

Bruce Power Supplier Forum

Safely Secure our Future

September 21, 2018



Welcome – Today's Agenda

Agenda Item	Responsible	Time
Registration and Coffee / Networking	All	8:00 - 9:00
Welcome and Safety Moment	Richard Horrobin, VP & MD, Supply Chain	9:00 - 9:10
Introduction / Kick off	Richard Horrobin, VP & MD, Supply Chain	9:10 - 9:20
Brue Power State of the Nation <ul style="list-style-type: none"> • Opening comments • Operational update • Projects overview • 2019-2021 Business Plan 	Mike Rencheck, President & CEO Len Clewett, EVP & CNO Kelly Trice, EVP, Projects & Field Services John Soini, EVP, Finance & Commercial Services	9:20 - 10:10
Procurement Outlook	Richard Horrobin, VP, Supply Chain	10:10 - 10:30
Achieving Performance Excellence <ul style="list-style-type: none"> • Supplier Relations and Scorecards • Addressing your Feedback 	John Soini, EVP, Finance & Commercial Services	10:30 - 10:50
Localisation and Our New Indigenous Procurement Policy	Richard Horrobin, VP & MD, Supply Chain	10:50 - 11:10
Supplier Code of Conduct	John Kain, DM, Code of Conduct	11:10 - 11:25
Industry Update	John Peevers, DM, Communications	11:25 - 11:40
Morning Wrap-Up – Instructions for the Afternoon	Richard Horrobin, VP & MD, Supply Chain	11:40 - 11:45
Lunch and Networking	All	11:45 - 12:45
Golf – 9 holes; Shotgun start	All	1:00 - 3:30
Wrap-up and Closing Comments	Mike Rencheck, President & CEO	3:45 - 4:15

Safety Information

- Safety Moment
- Logistics
 - Medical, Fire or Police emergency – call 911
 - First Aid Responders
 - Fire alarms – nearest exit, assemble in parking lot
 - Washrooms



Project Performance: Safety, Quality, Cost and Schedule

Mike Rencheck, President and CEO

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Project Performance

1. Project Leadership - No substitute

- **The leadership of a project matters – mindset, attitude, and organizational culture across the team and its contractors**
 - PMI processes and standards are needed but too often a crutch for good leadership, engagement and decision making.
- **Creating the Team**
 - Purpose, identity, and culture.
 - Aligning incentives through consistent performance and metrics.
 - “Ownership mind-set among all team members, ensure timely decision-making, and proactively manage performance using leading indicators.”

Project Performance

2. Safety and Productivity are the same go hand-in-hand

- Build a culture of excellence – safety, quality, schedule and cost are all required to perform to standards.
- Shaping and enforcing behavior and mind-sets on project teams
- Training and role modelling to instill values
- Re-enforcement of standards –
 - Site signage
 - Productivity-promotion - productivity hotline, suggestion cards, celebrations of success stories, and a rewards program.

Project Performance

3. Ownership – a partnership between owner and suppliers

- **We are in this together** – a 25 year Life Extension program with a 15 year MCR project critical path.
- **Relationships** – performance is the key and all topics are on the table.
- **Strategic partners** – pooling and long term contracts, innovation pilots or continuous improvement programs

Project Performance

4. Integrated Project Team

- **One Team** - A unified project organization.
 - Collaborative and Supplier, owner, contractor act as one
- **Schedules** -
 - **Alignment - Key tasks**
 - **Issues – team** communicates and solves quickly
 - **Project Leaders** – “establish the culture, direction, and systems that enable the team to work effectively—not as masterminds who delegate tasks and instructions top down.”

Project Performance

5. Continuous Improvement

- **Metrics: Project Improvement (PI)**
- **Partners**
 - Improve project value through innovations, ideas, optimizations in techniques or schedule execution, productivity, or scope control.
 - Reviewed continuously— by the IPT —throughout the project.
- **Outcome** - significantly increase the predictably and reduce risk for a successful delivery.

Project Performance

6. Project Control Center

- **Integrate all aspects of project performance** – safety, quality, schedule and cost
- **Ownership** - being responsible and accountable for performance and results.
- **War Room Mentality**- “strict meeting structure to establish a daily *project cadence* and facilitate rapid issue detection and resolution.”
- **Collaborative project culture**
 - “ensuring transparent and early reporting of issues.”
 - “finding solutions rather than assigning blame”
- **COMMON TOOL SET** - P6 and/or Ecosys

Operational Update

Len Clewett, EVP and CNO

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Safety

- Safety Pillars
- Safety Culture
- *You can count on me.*
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Quality

- Preparation
- Execution
- Learning

Cost and Schedule

- 291 Outage Days in 2019
- New Equipment Performance Division
- Excellence - Safety and cost are strongly correlated

Projects Update

Kelly Trice, EVP Projects & Field Services

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Understanding Our Business Model and 2019-2021 Business Outlook

John Soini, EVP Finance & Commercial Services

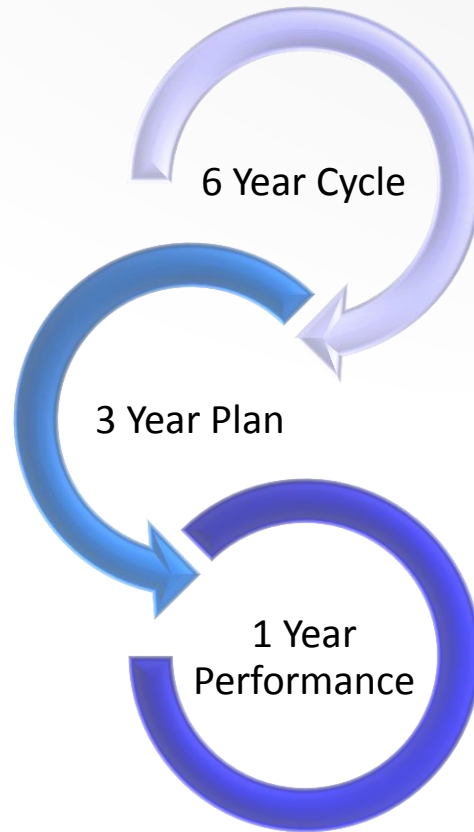
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Our Business Model



Procurement Calendar Outlook

Richard Horrobin,
VP and Managing Director, Supply Chain

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Procurement Calendar Outlook

Significant Procurements accepting Proposals

- Engineering MATOC
- BP – OPG Transformers Collaborative Procurement
- Heat Exchanger Field Services
- Laundry Services

Significant Upcoming Procurements

- Extended West Shift Plus Execution
- Protective Relays (Detailed Design, Equipment)
- Valve Services
- Training Services
- Fire Protection Bruce A & B

Procurement Calendar Outlook (www.brucepower.com)



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Procurement Calendar Outlook

Bruce Power will be pursuing multiple Requests for Information (RFI), Request for Proposals (RFP) and Requests for Quotation (RFQ) over the coming years.

Strong strategic partnerships with new and existing suppliers will be critical to our success towards our goals of safe, reliable generation, delivery of projects and our Major Component Replacement and Asset Management Programs.

The Procurement Calendar Outlook link included below is intended to provide the vendor community with more insight into the upcoming and ongoing efforts at Bruce Power. This information is updated monthly and will be refreshed as new information becomes available with a routine update the first week of each month.

Please note: Some RFPs will only be awarded to vendors who responded to the associated RFI.

See our current [Procurement Calendar outlook](#) (updated Sept. 11, 2018)

Bruce Power's listing of procurements on MERX.com can be found [here](#).

For specific inquiries, please see [our contact list](#).

Any MCR Inquiries be submitted to MCR.Procurement@brucepower.com

Thank you.

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SUPPLIERS

[Procurement Calendar Outlook](#)

[Guiding Procurement Principles](#)

[Indigenous Procurement Policy](#)

[Contracting Standards](#)

[Accounts Payable](#)

[New Supplier Prequalification and Performance Portal](#)

[Economic Development and Innovation Initiative](#)

[People and Community](#)

[Communication, Events and Contact](#)

Supplier Relations and Scorecards Addressing Your Feedback

John Soini, EVP Finance & Commercial Services

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Behavioural Attributes of Great Relationships



- **Building**: “Transparency is key, and taking accountability...Removing the us vs. them mentality is helping”.
- **Breaking**: “Playing the blame game. Unwillingness to truly understand the process and implement solutions”.

