The Ford Government Goes Nuclear

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INTRODUCTION

Ontario, along with the rest of the world, has entered into a new era of energy transition. Ontario faces a projected 75% increase to its electricity demand by the year 2050 (Ontario Newsroom, 2024). This demand is projected to continue to grow beyond this, due to rapid industrial electrification, population growth, and the ever increasing utilization of electricity in our modern society. Meanwhile, governments across the world face societal pressure to decarbonize their electricity grids, while ensuring long term sustainable energy reliability. In order to meet this task, the Ontario government under Premier Doug Ford has pushed forward its strategy to expand nuclear energy investment and capacity, while at the same time restructuring the province's energy and environmental governance frameworks. This approach is embodied by Bill 214, the Affordable Energy Act, which has restructured how energy decisions are made, shifting power away from independent regulatory institutions and toward direct ministerial control. An equally important piece of legislation to understand the Ford government's approach to nuclear energy is Bill 5, the Protect Ontario by Unleashing our Economy Act, which aims to speed up infrastructure and resource development by amending environmental regulations and standards, yet has met pushback from key indigenous and environmental advocacy groups. This amended governance framework has come at the same time as federal-provincial alignment between the Ontario provincial government and Canadian federal government on the fast tracking of major nuclear projects, such as the Darlington Small Modular Reactor (SMR), which the federal government designated as a “nation-building project” in 2025. That being said, it is clear that the Ford government recognizes the need for Canada to make a clean energy transition. They also recognize the competing objective of commercial and industrial growth. Therefore, nuclear energy investment is a pragmatic middle

ground that appeases the voter base through job creation, infrastructure development, and the fact that it is not being stylized as a solution to climate change, rather as a national security necessity and economic opportunity. Investment in Ontario's nuclear sector will continue to elevate its position in the world on its tech, and perhaps foster a competitive advantage in nuclear energy production over all other jurisdictions. Hence, it is vital to ask, why is the Ford government pursuing nuclear infrastructure investment so heavily, and why is it choosing nuclear over other clean energy options? This paper will demonstrate that the Ontario government is doing so in order to foster job creation, industrialization, competitive advantages in nuclear technologies, and to meet future electricity demand, in a manner that elevates Ontario's place in Canada, and on the world stage. It is doing so as a political and economic industrial strategy rather than as a climate strategy. This paper sets out to examine the wider implications of the Ford government's approach to the expansion of nuclear energy as a means to these ends, as it exists within the context of Ontario's ever evolving energy landscape, complex federal-provincial relationship, and the political economy of clean energy infrastructure development as a whole.

BACKGROUND

The Ford government is attempting to reduce regulation surrounding Nuclear Energy infrastructure in order to expedite its development and construction of necessary facilities. This is only possible due to federalism and cooperation between Ontario's provincial government, and the Canadian federal government. The Ford government is pursuing this path given the inevitable renewable energy transition the world is undergoing, and the Ford government's preference for nuclear energy over other types of renewables has been clearly articulated through its policy (Crawley, 2024). That being said, nuclear is not technically a renewable energy source. Instead, it is considered a low-carbon or clean energy source, given its use of a finite fuel, uranium, yet it releases minimal carbon emissions in its energy generation process. Such an approach to clean energy and infrastructure governance has generated significant debate over how the balance between infrastructure development, environmental protection, and government transparency should be struck. Supporters of Ford's approach argue that nuclear energy expansion, in particular SMR's, is essential to meeting future electricity needs, while securing Ontario's place on the world stage as a clean energy producer and nuclear technology exporter, made possible by domestic technological advantage.

From 2009 to 2017, the previous Ontario Liberal government under Premier Kathleen Wynne utilized, then phased out, feed-in tariffs as an energy policy tool (Stokes, 2013). A feed-in tariff (FIT) is a policy that guarantees a fixed price for renewable electricity fed into the grid, encouraging investment in green energy technologies like solar and wind. Policy experts consistently characterize feed-in tariff (FIT) policies as the most effective instrument to support large-scale, rapid renewable energy deployment (Stokes, 2013). Ontario's feed in tariff policy was largely successful, attracting investment used to support numerous projects that progressed the province towards a more diversified and cleaner electricity mix. Despite this, the FIT program came up against mounting political and financial criticism over the tenure of the Ontario Liberal government. Concerns included high electricity costs, contractual obligations, and

the unequal distribution of sites chosen for renewable energy projects. Ultimately, the FIT program and its contracts were formally ended in 2017 as the Ontario Liberal government underwent a period of fiscal tightening. This was a defining moment, signaling the shift away from an expansive renewable energy program that had been the norm throughout the 2010s.

