village government	4
<b>Total</b>	<b>22</b>

## 2.2 GUIDE TO READING AND INTERPRETING THE TABLES

To allow for easy cross-referencing with the survey document (Appendix A), the survey question numbers are retained throughout this report (i.e., indicated in the table titles). The full text of the questions, as they were asked, has been shortened for display in this report; the essence of the questions has been retained. Similarly, the codes assigned to response categories have also been retained, and are displayed in the interest of possible future use of the data and results.

Frequency tables have either two or three columns:

- **frequency:** provides the number of respondents answering in a particular category;
- **valid percent:** provides the frequency converted to a percentage by dividing by the number of respondents who gave valid responses, which excludes “No Response,” “Don’t Know,” and “Refusal”; and
- **cumulative percent:** provides the cumulative percentage for questions with a natural ordering to the categories, such as seven-point scales or actual values (e.g., number of members in a household).

Multiple response tables have three columns:

- **count:** provides the number of responses in each category; the total may exceed the number of respondents since more than one answer is allowed;
- **percent of responses:** provides the percentage of responses in each category; the total percent of responses is 100%;
- **percent of cases:** provides the percentage of responses in each category out of the number of valid cases (that is, number of responses excluding “No Response,” “Don’t Know,” and “Refusal”); the total percent of cases may exceed 100%, since respondents were allowed to give multiple answers.

## 3. Results

### 3.1 OVERVIEW OF BUSINESSES

#### 3.1.1 Ownership, Duration of Business, and Management

Of the 22 businesses that completed the survey, 54.5% had a sole proprietor and 36.4% were Nisga'a Village Corporations. Only one business was an incorporated private company and one business was an NLG Corporation (Table 3.1-1).

**Table 3.1-1. Business Ownership Structure (Q2)**

Ownership Structure	Frequency	Valid Percent	Cumulative Percent
Sole Proprietorship	12	54.5%	54.5%
Private Company (Incorporated)	1	4.5%	59.1%
Nisga'a Village Corporation	8	36.4%	95.5%
NLG Corporation	1	4.5%	100.0%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>n/a</b>

*Notes: Valid percent totals may not sum to 100% because of rounding error.*

Most businesses are Nisga'a Citizen owned (13 businesses or 59%; Table 3.1-2). Six businesses are wholly owned by the Nisga'a villages and one business is owned in whole by the NLG. One business is jointly owned by a Nisga'a village and the NLG, and one business is jointly owned by the NLG and a Nisga'a citizen.

**Table 3.1-2. Ownership Breakdown (Q4)**

Ownership	Frequency	Valid Percent	Cumulative Percent
100% Nisga'a Citizen ownership	13	59%	59%
100% Nisga'a Village Corporation ownership	6	27%	86%
100% Nisga'a Corporation ownership	1	5%	91%
10% Nisga'a Village Corporation ownership and 90% Nisga'a Corporation ownership	1	5%	95%
1% Nisga'a Village Corporation ownership and 99% Nisga'a Citizen ownership	1	5%	100%
<b>Total</b>	<b>22</b>	<b>100%</b>	<b>n/a</b>

*Notes: Percent totals may not sum to 100% because of rounding error.*

The oldest business was founded in 1970 (a Nisga'a Village Corporation), while the newest was founded in 2011. About one-third of businesses have been operating for less than ten years (Table 3.1-3) and most of them have been under the same management since their inception.

#### 3.1.2 Main Sectors of Operation and Goods and Services Provided

The sector occupied by each business was recorded as a multiple response (i.e., survey participants were asked to select all sectors that applied). On average, respondents reported operating in four sectors. A wide range of sectors were reported (Table 3.1-4). Four businesses (about 20% of respondents) have worked in the mining, quarrying, oil and gas sector. Six businesses (27.3%) have

worked in the construction sector, five in the forestry sector (22.7%), and another five (22.7%) in the transportation sector. Most respondents (14 or 63.6%) indicated that their businesses have worked in the tourism/accommodation/food services sector.

**Table 3.1-3. Date Business was Founded (Q5)**

Year Founded	Frequency	Valid Percent	Cumulative Percent
1970	1	4.8%	4.8%
1991	1	4.8%	9.6%
1992	1	4.8%	14.4%
1995	2	9.5%	23.9%
1997	1	4.8%	28.7%
1999	1	4.8%	33.5%
2000	4	19.0%	52.5%
2001	3	14.3%	66.8%
2002	2	9.5%	76.3%
2004	1	4.8%	81.1%
2006	1	4.8%	85.9%
2010	2	9.5%	95.4%
2011	1	4.8%	100.0%
<b>Total</b>	<b>21</b>	<b>100.0%</b>	<b>n/a</b>

*Notes: Information was unavailable for one case. Valid percent totals may not sum to 100% because of rounding error.*

**Table 3.1-4. Main Sectors Occupied by Businesses (Q7, Multiple Responses)**

Sectors	Frequency	Percent of Responses	Percent of Cases
Tourism/Accommodation/Food Services	14	17.7%	63.6%
Retail and Wholesale Sales	7	8.9%	31.8%
Other Services (incl. Gov't)	4	5.1%	18.2%
Information, Culture, and Recreation	7	8.9%	31.8%
Cultural Industries	5	6.3%	22.7%
Health Care & Social Assistance	3	3.8%	13.6%
Professional Scientific	1	1.3%	4.5%
Manufacturing	2	2.5%	9.1%
Mining, Quarrying, Oil, Gas	4	5.1%	18.2%
Educational Services	3	3.8%	13.6%
Business, Building & Other Support Services	7	8.9%	31.8%
Transportation	5	6.3%	22.7%
Utilities	1	1.3%	4.5%
Fishing	5	6.3%	22.7%
Forestry	5	6.3%	22.7%
Construction	6	7.6%	27.3%
<b>Total</b>	<b>79</b>	<b>100.0%</b>	<b>n/a</b>

*Notes: Percent of cases is based on 22 valid cases. Percent of responses may not sum to 100% because of rounding error. Total percent of cases exceeds 100% due to multiple responses.*

Goods and services provided by the businesses were also recorded as a multiple response. More than one-third of businesses have provided infrastructure and maintenance services. About 27% have provided catering services, and another 27% have provided accommodation and food services (Table 3.1-5). Three businesses (13.6%) have provided construction and earth works services and two (9.1%) have provided transportation services. On average, each business reported having provided two services.

**Table 3.1-5. Main Services and Goods Provided (Q8, Multiple Responses)**

Services and Good Provided	Frequency	Percent of Responses	Percent of Cases
Catering	6	14.3%	27.3%
Accommodation/ Food Services	6	14.3%	27.3%
Retail	3	7.1%	13.6%
Transportation	2	4.8%	9.1%
Business Services	2	4.8%	9.1%
Social/ Educational Services	1	2.4%	4.5%
Resource Harvesting	4	9.5%	18.2%
Utilities	2	4.8%	9.1%
Tourism /Recreation Services	1	2.4%	4.5%
Garbage Collection	2	4.8%	9.1%
Snow Removal	2	4.8%	9.1%
Construction and Earth Works	3	7.1%	13.6%
Infrastructure and Maintenance	8	19.0%	36.4%
<b>Total</b>	<b>42</b>	<b>100.0%</b>	<b>n/a</b>

*Notes: Percent of cases is based on 22 valid cases. Percent of responses may not sum to 100% because of rounding error. Total percent of cases exceeds 100% due to multiple responses.*

### 3.1.3 Main Costs and Risks Faced by Businesses

The most-reported costs of running the business, mentioned by over 50% of respondents, were infrastructure and equipment maintenance, supplies, and fuel and transportation. The cost of personnel and of hydro and gas were equally mentioned by more than 30% of respondents (Table 3.1-6).