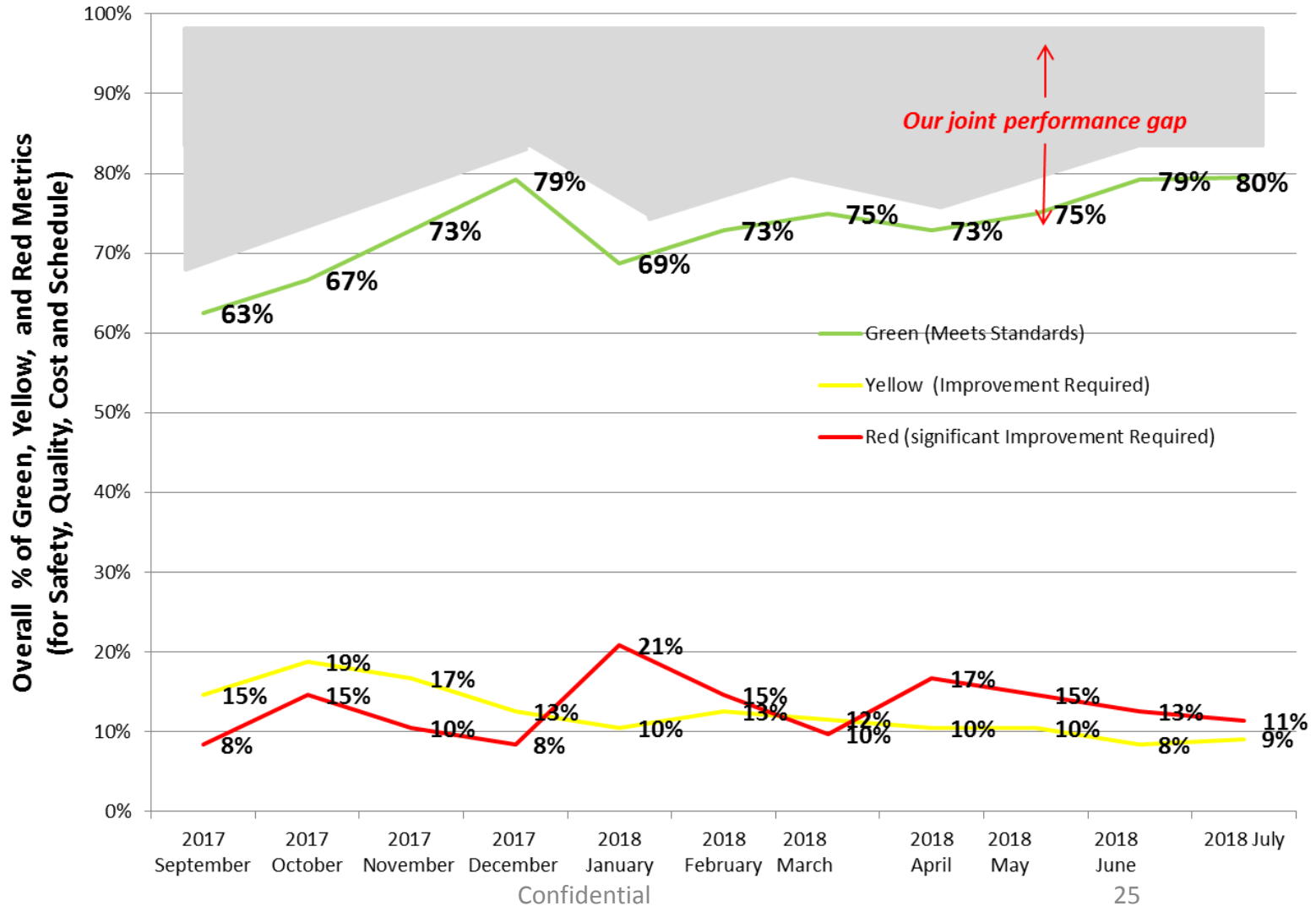
*Drawn from feedback from 90 supplier representatives.

Program Results – Examples of Observed Performance Trends

2017 - 2018 Supplier Performance Summary											
Supplier Name	Area	September	October	November	December	January	February	March	April	May	June
Supplier 1	Safety	100%(11/11)	100%(11/11)	100%(11/11)	90%(9/10)	100%(7/7)	100%(11/11)	100%(10/10)	100%(11/11)	92%(11/12)	100%(12/12)
	Quality	91%(10/11)	91%(10/11)	100%(11/11)	100%(10/10)	100%(7/7)	91%(10/11)	90%(9/10)	82%(9/11)	100%(12/12)	100%(12/12)
	Cost	90%(10/11)	82%(9/11)	90%(10/11)	100%(10/10)	100%(7/7)	100%(11/11)	100%(10/10)	100%(11/11)	100%(12/12)	100%(12/12)
	Schedule	82%(9/11)	91%(10/11)	81%(9/11)	80%(8/10)	86%(6/7)	91%(10/11)	90%(9/10)	91%(10/11)	83%(10/12)	92%(11/12)
Supplier 2	Safety	100%(5/5)	100%(5/5)	100%(5/5)	100%(5/5)	100%(3/3)	100%(3/3)	100%(3/3)	100%(3/3)	100%(2/2)	100%(2/2)
	Quality	100%(5/5)	100%(5/5)	100%(5/5)	100%(5/5)	100%(3/3)	100%(3/3)	100%(3/3)	100%(3/3)	100%(2/2)	100%(2/2)
	Cost	100%(5/5)	100%(5/5)	100%(5/5)	100%(5/5)	100%(3/3)	100%(3/3)	100%(3/3)	100%(3/3)	100%(2/2)	100%(2/2)
	Schedule	100%(5/5)	100%(5/5)	100%(5/5)	100%(5/5)	100%(3/3)	100%(3/3)	100%(3/3)	100%(3/3)	100%(2/2)	100%(2/2)
Supplier 3	Safety	100%(13/13)	100%(13/13)	100%(13/13)	100%(13/13)	100%(13/13)	100%(13/13)	100%(13/13)	100%(14/14)	100%(14/14)	100%(14/14)
	Quality	100%(13/13)	100%(13/13)	100%(13/13)	100%(13/13)	100%(13/13)	100%(13/13)	100%(13/13)	100%(14/14)	100%(14/14)	100%(14/14)
	Cost	85%(11/13)	85%(11/13)	92%(12/13)	92%(12/13)	100%(13/13)	92%(12/13)	100%(13/13)	100%(14/14)	100%(14/14)	100%(14/14)
	Schedule	62%(8/13)	77%(10/13)	84%(11/13)	85%(11/13)	77%(10/13)	85%(11/13)	85%(11/13)	100%(14/14)	100%(14/14)	100%(14/14)
Supplier 4	Safety	100%(24/24)	100%(24/24)	100%(20/20)	100%(19/19)	100%(19/19)	100%(20/20)	100%(20/20)	100%(19/19)	100%(20/20)	100%(19/19)
	Quality	83%(20/24)	100%(24/24)	100%(20/20)	100%(19/19)	89%(17/19)	85%(17/20)	100%(20/20)	100%(19/19)	95%(19/20)	84%(16/19)
	Cost	96%(23/24)	88%(21/24)	95%(19/20)	95%(18/19)	84%(16/19)	80%(16/20)	75%(15/20)	63%(12/19)	65%(13/20)	95%(18/19)
	Schedule	88%(21/24)	88%(21/24)	85%(17/20)	79%(15/19)	63%(12/19)	65%(13/20)	80%(16/20)	74%(14/19)	70%(14/20)	84%(16/19)

Improving Net Performance (but not 100%!) K

Performance Metric Trends For 13 Key Suppliers
 (covering ~89 contracts >\$750k)



Supplier Survey Update - Background

- Focus Areas – Supplier perspectives on:
 - RFX processes
 - Contract / PO Execution
 - Communication and Support
 - Supplier Opportunity
 - Overall relationship and behaviours
- Survey issued to 25 suppliers (March 1-28, 2018)
- 82% confirmed response
- Total of 544 comments submitted against focus areas.
- Action plans set for top 5 themes.