One of the Ford government's first policy actions when they came to power in 2018 was to dismantle what remained of the Liberal renewable energy agenda, including the cancellation of over 750 renewable energy project contracts, which included projects already under construction (Crawley, 2024). This was justified on the grounds of cost saving, and ending wasteful, ideologically motivated Liberal spending. This move was also one of the first indications of the Ford government's strategy, shifting to a centralized, capital intensive, big government approach, despite the parties branding as small government. This must be situated within the context of the Ford government's policy behavior. The Ford government has consistently pushed for deregulation, project fast-tracking, red tape reduction, and a consolidation of power to ministerial authority. This is evident in numerous recent government bills and actions, such as Bill 214, Bill 5, and Bill 33, all of which remove bureaucratic processes, and consolidate power within Ministries. For example, the greenbelt scandal exposed the Ford government's attempts to get around planning processes and environmental regulation. These examples highlight the various instances in which the Ford government moved to roll back regulation, and illustrate a consistent governing ideology or philosophy in which regulatory and bureaucratic processes are seen as obstacles to economic growth, job creation, and infrastructure development, and that they must therefore be done away with. That being said, the Ford government’s approach to nuclear governance complicates this understanding. Nuclear energy is federally regulated by the Canadian Nuclear Safety Commission (CNSC). The CNSC oversees safety regulation, licenses nuclear facilities, and has direct authority over radioactive materials (Canadian Nuclear Safety Commission, 2025). Therefore, provincial governments are unable to directly regulate nuclear and radioactive substances, but they do have a say in infrastructure approvals, the

GOVERNANCE RESTRUCTURING

Bill 214, the “Affordable Energy Act”, passed in 2024 embodies the Ford government's approach to energy policy, and marks one of the largest shifts in Ontario’s electricity governance in decades. The bill replaces Ontario’s long term energy framework, which previously included a multi-year consulting process led by the Independent Energy System Operator (IESO) alongside the Ontario Energy Board (OEB), and replaces it with new integrated energy plans (Ontario Ministry of Energy and Electrification, 2024). An integrated energy plan issued by the Minister includes goals pertaining to the affordability of energy, energy availability, reliability, transmission, and distribution, the enhancement and expansion of energy infrastructure and resources to support economic growth and trade, energy infrastructure and resources to support economic growth and trade, energy infrastructure modernization, indigenous consultation and reconciliation, and finally the prioritization of nuclear power generation to meet future increases in the demand for electricity in a manner that is consistent with the policies of the Government of Ontario. The wording of Bill 214 clearly illustrates the Ontario government's prioritization of nuclear energy in order to meet “future increases in the demand for electricity”. This is a landmark objective in a country that is so economically dependent on oil and LNG. Bill 214 also emphasizes *“the role of electricity, natural gas, hydrogen and other energy resources, as well as energy efficiency, storage and demand management, in building a clean energy economy”*

(Ontario Ministry of Energy and Electrification, 2024). The choice of words of “clean energy” rather than “renewable energy” again emphasizes the Ford government's commitment to nuclear energy over renewables. The objectives of Bill 214 are consistent with other Ford government policies. In particular, it follows the trend of “slashing red tape” around infrastructure projects. Bill 214 largely achieves this goal in the field of energy. It is important to note that removing bureaucratic or legislative obstacles to infrastructure development is no longer a partisan or controversial issue.