**Table 3.1-6. Main Costs of Running Business (Q9, Coded, Multiple Responses)**

Costs	Frequency	Percent of Responses	Percent of Cases
Fuel/ Transportation	11	22.0%	50.0%
Hydro/ Gas	7	14.0%	31.8%
Supplies	12	24.0%	54.5%
Personnel	7	14.0%	31.8%
Infrastructure and Equipment Maintenance	13	26.0%	59.1%
<b>Total</b>	<b>50</b>	<b>100.0%</b>	<b>n/a</b>

*Notes: Percent of cases is based on 22 valid cases. Percent of responses may not sum to 100% because of rounding error. Total percent of cases exceeds 100% due to multiple responses.*

About two-thirds of respondents reported demand volatility as the major risk faced by their business (Table 3.1-7). The second most-reported risk was loss of infrastructure. Other notable risks mentioned were equipment depreciation, highway conditions, personnel health and safety, supplies on hand, and insurance.



**Table 3.1-7. Main Risks Faced by Business (Q10, Coded, Multiple Responses)**

Risks	Frequency	Percent of Responses	Percent of Cases
Demand	13	46.4%	65.0%
Insurance	1	3.6%	5.0%
Supplies on hand	1	3.6%	5.0%
Health & safety of personnel	2	7.1%	10.0%
Highway conditions/access	3	10.7%	15.0%
Loss of infrastructure	5	17.9%	25.0%
Equipment depreciation	3	10.7%	15.0%
<b>Total</b>	<b>28</b>	<b>100.0%</b>	<b>n/a</b>

*Notes: Percent of cases is based on 22 valid cases. Percent of responses may not sum to 100% because of rounding error. Total percent of cases exceeds 100% due to multiple responses.*

### 3.2 EMPLOYEES, CLIENTS AND CUSTOMERS

Most businesses employed male Nisga'a workers (Table 3.2-1). Of the total employees working in the businesses interviewed, 68.2% were Nisga'a males, 27.7% were Nisga'a females, and 0.5% were non-Nisga'a males.

**Table 3.2-1. Employee Composition of Businesses (Q11)**

Business	Number of Nisga'a Males	Number of Nisga'a Females	Number of Other Males	Number of Other Females	Total Number of Employees
1	0	1	1	0	2
2	0	1	0	0	1
3	14	6	1	0	21
4	4	0	0	0	4
5	0	1	0	0	1
6	1	0	0	0	1
7	1	2	0	0	3
8	2	3	0	0	5
9	0	1	0	0	1
10	1	1	0	0	2
11	1	1	0	0	2
12	1	0	0	0	1
13	38	2	2	0	42
14	94	30	5	0	129
15	15	24	1	0	40
16	0	1	0	0	1
17	14	0	0	0	14
18	6	4	0	0	10
19	0	1	0	0	1
20	1	0	0	0	1
21	2	1	0	0	3
22	2	0	2	0	4
<b>Total</b>	<b>197</b>	<b>80</b>	<b>12</b>	<b>0</b>	<b>289</b>
<b>Average</b>	<b>9.0</b>	<b>3.6</b>	<b>0.5</b>	<b>0.0</b>	<b>13.1</b>

About 36% of businesses (8) comprised one employee (Table 3.2-1). Nearly three-quarters of businesses (16) had five employees or less, while four businesses had more than 20 employees. One business had over one hundred employees.

Approximately 68% of businesses (15) had Nisga'a or municipal governments as clients, representing on average approximately 56% of their customer base (Table 3.2-2). The reliance of businesses on Nisga'a or municipal governments, being the main client of interviewed businesses, ranged from as little as 5% of their customer base to a single-client dependency (or 100% of customer base).

**Table 3.2-2. Customer Base over the Past 12 Months (Q14)**

Customer Base	Valid Number (> 0%)	Minimum	Maximum	Mean (of valid number)	Mean (of all responses)
Individual consumers	14	5.0%	100.0%	40.7%	25.9%
Other companies	11	5.0%	100.0%	44.5%	22.3%
Nisga'a or municipal governments	15	5.0%	100.0%	55.7%	38.0%
Provincial or Federal governments	5	5.0%	20.0%	10.0%	2.3%
Social or educational agencies or institutions	6	20.0%	70.0%	39.2%	10.7%

Notes: Based on 22 valid cases.

The second most important clients were individual consumers, reported by 63.6% of businesses (14) and representing on average approximately 40% of their customer base. Among these businesses, the level of dependency also ranged from 5 to 100% of their customer base.

Half of the businesses also provided services to other companies, representing on average 44.5% of their customer base. Six businesses reported having social or educational agencies as important clients; five reported that provincial and federal governments were important clients.

Most businesses (13 or 59.1%) had more than 25 customers over the past 12 months. Four businesses had between 2 to 5 customer, two businesses had between 6 to 10 customers, and three businesses had between 6 to 10 customers (Table 3.2-3).

**Table 3.2-3. Number of Clients or Customers during the Past 12 Months (Q15)**

Number of Customers	Frequency	Percent of Businesses	Valid Percent
1	0	0.0%	0.0%
2 to 5	4	18.2%	18.2%
6 to 10	2	9.1%	27.3%
11 to 25	3	13.6%	40.9%
More than 25	13	59.1%	100.0%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	

Notes: Percent totals may not sum to 100% because of rounding error.

Respondents reported that their clients were engaged in a wide range of industries (Table 3.2-4). The top three client industries reported by respondents were other services (which included government), educational services, and health care and social assistance.

**Table 3.2-4. Industries in which Clients are Engaged (Q16, Multiple Responses)**

Industries	Frequency	Percent of Responses	Percent of Cases
Agriculture	1	0.8%	4.8%
Forestry	9	7.1%	42.9%
Fishing	10	7.9%	47.6%
Mining, Quarrying, Oil and Gas	7	5.6%	33.3%
Utilities	5	4.0%	23.8%
Construction	12	9.5%	57.1%
Manufacturing	3	2.4%	14.3%
Service-Producing Sector	3	2.4%	14.3%
Retail and Wholesale Sales	8	6.3%	38.1%
Transportation and Warehousing	3	2.4%	14.3%
Finance, Insurance, Real Estate and Leasing	1	0.8%	4.8%
Professional, Scientific, and Technical Services	5	4.0%	23.8%
Business, Building, and Other Support Services	6	4.8%	28.6%
Educational Services	13	10.3%	61.9%
Health Care and Social Assistance	12	9.5%	57.1%
Information, Culture & Recreation	7	5.6%	33.3%
Tourism, Accommodation, and Food Services	7	5.6%	33.3%
Other Services (incl. Gov't)	14	11.1%	66.7%
<b>Total</b>	<b>126</b>	<b>100.0%</b>	<b>n/a</b>

Notes: Percent of cases is based on 21 valid cases (information for one case was missing). Percent of responses may not sum to 100% because of rounding error. Total percent of cases exceeds 100% due to multiple responses.