Supplier Survey – Next Steps

Feedback	Action Plan
<p>Change order process is slow</p>	<ul style="list-style-type: none"> • Simplify the process and eliminate duplication/redundant information • Stakeholder and pilot with 2 supplier partners • Implement solution in Maximo
<p>Scope of work is not always clear</p>	<ul style="list-style-type: none"> • Construction Managed Task scope improvement team has been formed • Simplify and clarify Construction Managed Task scope process • Simplify and clarify main RFP templates
<p>Gap in organizational alignment</p>	<ul style="list-style-type: none"> • Continued emphasis on JMCs and SRMs • Ongoing presentations to supplier partners and project organizations
<p>Not receptive to innovation suggestions</p>	<ul style="list-style-type: none"> • Launched SupplierSuggestions@BrucePower.com • Project scope definition pilot with supplier partner
<p>Not enough time to bid</p>	<ul style="list-style-type: none"> • Continuing to pursue long-term and large awards through Category Management / Strategic Sourcing • Improve up-front project scheduling for commercial processes

Follow-up survey in Spring 2019

Localization and Bruce Power's Indigenous Procurement Policy

Richard Horrobin,
VP and Managing Director, Supply Chain

Our Local Supply Chain – 2016 (10)



Our Local Supply Chain – Today (36)



GE Power



Clean Energy for a Low Carbon Economy



NA ENGINEERING ASSOCIATES INC



Sierra Systems



SNC-LAVALIN



Our Local Supply Chain – 2020?



Bruce Power Indigenous Procurement Policy

BRUCE POWER'S


Indigenous Procurement Policy

The site is located on the eastern shore of Lake Huron near Tiverton, Ontario within the traditional territory of the Saugeen Ojibway Nation (SON) and the traditional harvesting territories of the Métis Nation of Ontario (Region 7) (MNO) and the Historic Saugeen Métis (HSM). The site includes 8 operating CANDU reactors as well as ancillary facilities. Nuclear power has been safely generated from the site for the past 50 years, initially through the Douglas Point Nuclear Generating Station (1968-1982) and subsequently through the Bruce A and B Nuclear Generating Stations which were put into service from 1977 to 1979 and from 1984 to 1987 respectively.

Bruce Power is proud to be recognized as a Procurement Champion and awarded the PAR Gold certification through the Canadian Council for Aboriginal Business. We are committed to working with local Indigenous communities to define objectives and targets that will increase participation in contracting and procurement opportunities and developing concrete mechanisms in support of those objectives. This commitment will be achieved by the new Indigenous Procurement Policy to ensure a meaningful, measurable impact on contracting and procurement opportunities for local Indigenous companies as well as greater opportunities for regional and national Indigenous companies. Therefore we will:

- Utilize existing processes to solicit input from the local Indigenous communities, namely SON, MNO and HSM to collaboratively maximize the benefits of this policy.
- Implement an Indigenous modifier for the evaluation of proposals and support the inclusion of Indigenous businesses in awarding contracts. Ultimately the modifier will favour indigenous owned business in priority order of local, regional or national and where value added is performed by local Indigenous community members.
- Conduct annual pre-sourcing exercises to identify areas where Indigenous owned businesses can be involved in our Supply Chain.
- Enhance processes that identify Indigenous owned businesses within our approved supplier list to ensure inclusion in the Request for Proposals of new business opportunities.
- Conduct annual workshops to identify local Indigenous owned businesses and understand their current capacity and capability to meet our contracting and procurement requirements. Collaboratively work to develop their current capacity and capability and how to create potential opportunities with other Indigenous and non-Indigenous businesses.
- Conduct annual workshops for all local Indigenous businesses to enhance or share their services within the site.
- Leverage the Indigenous Relations Supplier Network (IRSN) to build relationships with the local Indigenous communities and businesses to identify opportunities and establish mentoring networks.

May 22, 2018
Date


Michael W. Ranshede
President and Chief Executive Officer



**BRUCE POWER
INDIGENOUS RELATIONS
SUPPLIER NETWORK**

Supplier Code of Conduct

John Kain, Code of Conduct and Privacy Officer

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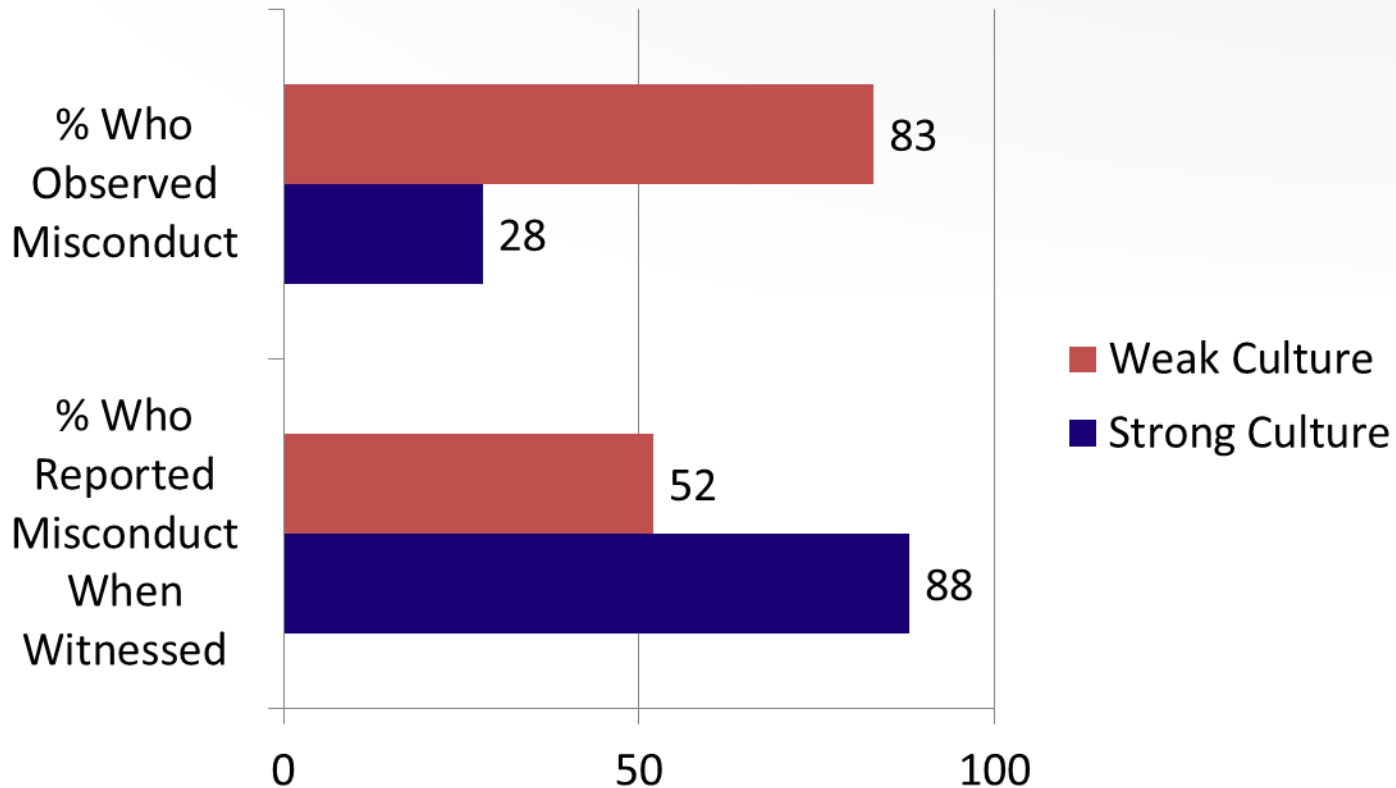
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***Trust takes years to build,
seconds to break,
and forever to repair.***