The Carney government has largely sought to do the same on a national scale through Bill C-5, One Canadian Economy Act. Bill C-5 seeks to reduce federal barriers to interprovincial trade in order to make it easier for goods, services, and workers to move between provinces and territories (Prime Minister of Canada, 2025). It also aims to designate, and subsequently fast track, so-called national interest projects. These are projects that the federal government, through the Major Projects Office (MPO), sees as vital to Canada’s economic growth. The MPO acts as the singular reviewer of project assessments, taking a “one project, one review” approach (Government of Canada, 2025). The coincidentally named Ontario provincial Bill 5, the Protect Ontario by Unleashing our Economy Act has similar aspirations. Schedule 9 of Bill 5 creates the Special Economic Zones Act, 2025 (SEZA), which grants the Lieutenant Governor broad powers to create regulations which designate certain areas of the province as special economic zones, while granting power to the Minister of Economic Development, Job Creation and Trade to designate projects which SEZA would apply to (Cockburn et al., 2025). After a project has been designated, the Lieutenant Governor can exempt trusted designated projects from requirements under any act within a designated special economic zone. The intention is to streamline project approvals, environmental assessments, and infrastructure projects in general, however the broad sweeping powers granted to the Minister and Lieutenant Governor have raised concerns over how these powers could be used. For example, the Minister could simply exempt a major polluting project from completing environmental assessments if the project fell within an SEZ. This has garnered significant pushback from many environmental and indigenous

groups (Ruf, 2025). That being said, the coordination between federal and provincial governments on major energy projects can be understood as a form of energy federalism. Federalism plays an important role in the governance of energy infrastructure, particularly when there are provincial and federal bills focused on the same or competing objectives. Research has demonstrated that when overreach by the federal government occurs, conflicts may arise with provincial governments over things such as land use, electricity grid expansion, and local acceptance of federal policy (Saurer et al., 2020). On the other hand, so-called "cooperative federalism" has promoted policy adaptability and resilience for provincial governments to be able to withstand sudden policy shifts in federal priorities. From this perspective, the Ford government is fortunate to have a federal government who is also seeking to slash regulation and centralize energy governance on similar terms to itself.

In 2025, the Darlington SMR project was designated as a nation building project by the federal government, which makes it eligible for fast track approvals through the Major Projects Office established under Bill C-5. This is notable, given the partisan differences between the Ontario PC's and the federal Liberals, yet both governments have clearly aligned on nuclear energy as a strategic national priority. In addition to this, the CNSC has determined that the already existing environmental assessment for the Darlington nuclear project can be applied to the GE-Hitachi SMR reactor design, expediting the process by eliminating the need for a new environmental assessment. This significantly shortened the project timelines, yet was widely criticized by environmental and indigenous groups who argue SMR's, and the project fastracking itself, pose environmental and safety concerns. Criticism has also been levied over the cost of the project itself. Observers have pointed out that the recently completed Saskatchewan 377 megawatt natural gas power station cost $825 million, opposed to the $21 billion it will cost to construct the four BWRX-300s at Darlington (McClearn, 2025).

SOCIO-ECONOMIC INCENTIVES

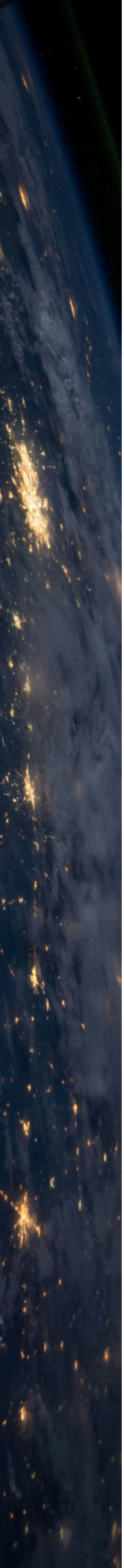
The economic incentives behind the Ford government's investment in nuclear energy infrastructure are important in understanding the context in which the aforementioned legislative decisions are taking