More than half of respondents reported that their clients were engaged in the construction industry. Another 47.6% had clients engaged in the fishing industry, and 42.9% had clients in the forestry industry. Seven businesses had clients in the mining, quarrying, oil and gas industry, and three businesses had clients in the transport and warehousing industry.

### 3.3 FUTURE BUSINESS EXPECTATIONS

#### 3.3.1 Without Projects

Most respondents (81.8%) expected their business to grow over the next ten years (Table 3.3-1). About 18% expected their business to remain the same size, and no one anticipated her business to shrink. The main reasons given for expected business growth were: new projects starting in the area, intentions to expand to other markets, and community growth.

**Table 3.3-1. Expected Size of Business over the Next 10 Years (Q17)**

Expected Business Size	Frequency	Percent of Responses	Percent of Cases
Remain about the same	4	18.2%	18.2%
Grow	18	81.8%	100.0%
Shrink	0	0.0%	100.0%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>n/a</b>

Notes: Percent of cases is based on 22 valid cases. Percent of responses may not sum to 100% because of rounding error. Total percent of cases exceeds 100% due to multiple responses.

The two main factors that could limit business growth are capital and existing plant and equipment capacity, mentioned by 81% and 66.7% of respondents respectively (Table 3.3.2). Other important growth-limiting factors reported were skilled labour and demand constraints.

**Table 3.3-2. Main Factors that Limit Business Growth (Q19, Multiple Responses)**

Factors Limiting Business Growth	Frequency	Percent of Responses	Percent of Cases
Capital	17	35.4%	81.0%
Existing plant & equipment	14	29.2%	66.7%
Supplies	1	2.1%	4.8%
Skilled labour	9	18.8%	42.9%
Demand	6	12.5%	28.6%
Concerns about quality or reliability	1	2.1%	4.8%
<b>Total</b>	<b>48</b>	<b>100.0%</b>	<b>n/a</b>

*Notes: Percent of cases is based on 22 valid cases. Percent of responses may not sum to 100% because of rounding error. Total percent of cases exceeds 100% due to multiple responses.*

### 3.3.2 With Projects

Just over four-fifths of businesses have not previously worked for or with a mining company (Table 3.3-3), while about one-fifth (four businesses) have. Regardless of their experience working with mining companies, most respondents (over 90%) expressed interest in becoming suppliers to the Projects (Table 3.3-4).

**Table 3.3-3. Experience Working for or with a Mining Company (Q20)**

Previous Experience with Mining Company?	Frequency	Percent	Valid Percent
Yes	4	18.2%	18.2%
No	18	81.8%	81.8%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>100.0%</b>

**Table 3.3-4. Interest in being a Supplier of Goods or Services to a Mining Company (Q21)**

Previous Experience with Mining Company?	Frequency	Percent	Valid Percent
Yes	20	90.9%	90.9%
No	2	9.1%	9.1%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>100.0%</b>

## 3.4 BUSINESS INTEREST IN THE PROJECTS

Overall, there is a high interest in supplying services to the Projects. Over 76% (or 16) respondents reported being interested in supplying services to the Projects during the Construction phase. Another 14.3% (3) expressed that they may be interested, while 9.5% (2) respondents would not be interested at all. One business refused to respond this question (Table 3.4-1).

Interest in business opportunities during the Construction phase was assessed on a seven-point scale (called a Likert scale), ranging from “not at all interested” to “extremely interested” (Table 3.4-2). The mean value of the response is below the midpoint of 4 with respect to most business opportunity areas (Table 3.4-3). This is as expected because of differences in each business’s areas of operation (i.e., the goods and services that are provided) and, therefore, in the opportunities that businesses may be interested in pursuing.

**Table 3.4-1. Interest in Being a Supplier of Goods or Services to the Mines during Construction (Q22)**

Interested in Being a Supplier	Frequency	Percent	Valid Percent
Yes	16	72.7%	76.2%
No	2	9.1%	9.5%
Maybe	3	13.6%	14.3%
<b>Total Valid Responses</b>	<b>21</b>	<b>95.5%</b>	<b>100.0%</b>
Missing	1	4.5%	
<b>Total</b>	<b>22</b>	<b>100.0%</b>	

**Table 3.4-2. Business Opportunities of Interest during Mine Construction (Q23, if Q22=Yes or Maybe)**

Business Opportunities	Not At All Interested			Extremely Interested			
	1	2	3	4	5	6	7
Camp Construction	42.1%	5.3%	0.0%	0.0%	10.5%	10.5%	31.6%
Earthworks	42.1%	0.0%	0.0%	0.0%	10.5%	0.0%	47.4%
Surveying	63.2%	0.0%	10.5%	10.5%	5.3%	5.3%	5.3%
Medical Services	52.6%	5.3%	5.3%	10.5%	5.3%	5.3%	15.8%
Environmental Monitoring	42.1%	5.3%	15.8%	10.5%	5.3%	10.5%	10.5%
Expansion to an existing camp	47.4%	0.0%	0.0%	0.0%	15.8%	0.0%	36.8%
Batch Plant	42.1%	5.3%	5.3%	5.3%	10.5%	5.3%	26.3%
Security	57.9%	0.0%	0.0%	5.3%	5.3%	5.3%	26.3%
General Site Services	36.8%	0.0%	5.3%	0.0%	10.5%	5.3%	42.1%
Clearing and Logging	52.6%	0.0%	0.0%	0.0%	15.8%	0.0%	31.6%
Catering	36.8%	0.0%	0.0%	5.3%	5.3%	5.3%	47.4%
Fuel Supply	42.1%	0.0%	10.5%	5.3%	10.5%	5.3%	26.3%
Personnel Transport	36.8%	0.0%	10.5%	5.3%	10.5%	0.0%	36.8%

Of the 19 respondents that were somewhat interested in becoming suppliers to the Projects (Q22=yes or maybe), more than half expressed high interest in catering work (a score of 6 or 7, referred to as the Top Box in Table 3.4-3). Another 47.2% expressed high interest in earthworks and general site services. Camp services opportunities were also of high interest to about 42% of businesses.

The less desired business opportunity areas were surveying and medical services, with 63.2% and 57.9% of respondents not interested in providing such services (a score of 1 or 2, referred to as the Low Box in Table 3.4-3). Conversely, only 10.6% and 21.1% of respondents, respectively, expressed high interest in providing services in those areas (Top Box; Table 3.4-3).

Interest on business opportunities during the Operation phase was slightly lower than during the Construction phase. About 63% (or 14) respondents expressed being interested in supplying services to the Projects during the Operation phase (Table 3.4-4). Another 18.2% (4) reported that they were somewhat interested, while 18.2% (2) respondents expressed that they would not be interested at all (Table 3.4-4). Accounting for overlap, more than 90% respondents (20) reported a degree of interest in supplying services during at least one of the two phases of the Projects (responded “yes” or “maybe” to either Q22 or Q24).