Ethical Culture

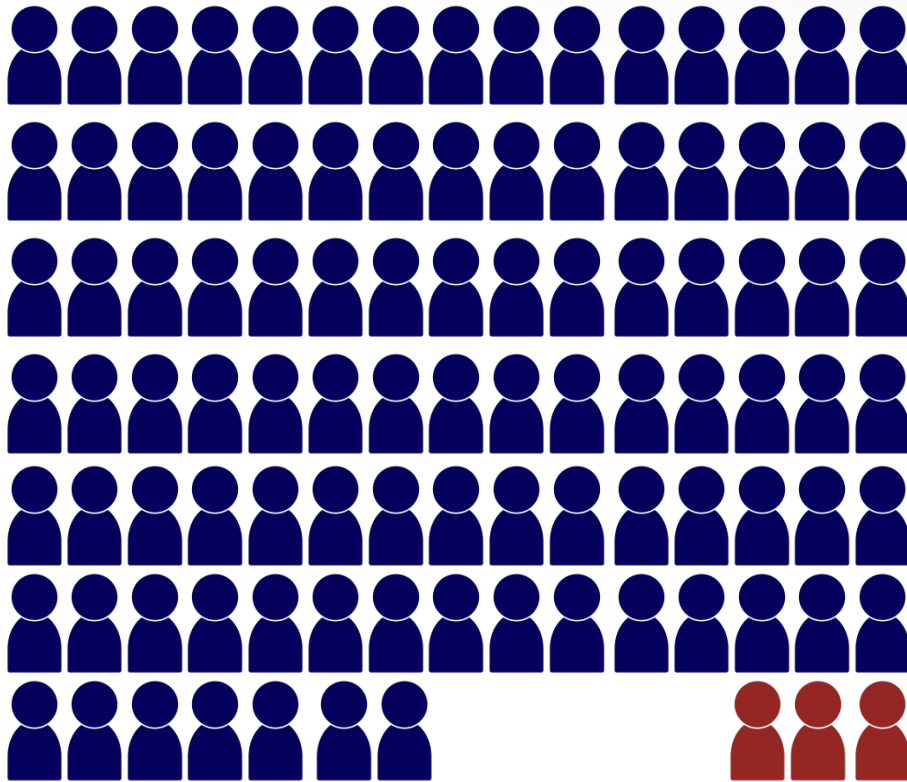
- What is an “Ethical Culture”?
 - An organizational culture where ethical values (integrity, respect, honesty, transparency, etc.) matter, as reflected in the actions of employees, company policy and procedures.
- The strength of a company’s ethical culture is the extent to which the organization makes ***doing the right thing*** a priority.

Strong Culture = Less Misconduct & Better Reporting



**2018 Ethics and Compliance Initiative
(Ethics.org)*

Strong Culture = Better Recruits



97% of MBAs surveyed* were willing to forgo financial benefits to work for a company with a better reputation for ethics and corporate social responsibility.

(Up to 14% of expected income)

**Source: CEB (now Gartner Inc.)*

Strong Culture = Better Performance

- Employees working for companies with strong ethical cultures are:
 - **2.1 times** more likely to over-perform on annual individual goals; and
 - **2.7 times** more likely to over-perform on annual team goals, when compared against employees working for companies with weak ethical cultures.

**Source: CEB (now Gartner Inc.)*

Other Positive Effects

- Companies who have strong ethical cultures tend to have:
 - more engaged employees who work harder (based on increased discretionary effort)
 - less turnover;
 - better safety performance;
 - higher productivity; and
 - better shareholder returns (based on publicly traded companies).

**Source: CEB (now Gartner Inc.)*

So how do you achieve and maintain a strong ethical culture?

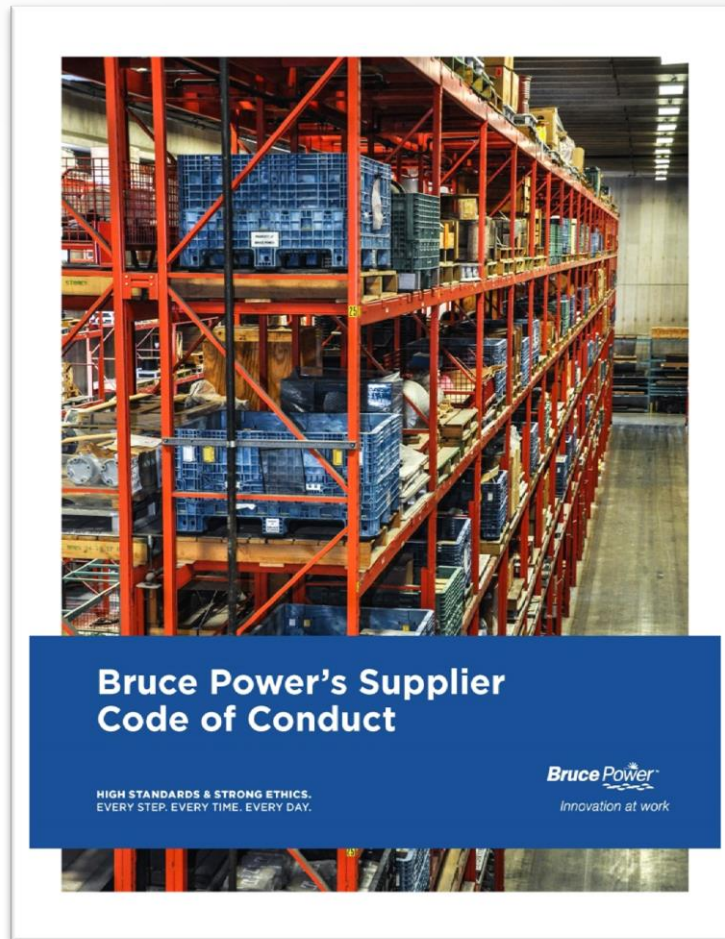
1) “Tone from the Top” Matters

- Actions – and perceptions – of top managers drive the ethical culture of the company and have a significant impact on outcomes.
- If top management culture is strong:
 - less misconduct is observed,
 - reporting of misconduct is increased,
 - employees report feeling less pressure to commit misconduct, and
 - retaliation for reporting misconduct is also reduced.

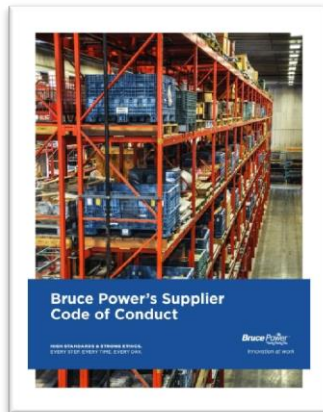
2) Set Clear Expectations

- It is important that ethical expectations, and consequences of misconduct, are clearly communicated to employees.
- Everyone has a role in helping to set those expectations: both senior leaders and direct manager leadership.
- That is part of my role here today...

Supplier Code of Conduct



Supplier Code of Conduct



- Harassment, Discrimination and Workplace Violence
- Human Rights and Diversity
- Privacy and Confidential Information
- Conflicts of Interest
- Gifts and Hospitality
- Anti-Corruption
- Insider Trading
- Business Reporting
- Protecting Bruce Power Assets
- Information Security
- Social Media

Back to First Principles

1. Conduct your business with integrity.
2. Treat the people with whom you do business with respect.
3. Do not engage in behaviour that is going to jeopardize the trust that Bruce Power has placed in you as a business partner.

Post Election – Post Re-Licensing Outlook

John Peevers, Director, Corporate Communications

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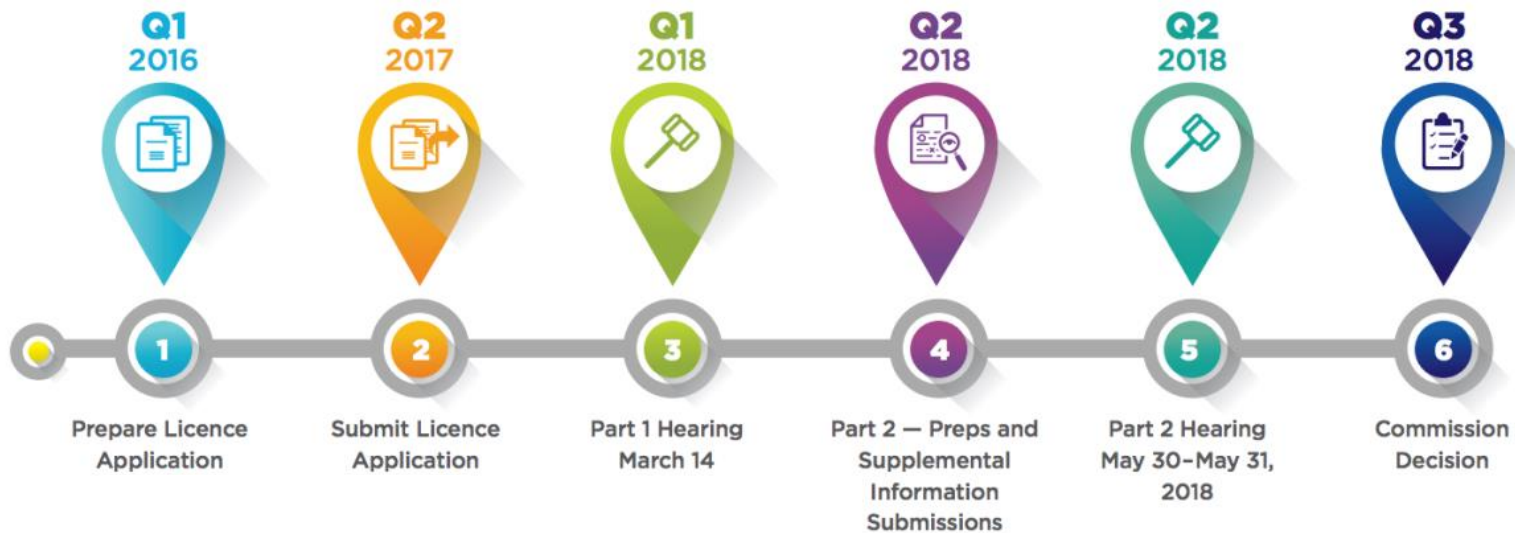
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Licence renewal