place. Bruce Power, with eight CANDU pressurized heavy-water reactors, until 2016, was the world's largest fully operational nuclear generating station by total reactor count and the number of currently operational reactors as a case study. Bruce Power, in 2001, employed 3% of Bruce County's population (Bruce Power, 2001). This partially demonstrates the economic incentives and job growth from investment in such projects, particularly in rural areas. When completed, the first small modular reactor in Darlington is expected to provide 300 megawatts of power, enough electricity to supply about 300,000 homes. The federal government says the reactor would support 200 high-paying jobs, in addition to 1,600 jobs during construction (Draaisma, 2025). These projects will also provide future jobs given the need for maintenance and repairs over time. This is especially important for the Port Darlington and Durham region given the fact that GM is shifting much of its production from Oshawa to Fort Wayne, Indiana (Raveendran, 2025). The loss of manufacturing and trades jobs could have potentially devastating effects on the local economy, and therefore further investment in nuclear infrastructure in this area is a necessity to secure people's livelihoods. Hence, it is clear from this perspective why the federal government would promote the jobs created by investment in these types of nuclear projects, especially in convincing local populations of their benefits. This hasn't always worked for nuclear energy projects. For example, the community of Teeswater, near bruce county in rural Ontario voiced significant opposition to government plans for a nuclear waste storage dump near the community (Trevithick, 2024).

On the 26th of November 2025, Minister Stephen Lecce announced the Ontario government has approved Ontario Power Generation's (OPG) plan to refurbish four CANDU nuclear reactors at the Pickering Nuclear Generating Station for $27 billion dollars. The stated reason for this refurbishment is to protect Ontario's long-term energy security, as it will allow the Pickering facility to provide affordable and clean power for as long as 38 years. This refurbishment will also create 37,000 jobs, according to the. Ontario government, 6,700 of which will be sustained past refurbishment. This is yet another Ford government policy targeted at establishing, or in this case refurbishing, nuclear energy infrastructure in the province. The title of the news release of this

particular initiative is particularly interesting and reinforces the narrative that Ford's nuclear strategy is really about job creation, industrialization, and growth. The Ontario government news room titled it "Ontario Greenlights Pickering Nuclear Generating Station Refurbishment to Create Nearly 37,000 Jobs" (Ontario Newsroom, 2025). Once more, the jobs created by this infrastructure project are clearly the most important aspect of it, given the Government's choice to include the statistic in the title, rather than choosing to highlight something like the amount being spent on it, how much clean energy this will provide, or how this will progress Ontario towards a clean grid. Once the refurbishment project at Pickering has been completed, it will generate an increased capacity of up to 2,200 megawatts of electricity, equivalent to powering 2.2 million homes, according to the government.

In addition to domestic development, the Ontario government is using nuclear energy and SMR's as a means to expand inter-provincial and international trade and relations. For example, in October 2025, Ontario's Minister of Energy and Mines Stephen Lecce joined Nova Scotia's Premier and Minister of Energy Tim Houston in Halifax to sign an agreement to collaborate on the development of small modular reactors (SMRs) (Ontario Newsroom, 2025). This was followed by a $60 million deal with New Brunswick in order to improve the productivity of the Point Lepreau nuclear facility (Hansard, 2025). In this sense, nuclear energy investment and development appears to be a common goal of many provincial governments, and has fostered interprovincial collaboration on the matter. In addition to interprovincial agreements, Minister Lecce also met with Belgian officials to explore the potential deployment of Ontarian SMR's technology in Belgium (Hansard, 2025). Including previous contracts and agreements, such as with Poland and Estonia, Minister Lecce claims there to be 24 SMR agreements or projects secured to date. According to the Minister, this nuclear infrastructure build out plan is expected to contribute $160 billion to Canada's GDP in the construction phase, and $630 billion during operations, with around 80,000 jobs created during the former, and 64,000 during the latter (Ontario Newsroom, 2025). This demonstrates the Ontario government's commitment to interprovincial nuclear



investment, but even more interesting is the international. It is clear that the government sees significant potential for the sale of Ontarian SMR technology to allies in Europe and across the globe. This is extremely interesting, especially given the geopolitical context in which Europe exists, heavily reliant upon Russian LNG and energy exports. Therefore, given this analysis, it becomes clear that the Ford government is strategically positioning itself as an alternative partner to Russian and Chinese SMR's, Russian energy exports, and renewable energy projects, in the hopes that Ontario becomes the primary market for clean nuclear technology.