**Table 3.4-3. Descriptive Statistics of Interest in Business Opportunities during Mine Construction (Q23)**

	Valid Number	Mean	Top Box (6,7)	Low Box (1,2)
Camp Construction	19	3.89	42.1%	47.4%
Earthworks	19	4.26	47.4%	42.1%
Surveying	19	2.32	10.6%	63.2%
Medical Services	19	2.89	21.1%	57.9%
Environmental Monitoring	19	3.05	21.0%	47.4%
Expansion to an existing camp	19	3.84	36.8%	47.4%
Batch Plant	19	3.58	31.6%	47.4%
Security	19	3.21	31.6%	57.9%
General Site Services	19	4.32	47.4%	36.8%
Clearing and Logging	19	3.53	31.6%	52.6%
Catering	19	4.47	52.7%	36.8%
Fuel Supply	19	3.63	31.6%	42.1%
Personnel Transport	19	4.00	36.8	36.8

**Table 3.4-4. Interest in Being a Supplier of Goods or Services to the Mines during Operation (Q24)**

	Frequency	Percent	Valid Percent
Yes	14	63.6%	63.6%
No	4	18.2%	18.2%
Maybe	4	18.2%	18.2%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>100.0%</b>

As for the Construction phase, business opportunities of interest for the Operation phase were assessed on a Likert scale, ranging from “not at all interested” to “extremely interested” (Table 3.4-5). Of the 18 respondents that expressed some interest in supplying to the Projects during the Operation phase (Q24=yes or maybe), one-half expressed high interest (Top Box, Table 3.4-6) in supplying general site services or road maintenance / snow removal. Another 44.5% expressed high interest in camp catering and 38.9% expressed high interest in personnel transport. The average on the seven-point scale for being interested in the before-mentioned services was above the midpoint of 4 (Table 3.4-6), indicating an overall high degree of interest in supplying those services. Three respondents indicated that they were extremely interested (a score of 7) in providing other services such as road construction, management and cultural monitoring (recorded as “other” in Tables 3.4-5 and 3.4-6).

**Table 3.4-5. Interest in Business Opportunities during Mine Operation (Q25, if Q22=Yes or Maybe)**

	Not At All Interested			Extremely Interested			
	1	2	3	4	5	6	7
Camp Catering	38.9%	0.0%	0.0%	11.1%	5.6%	5.6%	38.9%
General Site Services	38.9%	0.0%	0.0%	0.0%	11.1%	0.0%	50.0%
Re-vegetation, sample plots	38.9%	11.1%	0.0%	5.6%	5.6%	11.1%	27.8%
Road Maintenance/ Snow Removal	44.4%	0.0%	0.0%	0.0%	5.6%	5.6%	44.4%
Personnel Transport	22.2%	0.0%	16.7%	11.1%	11.1%	0.0%	38.9%
Environmental Monitoring	50.0%	5.6%	11.1%	11.1%	5.6%	5.6%	11.1%

*(continued)*

**Table 3.4-5. Interest in Business Opportunities during Mine Operation (Q25, if Q22=Yes or Maybe) (completed)**

	Not At All Interested			Extremely Interested			
	1	2	3	4	5	6	7
Medical Services	50.0%	0.0%	0.0%	16.7%	11.1%	5.6%	16.7%
Fuel Supply	44.4%	0.0%	11.1%	5.6%	0.0%	0.0%	38.9%
Concentrate Transport	44.4%	0.0%	11.1%	11.1%	5.6%	0.0%	27.8%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

**Table 3.4-6. Descriptive Statistics of Interest in Business Opportunities during Mine Operations (Q25)**

	Valid Number	Mean	Top Box (6,7)	Low Box (1,2)
Camp Catering	18	4.17	44.5%	38.9%
General Site Services	18	4.44	50.0%	38.9%
Re-vegetation, sample plots	18	3.72	38.9%	50.0%
Road Maintenance/ Snow Removal	18	4.17	50.0%	44.4%
Personnel Transport	18	4.44	38.9%	22.2%
Environmental Monitoring	18	2.78	16.7%	55.6%
Medical Services	18	3.22	22.3%	50.0%
Fuel Supply	18	3.72	38.9%	44.4%
Concentrate Transport	18	3.44	27.8%	44.4%
Other	3	7.00	100.0%	0.0%

### 3.5 BUSINESS PERCEPTIONS OF THE PROJECTS

The following tables report on respondents' attitudes about the business opportunities and challenges that a mine in the region could bring to the local economy and their own businesses. Questions 26, 28, 31 and 32 were multi-part questions comprising a number of items assessed using a Likert scale, ranging from "not at all likely" to "extremely likely."

#### 3.5.1 Perceptions on Business Opportunities to the Region

On average, respondents reported positive perceptions about the opportunities a mining project would bring to the region (Tables 3.5-1 and 3.5-2; mean scores greater than 5 for all aspects). A high proportion of respondents expected the Projects to be extremely likely to bring opportunities to the region (Table 3.5-1; a score of 7). More than two-thirds of respondents rated increase in local demand for goods and services and increase in local demand for local workforce as "very likely" (scores of 6 or 7) and at least half rated the impact on experience serving bigger contracts and improve local infrastructure as "very likely."

**Table 3.5-1. Business Opportunities from Mine in the Region (Q26)**

	Not At All Likely			Extremely Likely			
	1	2	3	4	5	6	7
Increased local demand for goods and services	13.6%	0.0%	4.5%	0.0%	13.6%	9.1%	59.1%
Increased local demand for local workforce	9.1%	4.5%	0.0%	4.5%	13.6%	9.1%	59.1%
Improved local infrastructure	4.5%	13.6%	13.6%	0.0%	18.2%	4.5%	45.5%
Experience serving bigger contracts	4.5%	4.5%	9.1%	0.0%	27.3%	13.6%	40.9%

**Table 3.5-2. Descriptive Statistics of Business Opportunities from Mine in the Region (Q26)**

	Valid Number	Mean	Top Box (6,7)	Low Box (1,2)
Increased local demand for goods and services	22	5.64	68.2%	13.6%
Increased local demand for local workforce	22	5.73	68.2%	13.6%
Improved local infrastructure	22	5.09	50.0%	18.2%
Experience serving bigger contracts	22	5.45	54.5%	9.1%

Fewer than 20% of respondents rated all four aspects as “not likely” (score of 1 or 2) and only one aspect (improved local infrastructure) was rated as “not likely” by more than 15% of respondents (Table 3.5-2).

Only two respondents expressed that their businesses is not able to take on additional work. Over 80% (or 18) reported that their businesses could take on more work and 9.1% (2) reported that their businesses may be able to take on some additional work (Table 3.5-3).

**Table 3.5-3. Business Ability to Take on More Work (Q27)**

	Frequency	Percent	Valid Percent
Yes	18	81.8%	81.8%
No	2	9.1%	9.1%
Maybe	2	9.1%	9.1%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>100.0%</b>

### 3.5.2 Perceptions on Potential Business Challenges

The single largest perceived business challenge related to capital and financing, with a mean of 3.95 and more than 30% respondents reporting it as a very likely challenge (Tables 3.5-4 and 3.5-5; Top Box). However, a larger proportion of respondents (40.9%) perceived this challenge as not likely (Low Box) than the proportion (31.8%) that perceived it as a very likely challenge (Top Box). In addition, 27.3% respondents perceived very likely challenges with existing equipment, and another 22.7% perceived very likely challenges with demand for their products or services (Table 3.5-5). Fewer than 10% perceived hiring skilled labour or product reliability as a very likely challenge (scores of 6 or 7). Overall, challenges all had mean scores of less than 4, meaning that the extent of the challenge is lower than neutral (Table 3.5-5).