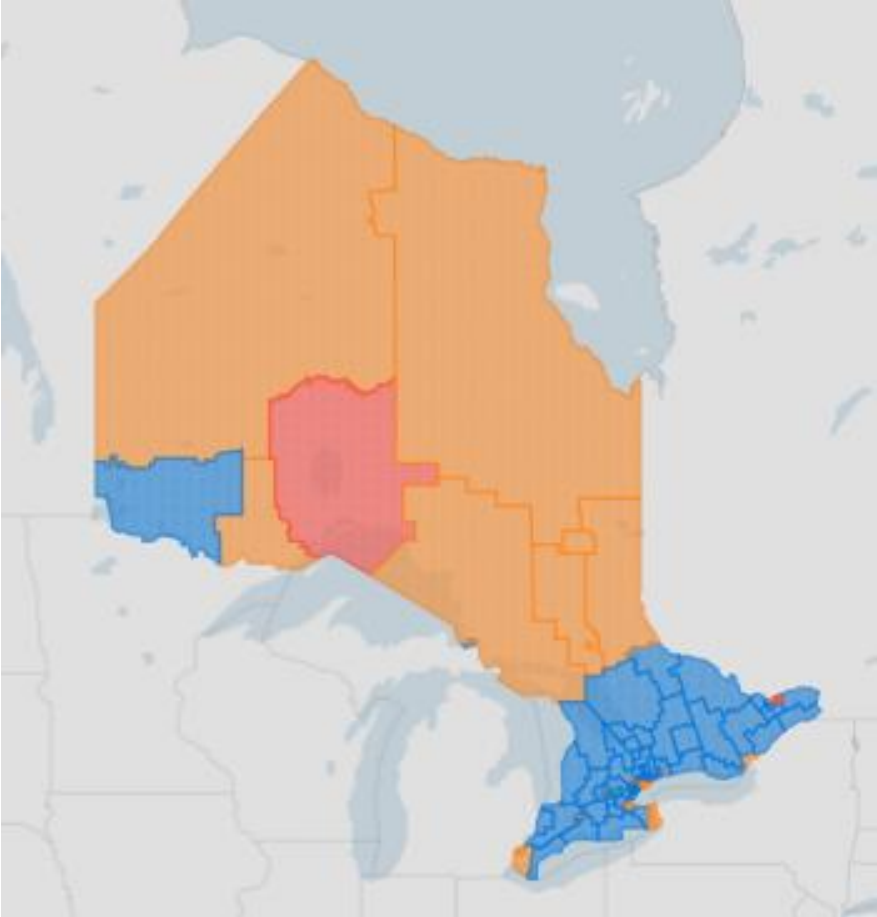
- 119 positive interventions including 48 positive oral presentations



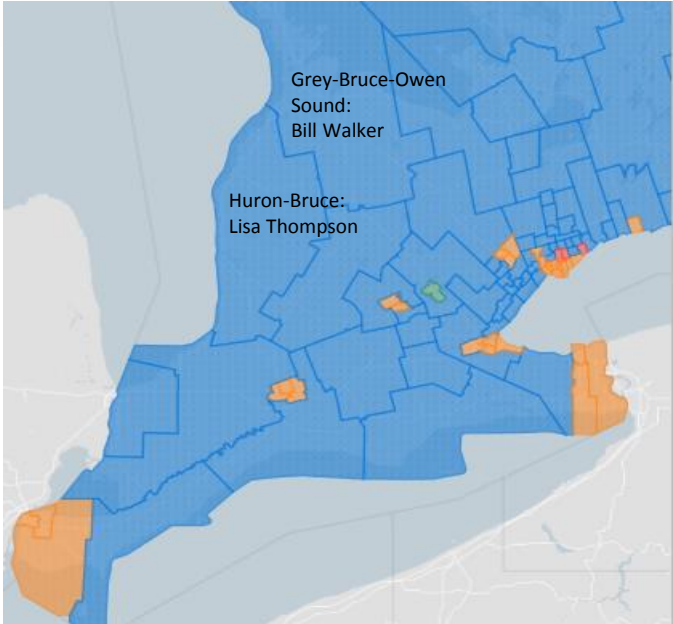
Licence Renewal Timeline



Election Results



- **PC**- 76 seats; 40.64% of the popular vote
- **NDP**- 40 seats; 33.69% of the popular vote
- **Liberal**-7 seats; 19.3% of the popular vote
- **Green**- 1 seat; 4.62% of the popular vote



For the people

- This election was not about who had the best vision for the province or which leader was the most premier-like. This election was **not about the macro**; it was **all about the micro**.
- Voters wanted **immediate relief**, not big promises for the future. They wanted policy that would positively impact them now:
 - 10-cents/litre reduction in cost of gas
 - Relief from electricity rates
 - A solution to the ever-increasing tax burden



What it means

- Government will be focused on **helping people** who are struggling.
- Government will be extremely sensitive about undertaking any projects that **harm the pocketbook** or affect voters' perceptions the PCs are there for the “little guy.”
- Back to basics: providing **tax relief** for Ontarians, focusing on **reducing the debt**, and sticking to its knitting.



PC Policy Commitments - Energy

- **Terminate** the board of **Hydro One** and its **CEO**
- **Repeal** the **Green Energy Act**
- Reduce **electricity rates** by 12% for families, farmers, and small businesses (**Cancel energy contracts** in the pre-construction phase and re-negotiate other energy contracts).
- Declare a **moratorium** on **new energy** contracts.
- Eliminate **enormous salaries** at Ontario Power Generation and Hydro One.



Ontario's New Cabinet



Hon. Greg Rickford - Minister of Energy, Northern Development and Mines, and Minister of Indigenous Relations.

Hon. Rod Phillips - Minister of the Environment, Conservation and Parks.

Hon. Vic Fedeli - Minister of Finance & Chair of Cabinet.

Hon. Peter Bethlenfalvy (MPP Pickering-Uxbridge) - President of the Treasury Board.

Hon. Lisa Thompson (MPP Huron-Bruce) - Minister of Education.

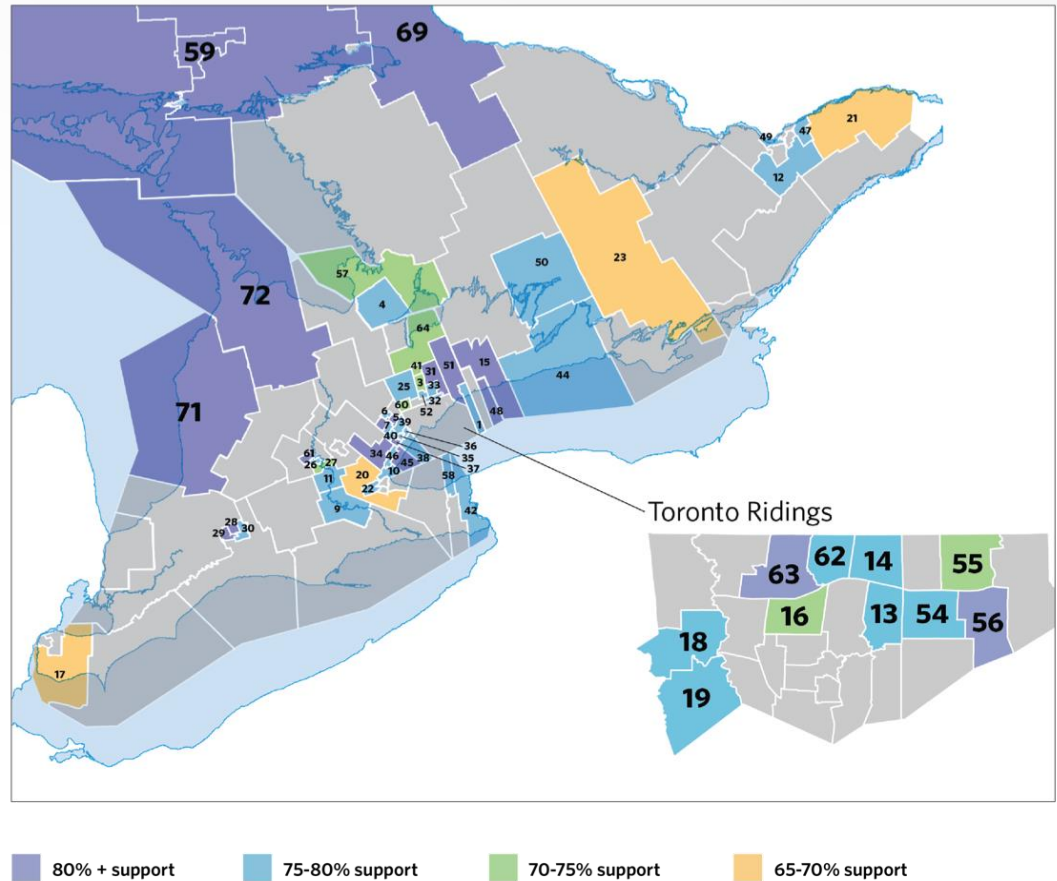
Hon. John Yakabuski (MPP Renfrew-Nipissing-Pembroke) becomes Minister of Transportation.

Hon. Jim Wilson (Simcoe—Grey) Minister of Economic Development, Job Creation and Trade

Nuclear Refurbishment support

Of 72 Ontario ridings (2018) polled this year, all had support levels greater than 65%.

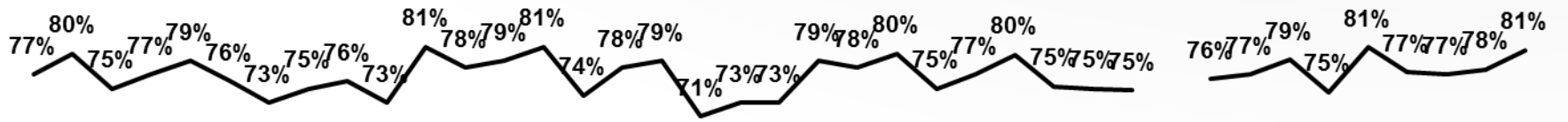
- | | | | |
|----|---------------------------------|----|-----------------------------------|
| 1 | Ajax | 38 | Mississauga-Lakeshore |
| 2 | Algoma-Manitoulin-Kapuskasing | 39 | Mississauga-Malton |
| 3 | Aurora-Oak Ridges-Richmond Hill | 40 | Mississauga-Streetsville |
| 4 | Barrie-Innisfil | 41 | Newmarket-Aurora |
| 5 | Brampton Centre | 42 | Niagara Falls |
| 6 | Brampton North | 43 | Nickel Belt |
| 7 | Brampton South | 44 | Northumberland-Peterborough South |
| 8 | Brampton West | 45 | Oakville |
| 9 | Brantford-Brant | 46 | Oakville North-Burlington |
| 10 | Burlington | 47 | Orleans |
| 11 | Cambridge | 48 | Oshawa |
| 12 | Carleton | 49 | Ottawa West-Nepean |
| 13 | Don Valley East | 50 | Peterborough-Kawartha |
| 14 | Don Valley North | 51 | Pickering-Uxbridge |
| 15 | Durham | 52 | Richmond Hill |
| 16 | Eglinton-Lawrence | 53 | Sault Ste Marie |
| 17 | Essex | 54 | Scarborough Centre |
| 18 | Etobicoke Centre | 55 | Scarborough North |
| 19 | Etobicoke-Lakeshore | 56 | Scarborough-Guildwood |
| 20 | Flamborough-Glanbrook | 57 | Simcoe North |
| 21 | Glengarry-Prescott-Russell | 58 | St. Catharines |
| 22 | Hamilton West-Ancaster-Dundas | 59 | Sudbury |
| 23 | Hastings-Lennox and Addington | 60 | Vaughan-Woodbridge |
| 24 | Kenora-Rainy River | 61 | Waterloo |
| 25 | King-Vaughan | 62 | Willowdale |
| 26 | Kitchener Centre | 63 | York Centre |
| 27 | Kitchener South-Hespeler | 64 | York-Simcoe |
| 28 | London North Centre | 65 | Algoma-Manitoulin |
| 29 | London West | 66 | Kenora Rainy River |
| 30 | London-Fanshawe | 67 | Thunder Bay-Atikokan |
| 31 | Markham-Stouffville | 68 | Thunder Bay-Superior North |
| 32 | Markham-Thornhill | 69 | Timiskaming-Cochrane |
| 33 | Markham-Unionville | 70 | Timmins-James Bay |
| 34 | Milton | 71 | Huron-Bruce |
| 35 | Mississauga Centre | 72 | Bruce-Grey-Owen Sound |
| 36 | Mississauga East-Cooksville | | |
| 37 | Mississauga-Erin Mills | | |



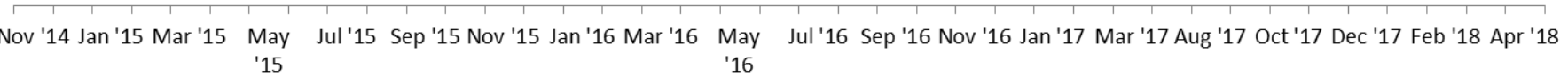
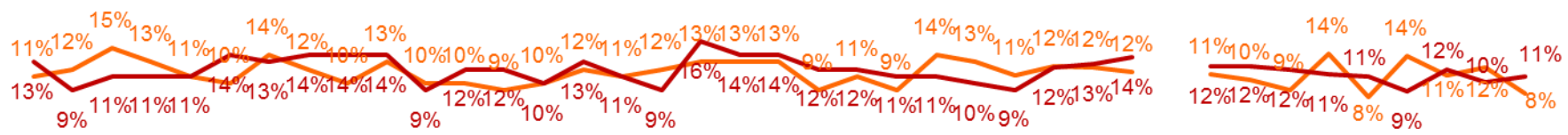
Decided Support for Refurb: Overall support up three points to 81%; 'strongly support' up 3 points month-to-month



Many large power-generating plants in Ontario with various fuel sources will have to be replaced over the next 10 years or so because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Ontario future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose upgrading and refurbishing existing nuclear power plants?