**Table 3.5-4. Challenges or Opportunities Businesses Could Face (Q28)**

Challenge/Opportunity	Not At All Likely			Extremely Likely			
	1	2	3	4	5	6	7
Challenges w/ existing equipment	45.5%	13.6%	0.0%	9.1%	4.5%	4.5%	22.7%
Capital/ financing challenges	27.3%	13.6%	4.5%	4.5%	18.2%	4.5%	27.3%
Hiring skilled labour	31.8%	9.1%	18.2%	13.6%	18.2%	4.5%	4.5%
Increased demand for your products/services	27.3%	9.1%	4.5%	18.2%	18.2%	9.1%	13.6%
Concerns about product reliability	63.6%	18.2%	0.0%	9.1%	0.0%	0.0%	9.1%

Currently none of the surveyed businesses is a joint venture or partnership, but more than half of respondents (12) reported that they will be interested in a joint venture or partnership in order to take advantage of potential business opportunities (Table 3.5-6). Nine respondents reported that they would



not be interested. Of the 12 respondents interested in a joint venture or partnership, all of them would be interested in a venture with a non-Nisga'a business.

**Table 3.5-5. Descriptive Statistics of Challenges or Opportunities Businesses Could Face (Q28)**

	Valid Number	Mean	Top Box (6,7)	Low Box (1,2)
Challenges w/ existing equipment	22	3.18	27.3%	59.1%
Capital/ financing challenges	22	3.95	31.8%	40.9%
Hiring skilled labour	22	3.09	9.1%	40.9%
Increased demand for your products/services	22	3.73	22.7%	36.4%
Concerns about product reliability	22	2.00	9.1%	81.8%

**Table 3.5-6. Interest in a Joint Venture or Partnership to Take Advantage of Potential Business Opportunities (Q29)**

	Frequency	Percent	Valid Percent
Yes	12	54.5%	57.1%
No	9	40.9%	42.9%
<b>Total Valid Responses</b>	<b>21</b>	<b>95.5%</b>	<b>100.0%</b>
Missing	1	4.5%	
<b>Total</b>	<b>22</b>	<b>100.0%</b>	

Notes: One missing case. Percent totals may not sum to 100% because of rounding error.

### 3.5.3 Perceptions on Challenges that a Mine Could Bring to Businesses

The majority of respondents reported low scores on their perception of challenges that a mine could bring to their businesses (Table 3.5-7; scores 1, 2 or 3). On average they reported scores below the midpoint of 4 for all potential challenges (Table 3.5-8), meaning that the extent of a challenge is lower than neutral. Only “limited business opportunities if mines are union sites” was considered very likely to be a challenge for more than 36% of respondents (Table 3.5-8; Top Box). The remaining challenges were rated as very likely by fewer than 20% of respondents. “Shortage of supplies, “contracting packages beyond the capacity of my business” and “mines may directly hire some of my employees” were rated as very likely challenges by fewer than 10% of respondents. Conversely, “shortage of supplies” and “mines may directly hire some of my employees” were considered not likely a challenge by more than 75% of respondents (Table 3.5-8; Low Box).

**Table 3.5-7. Challenges Brought to Businesses because of Mine (Q31)**

	Not At All Likely			Extremely Likely			
	1	2	3	4	5	6	7
Shortage of qualified workers	45.5%	9.1%	4.5%	9.1%	13.6%	9.1%	9.1%
Inflation in local prices or wages	36.4%	13.6%	13.6%	0.0%	18.2%	9.1%	9.1%
Shortage of supplies	50.0%	27.3%	4.5%	4.5%	4.5%	4.5%	4.5%
Competitive bidding for work at mines	50.0%	13.6%	0.0%	9.1%	13.6%	0.0%	13.6%
Limited business opportunities if mines are union sites	45.5%	4.5%	0.0%	13.6%	0.0%	4.5%	31.8%
Contracting packages beyond the capacity of my business	45.5%	9.1%	0.0%	13.6%	22.7%	4.5%	4.5%
Mines may directly hire some of my employees	68.2%	9.1%	9.1%	0.0%	4.5%	0.0%	9.1%

**Table 3.5-8. Descriptive Statistics of Challenges Brought to Business because of Mine (Q31)**

	Valid Number	Mean	Top Box (6,7)	Low Box (1,2)
Shortage of qualified workers	22	3.00	18.2%	54.5%
Inflation in local prices or wages	22	3.14	18.2%	50.0%
Shortage of supplies	22	2.18	9.1%	77.3%
Competitive bidding for work at mines	22	2.77	13.6%	63.6%
Limited business opportunities if mines are union sites	22	3.59	36.4%	50.0%
Contracting packages beyond the capacity of my business	22	2.91	9.1%	54.5%
Mines may directly hire some of my employees	22	2.00	9.1%	77.3%

### 3.5.4 Measures that Could Assist Businesses in Securing Work at the Mines

The most recommended measures that could be taken by the Projects to assist business in securing work at the mines were “direct negotiations as opposed to competitive bids” and “early payment arrangements”, which were regarded as very likely to assist businesses by 57.1% and 52.4% of respondents, respectively (Tables 3.5-9 and 3.5-10; Top Box). Overall, “joint venture with other firms” and “shorter duration of contracts” were perceived as less likely to assist businesses (Table 3.5-10; means of 3.86 and 3.95, respectively); more respondents perceived them as not likely to assist their businesses (Table 3.5-10; Low Box) than as a very likely to assist them (Top Box). One respondent expressed a high interest in making Project plans available to local businesses one year in advance so that they could see the type of products and services that would be demanded by the Projects and plan ahead.

**Table 3.5-9. Measures that Would Assist in Securing Work at the Mines (Q32)**

	Not At All Likely				Extremely Likely		
	1	2	3	4	5	6	7
Smaller size of contracts	33.3%	4.8%	0.0%	14.3%	4.8%	19.0%	23.8%
Shorter duration of contracts	33.3%	4.8%	0.0%	14.3%	14.3%	9.5%	23.8%
Direct negotiations as opposed to competitive bid	23.8%	4.8%	4.8%	0.0%	9.5%	4.8%	52.4%
Financing Assistance	19.0%	9.5%	4.8%	4.8%	14.3%	0.0%	47.6%
Early payment arrangements	19.0%	4.8%	0.0%	14.3%	9.5%	9.5%	42.9%
Joint venture with mine developer	33.3%	9.5%	4.8%	0.0%	4.8%	9.5%	38.1%
Joint venture with other firms	33.3%	9.5%	9.5%	4.8%	4.8%	4.8%	33.3%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Notes: Percent of cases is based on 21 valid cases (one missing case).

**Table 3.5-10. Descriptive Statistics of Measures that Would Assist in Securing Work at the Mines (Q32)**

	Valid Number	Mean	Top Box (6,7)	Low Box (1,2)
Smaller size of contracts	21	4.05	42.9%	38.1%
Shorter duration of contracts	21	3.95	33.3%	38.1%
Direct negotiations as opposed to competitive bid	21	4.90	57.1%	28.6%
Financing Assistance	21	4.76	47.6%	28.6%
Early payment arrangements	21	4.90	52.4%	23.8%

(continued)

**Table 3.5-10. Descriptive Statistics of Measures that Would Assist in Securing Work at the Mines (Q32) (completed)**

	Valid Number	Mean	Top Box (6,7)	Low Box (1,2)
Joint venture with mine developer	21	4.14	47.6%	42.9%
Joint venture with other firms	21	3.86	38.1%	42.9%
Other	1	7.00	100.0%	0.0%

Notes: Percent of cases is based on 21 valid cases (one missing case).

### 3.6 PRE-QUALIFICATIONS FOR PROJECT WORK

This section addresses qualifications that might allow businesses to have an advanced position with respect to the procurement process for work related to the Projects.

Ten respondents reported that their businesses have General Liability Insurance coverage, ranging from \$1 million to \$20 million, while five businesses did not have any insurance. Seven respondents did not answer this question.

Twelve businesses had automobile liability insurance, ranging from \$1 million to \$5 million. One respondent reported not having such insurance, while nine did not respond to this question.

The size of contracts respondents reported to be interested in and able to perform at current business size, without investing any additional assets or hiring any additional staff, ranged from as little as \$300 to \$25 to \$30 million (Table 3.6-1). One-half of the respondents would be interested in contracts of \$25,000 or less, while five respondents (28%) would be interested in contracts of \$1 million or more.

**Table 3.6-1. Size of Contract Interested in and Able to Perform at Current Size (Q35)**

Size of Contract	Frequency	Valid Percent	Cumulative Percent
\$300	2	11.1%	11.1%
\$1,000	2	11.1%	22.2%
\$4,000	1	5.6%	27.8%
\$5,000	1	5.6%	33.3%
\$20,000	2	11.1%	44.4%
\$25,000	1	5.6%	50.0%
\$50,000	1	5.6%	55.6%
\$200,000	1	5.6%	61.1%
\$500,000	1	5.6%	66.7%
\$900.00/day	1	5.6%	72.2%
\$100,000.00/ year	1	5.6%	77.8%
\$2M	1	5.6%	83.3%
\$4M	1	5.6%	88.9%
\$8 M	1	5.6%	94.4%
\$25-30 M	1	5.6%	100.0%
<b>Total Valid responses</b>	<b>18</b>	<b>100.0%</b>	
Missing	4		
<b>Total</b>	<b>22</b>		

Notes: Four missing cases. Percent totals may not sum to 100% because of rounding error.

More than 50% of respondents (12) owned or leased heavy equipment or trucks in the past 12 months (Table 3.6-2), but only 14.3% (3) had ever dealt with trade unions (Table 3.6-3).

**Table 3.6-2. Ownership or Lease of Heavy Equipment or Trucks in the Past 12 Months (Q36)**

Owned or Leased Heavy Equipment or Trucks in Past 12 Months?	Frequency	Percent	Valid Percent
Yes	12	54.5%	54.5%
No	10	45.5%	45.5%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>100.0%</b>

Notes: Percent totals may not sum to 100% because of rounding error.

**Table 3.6-3. Company Dealings with Trade Unions (Q37)**

Company Has Dealt with Trade Unions?	Frequency	Percent	Valid Percent
Yes	3	13.6%	14.3%
No	18	81.8%	85.7%
<b>Total Valid Responses</b>	<b>21</b>	<b>95.5%</b>	<b>100.0%</b>
Missing	1	4.5%	
<b>Total</b>	<b>22</b>	<b>100.0%</b>	

Notes: One missing case. Percent totals may not sum to 100% because of rounding error.

About four in five (81.8% or 18) businesses normally get awarded contracts for work based on relationships. Repeat business from existing clients is also a major method of getting contracts, reported by 77.3% (17) of respondents (Table 3.6-4). Only six (27.3%) businesses reported providing proposals or technical specifications as usual basis for being awarded contracts. Ten (45.5%) respondents said that they also use other methods to get awarded contracts such as “word of mouth.”

**Table 3.6-4. Normal Company Basis for being Awarded Contracts for Work (Q38, Multiple Responses)**

Normal Basis for Contract Awards	Count	Percent of Responses	Percent of Cases
Based on relationships	18	35.3%	81.8%
Providing proposals or tech spec	6	11.8%	27.3%
Repeat business from existing clients	17	33.3%	77.3%
Other	10	19.6%	45.5%
<b>Total</b>	<b>51</b>	<b>100.0%</b>	<b>n/a</b>

Notes: Percent of cases is based on 22 valid cases. Percent or responses may not sum to 100% because of rounding error. Total percent of cases exceeds 100% due to multiple responses.

About 42.9% (9) of respondents reported having participated in a competitive bid for work, while 57.1% (12) reported that they have never participated in a competitive bid process (Table 3.6-5). Most respondents reported that the reasons that would stopped them for participating in a competitive bid are that they have never done that before (45% or 9) and concerns about competition (25% or 5). Furthermore, one-quarter of respondents (5) said that nothing would stop them from participating in competitive bids (Table 3.6-6).

**Table 3.6-5. Previous Participation in a Competitive Bid for Work (Q39)**

Previous Participation in Competitive Bid?	Frequency	Percent	Valid Percent
Yes	9	40.9%	42.9%
No	12	54.5%	57.1%
<b>Total Valid Responses</b>	<b>21</b>	<b>95.5%</b>	<b>100.0%</b>
Missing	1	4.5%	
<b>Total</b>	<b>22</b>	<b>100.0%</b>	

Notes: One missing case. Percent totals may not sum to 100% because of rounding error.

**Table 3.6-6. What Would Stop Business from Participating in a Competitive Bid (Q40, Multiple Response)**

Obstacles to Participation in Competitive Bid	Count	Percent of Responses	Percent of Cases
Time and ability to write a proposal	2	9.5%	10.0%
Concern about competition	5	23.8%	25.0%
Never done it before - prefer to do what I know	9	42.9%	45.0%
Nothing	5	23.8%	25.0%
<b>Total</b>	<b>21</b>	<b>100.0%</b>	<b>n/a</b>

Notes: Percent of cases is based on 21 valid cases (1 missing). Percent or responses may not sum to 100% because of rounding error. Total percent of cases exceeds 100% due to multiple responses.

Of the 22 respondents, 14 did not have a written health, safety and environment (HSE) program or manual, while 8 have (Table 3.6-7). Of them, 7 reported that their business conduct HSE inspections; only 1 reported not conducting inspections (Table 3.6-8).

**Table 3.6-7. Company has Written HSE Program or Manual (Q41)**

HSE Program/Manual?	Frequency	Percent	Valid Percent
Yes	8	36.4%	36.4%
No	14	63.6%	63.6%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>100.0%</b>

**Table 3.6-8. Business Conducts Project HSE Inspections (Q42)**

HSE Inspections?	Frequency	Percent	Valid Percent
Yes	7	31.8%	31.8%
No	15	68.2%	68.2%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>100.0%</b>

Most respondents reported that their business do not have a drug and alcohol program (95% or 21 respondents; Table 3.6-9). Only one business had such program in place.