Bruce Power has also achieved 85% support for refurbishment in individual polls done in December, 2015; March 2017 and May, 2018



— TOTAL SUPPORT — Strongly support — Somewhat support — Somewhat oppose — Strongly oppose



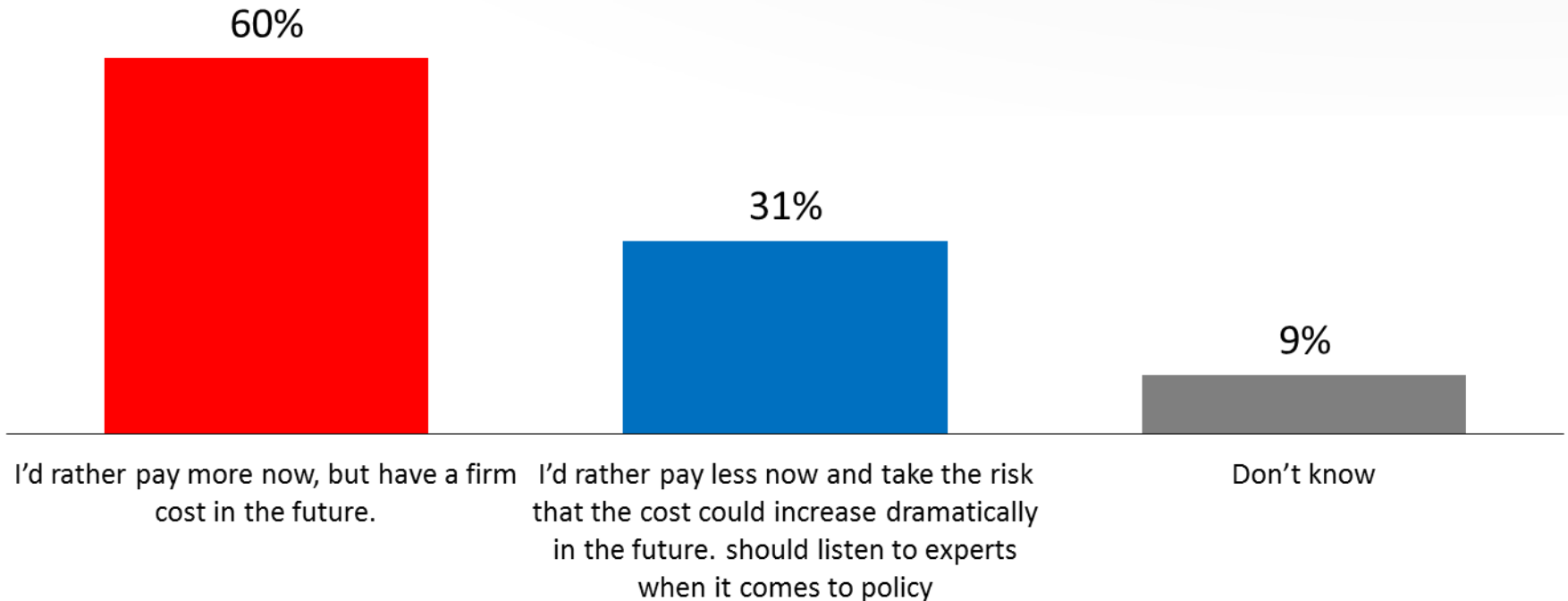
Note: Data collection was suspended between Apr '17 – Jul '17. The results have been re-calculated to exclude "don't know".
 "Don't know": Apr '18 (8%); Mar '18 (15%); Feb '18 (13%); Jan '18 (11%); Dec '17 (13%); Nov '17 (9%); Oct '17 (12%); Sep '17 (10%); Aug '17 (9%); Mar '17 (10%); Feb '17 (12%); Jan '17 (11%); Dec '16 (10%); Nov '16 (10%); Oct '16 (12%); Sep '16 (9%); Aug '16 (10%); Jul '16 (11%); Jun '16 (15%); May '16 (12%); Apr '16 (13%); Mar '16 (11%); Feb '16 (19%); Jan '16 (15%); Dec '15 (11%); Nov '15 (12%); Oct '15 (15%); Sep '15 (11%); Aug '15 (15%); July '15 (19%); July '15 (14%); May '15 (12%); Apr '15 (13%); Mar '15 (5%); Feb '15 (12%); Jan '15 (11%); Dec '14 (7%); Nov '14 (8%)

Pay Now or Later: A majority (60%) would prefer to pay more now for a firm cost in the future

Q

When thinking about keeping up with Ontario's increasing demand for electricity, there are different options to consider, and there are cost implications depending on the cost of generation and fuel costs. Generally speaking, which of the following statements is closest to your view?

[asked of all respondents]

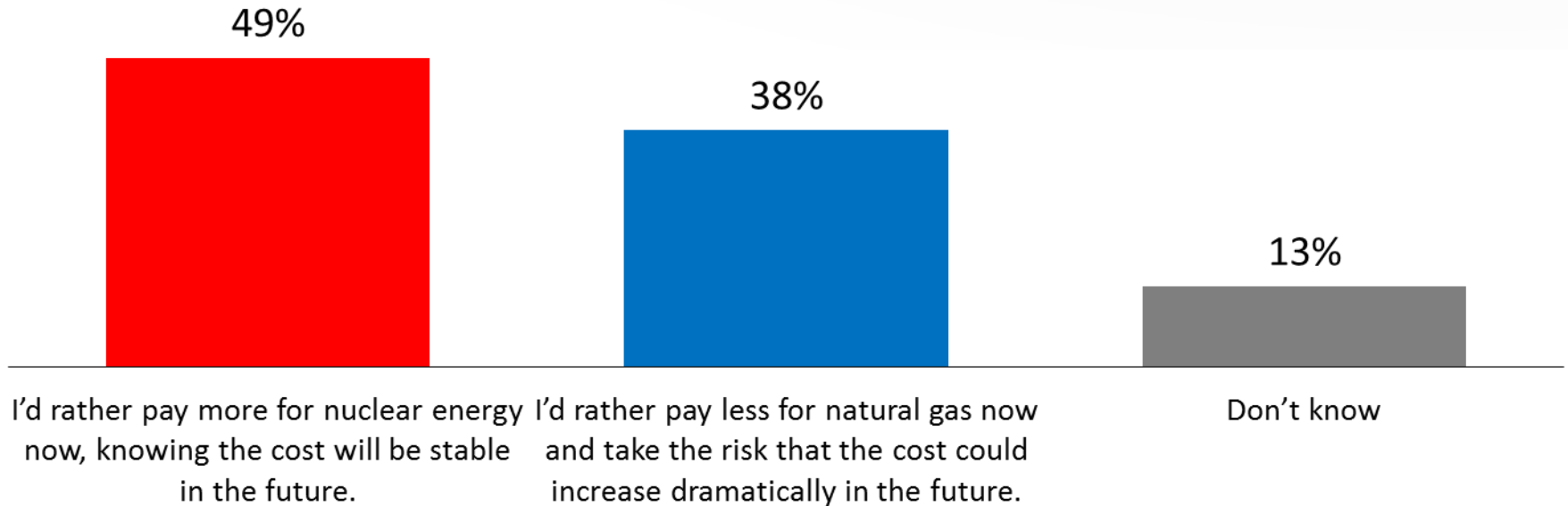


Pay Now or Later – Nuclear or Gas: Nearly half prefer paying more for nuclear now for stable costs in the future

Q

There is a controversy over whether it is better to build more natural gas plants or refurbish existing nuclear plants. Natural gas is cheaper than nuclear energy, but the cost varies over time. Nuclear costs more today, but these costs will be stable over time. With that in mind, which of the following statements is closest to your view?

[asked of all respondents]



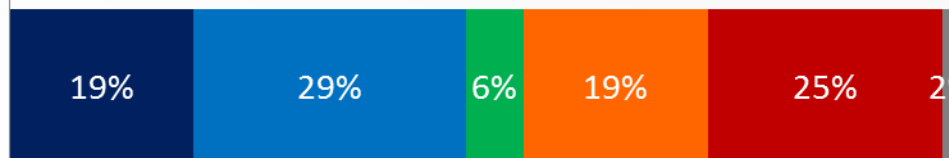
Support for Refurbishment & Cost: Net support low for 10% increase to electricity bill and decreases with higher bill costs

Q Upgrading and refurbishing existing nuclear power plants may result in an increase in electricity prices.

[each question asked of one third of sample, n= approx..200]

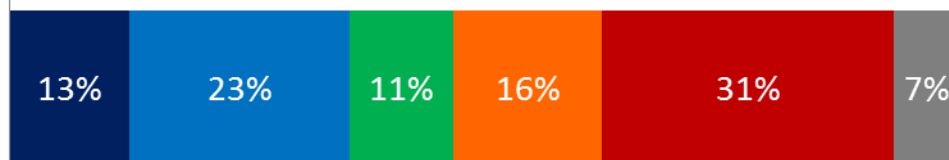
Net 'Agree'

Would you support or oppose upgrading and refurbishing existing nuclear power plants if your electricity bill will grow by 10% a year for the next 10 years?