**Table 3.6-9. Company Has a Drug and Alcohol Program (Q43)**

Drug and Alcohol Program?	Frequency	Percent	Valid Percent
Yes	1	4.5%	4.5%
No	21	95.5%	95.5%
<b>Total</b>	<b>22</b>	<b>100.0%</b>	<b>100.0%</b>

### 3.7 BUSINESS FINANCES

Survey participants were asked regarding business revenues over the last three years (Q44). About 70% (15) of respondents provided an answer to this question. Of these, two-thirds (15) reported revenues of \$50,000 or lower. The median annual revenue reported was \$26,000, with the highest being \$6.3 million and the lowest being \$1,500 for the year 2010.

Most respondents reported a slight increase in revenues in 2010 with respect to 2009 and 2008, except for three respondents who indicated a reduction in revenues in 2010 with respect to the previous two years.

## References

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Avanti. 2011. Appendix 3 in *KMP Project Work Plan for Assessment of Nisga'a Economic, Social, and Cultural Impacts*. Vancouver, BC: Avanti Mining Inc.

NLG. 2008. *Nisga'a Final Agreement*. <http://www.nisgaalisims.ca/?q=nisgaa-final-agreement>. (accessed April 2010).

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# Appendix A

## Nisga'a Business Survey



# **KSM AND KMP BUSINESS SURVEY**

**July 27, 2011**

## KSM and KMP Business Survey

### Dear Business Owner:

Thank you for taking the time to review this business survey information package.

The survey has been reviewed by the Nisga'a Lisims Government, and NLG encourages you to participate in the survey. The survey is being carried out under the direction of the BC Provincial Government and the Government of Canada to address the requirements of the Nisga'a Final Agreement (NFA) as it applies to two proposed mines: the Kitsault Mine Project and the Kerr Sulphurets Mitchell (KSM) Mine Project.

We are conducting a survey of Nisga'a businesses to better understand the potential economic effects of the two proposed mines. The survey will take approximately 30 minutes depending on your answers. You may recall receiving a letter regarding this research. As stated in that letter, your participation in this study is totally voluntary and your answers will be kept strictly confidential. If you do not wish to respond to a question, please move on to the next question.

The NLG will own and retain control of this information after the provincial and federal governments complete the Environmental Assessment (evaluation process) of the two mines. No copies of the original survey forms or data will be kept by the mine proponents or their consultants.

This survey is being carried out to examine the businesses owned, controlled or partnered with the Nisga'a Lisims Government and Nisga'a Citizens. When we say *Nisga'a businesses*, we mean businesses that are owned in whole or in part by Nisga'a individuals, groups, or the Nisga'a Lisims Government.

#### Q1) Are you aware of the KSM project?

- Yes
- No

The KSM (Seabridge) project is a proposed open pit gold and copper mine development that drains into the Unuk River. The access tunnels, process plant and the Tailing Management Facility partly lie within the northwest extremity of the Nass Area. If the project is approved, construction is anticipated to start in late 2013 and take up to five years to complete. The mine would operate for 50-55 years starting in late 2018 or early 2019. As indicated, the proposed mining area is located in the drainage basin of Sulphurets Creek, a tributary of the Unuk River. The KSM project mine area consists of four mining zones within Mitchell and Sulphurets valleys. The ore from the mine area would be transported via a tunnel to a process plant located in upper south Teigen Creek area, a tributary of Teigen Creek. The proposed Tailing Management Facility would be located in the upper south Teigen Creek tributary and upper north Treaty Creek tributary areas. Teigen and Treaty Creeks are tributaries of the Bell-Irving River, which is itself a major tributary of the Nass River. The concentrate extracted from the mine would be transported to the Port of Stewart by truck. The mine would have on site accommodation during construction for to 1,000 people and during operations up to 550 people. If approved, it is anticipated that all workers would be transported by bus to communities or airports in the region.

**Q2) Are you aware of the Kitsault project?**

- Yes
- No

Avanti Kitsault Mine Ltd. (Avanti) is a redevelopment and operation of a molybdenum mine that operated for a short period during the late 70s and early 80s at Kitsault near Alice Arm. The mine will be an open pit truck and shovel operation. The process plant with a throughput of 40,000 tonnes of ore per day will be located approximately 1 km north of the open pit. The tailing storage facility will be in the Patsy Lake drainage area. If the project is approved, the mine would employ a construction workforce of up to 700 workers over 25 months starting in 2012 and an operations workforce of approximately 300 people over the 16-year operating life of the mine starting in 2014. The mine would have on site accommodation for all construction and operations workers. Workers would be transported by bus to communities in the region and to the Terrace airport for transportation to other parts of BC.

**Business Overview**

1) **Company/business name:** \_\_\_\_\_

2) **Ownership: Please indicate the type of ownership structure of your business from the list below:**

- Sole Proprietorship
- Private Company (Incorporated)
- Nisga'a Village Corporation
- Nisga'a Lisims Government Corporation

3) **If your business is in a Joint Venture or a partnership, is it:**

- with another Nisga'a business?
- with a non-Nisga'a business?

4) **Ownership breakdown:**

\_\_\_\_\_ % Nisga'a Corporation ownership  
\_\_\_\_\_ % Nisga'a Village Corporation ownership  
\_\_\_\_\_ % Nisga'a citizen ownership

5) **Date founded / incorporated:**

\_\_\_\_\_

6) **Under present management since:**

---

7) **Please indicate which sector(s) your business occupies:**

- |  |  |
|--|--|
| <input type="checkbox"/> Agriculture                           | <input type="checkbox"/> Transportation and Warehousing                  |
| <input type="checkbox"/> Forestry                              | <input type="checkbox"/> Finance, Insurance, Real Estate and Leasing     |
| <input type="checkbox"/> Fishing                               | <input type="checkbox"/> Professional, Scientific and Technical Services |
| <input type="checkbox"/> Mining, Quarrying, Oil and Gas        | <input type="checkbox"/> Business, Building and Other Support Services   |
| <input type="checkbox"/> Utilities                             | <input type="checkbox"/> Educational Services                            |
| <input type="checkbox"/> Construction                          | <input type="checkbox"/> Health Care and Social Assistance               |
| <input type="checkbox"/> Manufacturing                         | <input type="checkbox"/> Information, Culture and Recreation             |
| <input type="checkbox"/> Services-Producing Sector             | <input type="checkbox"/> Tourism, Accommodation and Food Services        |
| <input type="checkbox"/> Retail and Wholesale Sales            | <input type="checkbox"/> Cultural Industries (Carving, prints, etc.)     |
| <input type="checkbox"/> Other Services (including Government) |  |

8) **What are the main services / goods your business provides?**

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9) **What are the main costs of running your business?**

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10) **What are the greatest risks your business faces?**

---

**Employees**

11) **Provide an estimated breakdown of your employees:**

Nisga’a Nation Citizens		Other Employees		Total
# Male	# Female	# Male	# Female	

12) **Number of employees...**

\_\_\_\_\_ In 2010

\_\_\_\_\_ In 2009

\_\_\_\_\_ In 2008

13) **Number of employees who were Nisga'a Nation citizens...**

\_\_\_\_\_ In 2010

\_\_\_\_\_ In 2009

\_\_\_\_\_ In 2008

**Clients and Customers**

14) **During the past 12 months, what percentage of your client or customer base was:**

\_\_\_\_\_ Individual consumers?

\_\_\_\_\_ Other companies?

\_\_\_\_\_ Nisga'a or municipal governments?

\_\_\_\_\_ Provincial or federal government?

\_\_\_\_\_ Social or educational agencies or institutions?

*TOTAL = 100%*

15) **During the past 12 months, how many clients or customers did you have?**

1

2 to 5

6 to 10

11 to 25

More than 25

16) **What industry or industries are your clients engaged in?**

- |   |  |
|---|--|
| <input type="checkbox"/> Agriculture                    | <input type="checkbox"/> Transportation and Warehousing                  |
| <input type="checkbox"/> Forestry                       | <input type="checkbox"/> Finance, Insurance, Real Estate and Leasing     |
| <input type="checkbox"/> Fishing                        | <input type="checkbox"/> Professional, Scientific and Technical Services |
| <input type="checkbox"/> Mining, Quarrying, Oil and Gas | <input type="checkbox"/> Business, Building and Other Support Services   |
| <input type="checkbox"/> Utilities                      | <input type="checkbox"/> Educational Services                            |
| <input type="checkbox"/> Construction                   | <input type="checkbox"/> Health Care and Social Assistance               |
| <input type="checkbox"/> Manufacturing                  | <input type="checkbox"/> Information, Culture and Recreation             |
| <input type="checkbox"/> Services-Producing Sector      | <input type="checkbox"/> Tourism, Accommodation and Food Services        |
| <input type="checkbox"/> Retail and Wholesale Sales     | <input type="checkbox"/> Other Services (including Government)           |

**Future Business Expectations in the Absence of the Mines Scenario**

17) **Over the next 10 years do you expect the size of your business to:**

- Remain about the same? Why? \_\_\_\_\_
- Grow? Why? \_\_\_\_\_
- Shrink? Why? \_\_\_\_\_

18) **By what percentage would your revenue have to increase before you would need to add workers?**

\_\_\_\_\_

19) **Is your business growth limited by any of the following: existing plant and equipment, capital (the ability to purchase or lease equipment), supplies, skilled labour (the ability to hire needed workers), demand for your product or services, or concerns about quality or reliability? If yes, please provide details.**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Future Business Expectations with the Mines Scenario**

20) **Has your business ever worked for, or with, a mining company?**

- Yes – Please describe: \_\_\_\_\_
- No

21) **Would you be interested in being a supplier of goods or services to the mines?**

- Yes
- No – Why not? \_\_\_\_\_

**Interest in the Mine Scenarios (if applicable)**

22) **Construction of Kitsault mine is expected to take about two years, while the KSM mine will take 4-5 years to build. Would you interested in supplying goods or services to a mining project during construction?**

- Yes
- No (go to question #24)
- Maybe

23) **Please indicate which of these business opportunities your company might be interested in. Please rate them from 1 to 7, with 1 being not at all interested and 7 being extremely interested.**

	Not At All Interested							Extremely Interested
	1	2	3	4	5	6	7	
Camp construction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Earthworks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Surveying	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental monitoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expansion to an existing camp	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Batch plant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General site services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clearing and logging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Catering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fuel supply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personnel transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24) **Operations at Kitsault are expected to occur over 16 years, while KSM may operate for as long as 55 years. Would you be interested in supplying goods or services to either mine during operations?**

- Yes
- No (go to question #26)
- Maybe

25) **Listed below are types of operations contracts and services at the mines. Please indicate which of these you might be interested in. Please rate them from 1 to 7, with 1 being not at all interested and 7 being extremely interested.**

	Not At All Interested						Extremely Interested
	1	2	3	4	5	6	7
Camp / catering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General site services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Revegetation, sample plots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Road maintenance /snow removal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personnel transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental monitoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fuel supply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concentrate transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26) **What opportunities do you see a mine in the region bringing to the local economy? Please rate them from 1 to 7, with 1 being not at all likely and 7 being extremely likely.**

	Not At All Likely						Extremely Likely
	1	2	3	4	5	6	7
Increased local demand for goods and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased demand for local workforce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved local infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experience serving bigger contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27) **Is your business able to take on additional work?**

- Yes
- No
- Maybe



28) **What challenges or opportunities could your company face? Please rate them from 1 to 7, with 1 being not at all likely and 7 being extremely likely.**

	Not At All Likely						Extremely Likely
	1	2	3	4	5	6	7
Challenges with existing plant and equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital/financing challenges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Challenges in hiring skilled labour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased demand for your products/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concerns about product or reliability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

29) **In order to take advantage of potential business opportunities, would you be interested in a joint venture or partnership?**

- Yes
- No

30) **If yes, would you be interested in a joint venture or partnership with a non- Nisga'a business?**

- Yes
- No

31) **What challenges do you see a mine bringing to your business? Choose any that apply. Please rate them from 1 to 7, with 1 being not at all likely and 7 being extremely likely.**

	Not At All Likely						Extremely Likely
	1	2	3	4	5	6	7
Shortage of qualified workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inflation in local prices or wages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shortage of supplies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competitive bidding for work at mines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited business opportunities if mines are union sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracting packages beyond the capacity of my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mines may directly hire some of my employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

32) **What measures would assist you in securing work at the mines? Choose any that apply. Please rate them from 1 to 7, with 1 being not at all likely and 7 being extremely likely.**

	Not At All Likely						Extremely Likely
	1	2	3	4	5	6	7
Smaller size of contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shorter duration of contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct negotiations as opposed to competitive bid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financing assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Early payment arrangements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Joint venture with mine developer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Joint venture with other firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Pre-qualification**

33) **Current amount of comprehensive general liability insurance coverage:**

\$ \_\_\_\_\_

34) **Current amount of automobile liability insurance coverage:**

\$ \_\_\_\_\_

35) **What size of contract would you be interested in and able to perform at your current size, without investing in any additional assets or hiring any additional staff?**

\$ \_\_\_\_\_

36) **Provide description / data / capacities on heavy equipment and trucks (larger than pick-up trucks) that your company has owned or leased in the past 12 months:**

Equipment Type	Number	Age	Capacity	Location

37) **Has your company had any dealings with trade unions?**

Yes – Please list: \_\_\_\_\_

No

38) **How does your company normally get awarded contracts for work?**

- Based on relationships
- Providing proposals or technical specifications
- Repeat business from existing clients
- Other: \_\_\_\_\_

39) **Have you ever participated in a competitive bid for work?**

- Yes – Please list: \_\_\_\_\_
- No

40) **What would stop you from participating in a competitive bid?**

- Time and ability to write a proposal
- Concern about competition
- Never done it before – prefer to do what I know
- Other: \_\_\_\_\_

41) **Do you have a written Health Safety and Environment (HSE) program or manual?**

- Yes
- No

42) **Do you conduct project HSE inspections?**

- Yes – How often? \_\_\_\_\_
- No

43) **Does your company have a drug and alcohol program?**

- Yes
- No

### Financial Information

44) **Revenues for the past three years:**

\$ \_\_\_\_\_ 2010  
\$ \_\_\_\_\_ 2009  
\$ \_\_\_\_\_ 2008

Thank you for taking the time to complete this survey. Comments regarding the survey can be forwarded to the NLG office. To read the final report, please contact the NLG office.

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