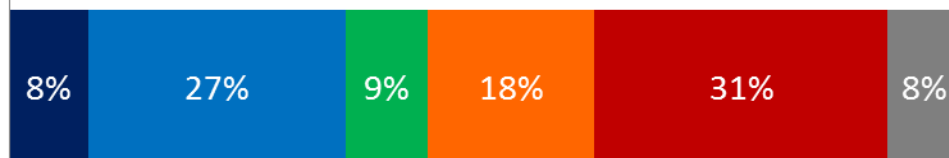
+4%

Would you support or oppose upgrading and refurbishing existing nuclear power plants if your electricity bill will grow by 15% a year for the next 10 years?



-11%

Would you support or oppose upgrading and refurbishing existing nuclear power plants if your electricity bill will grow by 20% a year for the next 10 years?



-13%

■ Much more likely to support
 ■ Somewhat more likely to support
 ■ No difference
■ Somewhat more likely to oppose
 ■ Much more likely to oppose
 ■ Don't know

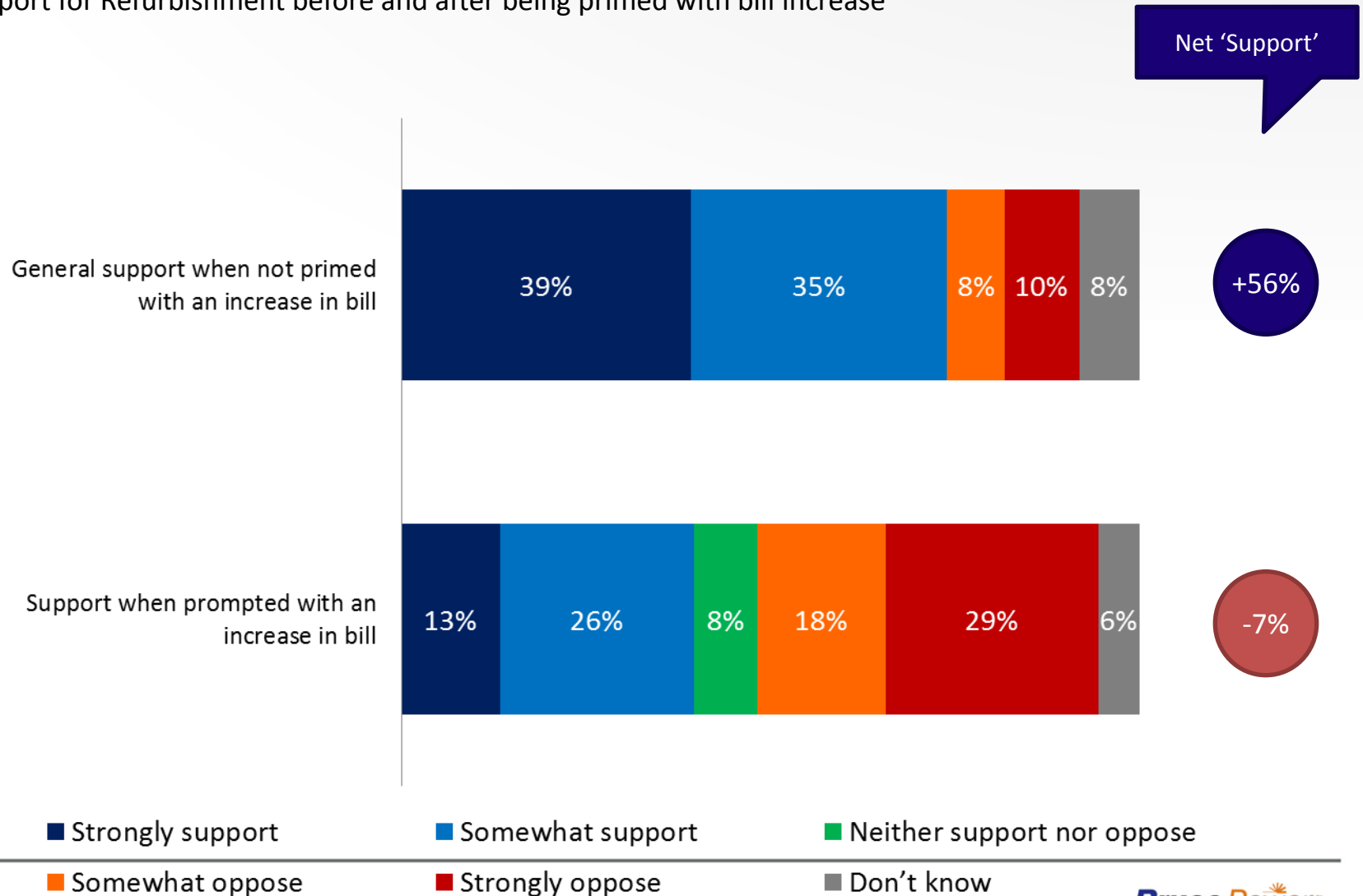


Innovation at work

Note: Refused not shown.

Effect of Bill Impact: Net support drops significantly from when prompted with bill increase

Support for Refurbishment before and after being primed with bill increase

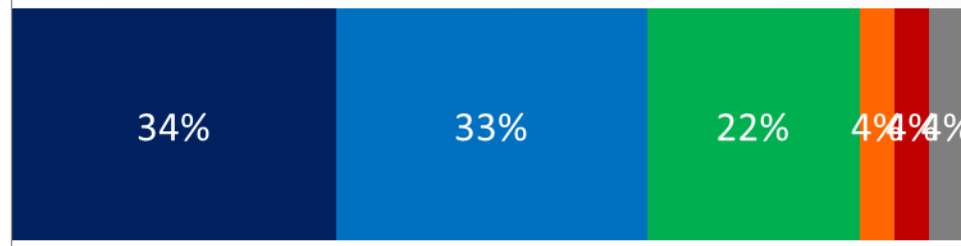


Note: "Neither support nor oppose" was not given in the question when bill increase was not primed

Medical Benefits: Both statements regarding medical benefits increase support for nuclear

Q I am going to read you a couple of statements regarding Ontario's Bruce nuclear power plant, which is located in Kincardine. For each one, I'd like you to tell me if it leaves you more likely to support or oppose nuclear as a way of producing energy. If it makes no difference, please say so.
 [asked of all respondents]

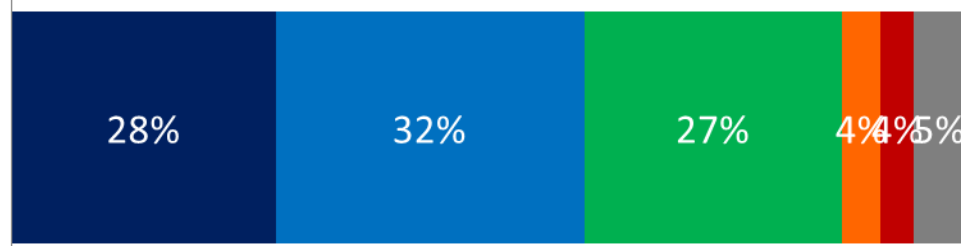
The Bruce Power plant is one of a limited number of nuclear reactors in the world that produces a medical isotope called Cobalt-60 that is used in radiation to treat cancer and other diseases, like Zika, around the world



Net Support

+59%

Ontario's Bruce nuclear power plant is a leading global supplier of Cobalt60 a radioactive isotope used to sterilize 40 per cent of the world's single-use medical equipment.



+53%

- Much more likely to support
- Somewhat more likely to support
- No difference
- Somewhat more likely to oppose
- Much more likely to oppose
- Don't know

Takeaways

- Collectively, we need to recognize **we can't take anything for granted**. Fossil fuels, renewables all want a piece of our role
- Everyday, we need to **focus on getting our message out** and aligning it with MPP's, MP's and localizing the impact
- We need to take every opportunity to tell our story – based on key planks of **low-cost, jobs, innovation and medical isotopes**
- ONA is building an emailing list of our key supporters that we can mobilize in a highly political environment
- Significant provincial **government activity** over the next three months including the roll-out of third party reports – OCC, CME
- Move away from messages around **overall investment numbers/spend** and move toward messages around **jobs, work getting done, innovation and efficiency**

A wide-angle photograph of the Toronto skyline across the water, featuring the CN Tower and various skyscrapers under a clear sky. The text 'We power more for less.' is overlaid in large white font on the left side of the image.

We power more for less.

Questions?

Lunch and the Afternoon

- Lunch
- Golf
- Event Wrap-up with the CEO