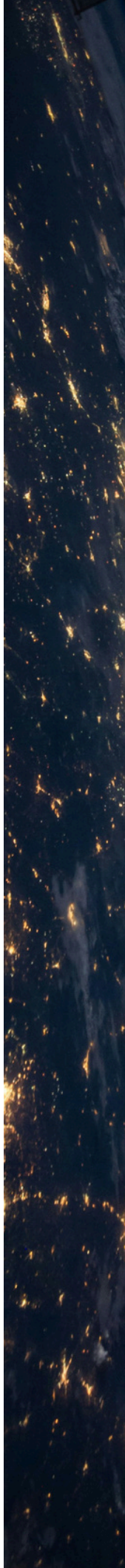
NUCLEAR VS. RENEWABLES

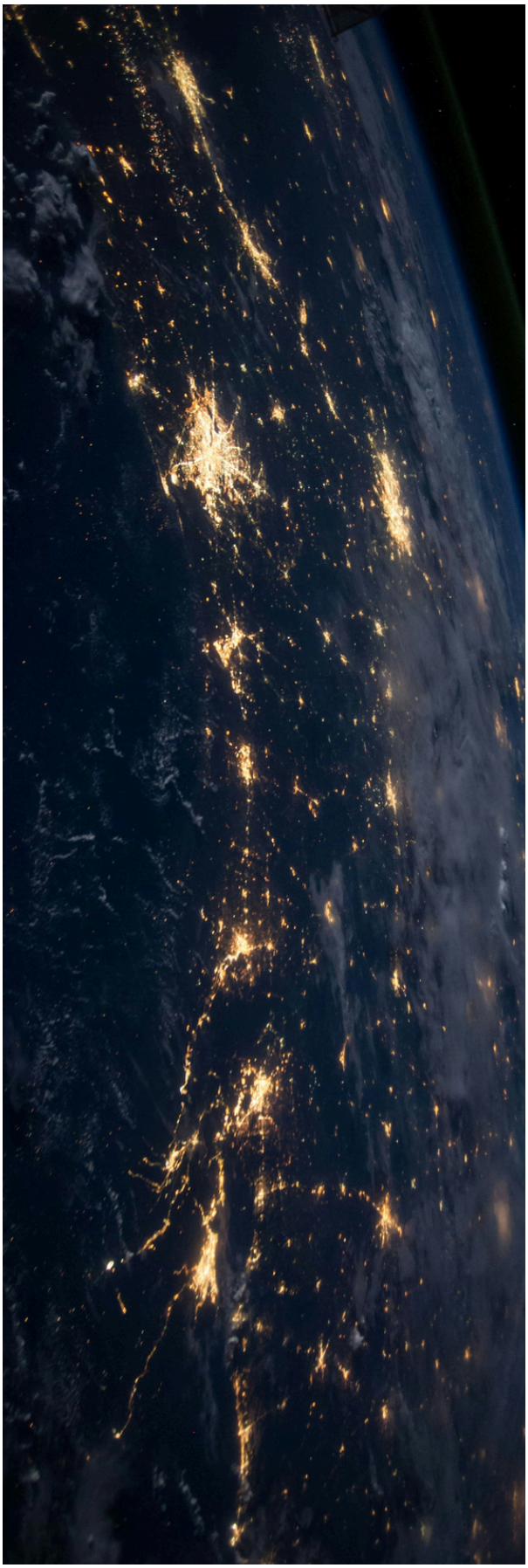
The Ford government's focus on nuclear investment as opposed to other types of clean energy raises an important question. Why focus on nuclear rather than cheaper and faster renewables, such as wind and solar? We can begin to answer this question by calling back to the Ford government's cancellation of 750 renewable energy contracts, their vocal opposition of wind projects, and a general political stance emphasizing the unreliability of renewables. This framing hits home with many PC party voters, who may associate renewables with rising electricity costs and a negative disposition towards environmental regulation. Nuclear energy, on the other hand, is being styled by the Ford government as technologically sophisticated, capable of powering the province into the future and fueling economic growth, creating a modern techno-industrial development narrative. Critics of SMR and nuclear infrastructure investment point to long construction times, high costs, and low rewards. They argue that the development timelines are not aligned with Ontario's 2030 emissions targets (Goranson, 2025). This is evidenced by a report on SMR's, which predicted their baseline electricity cost to be 16.3 cents per kilowatt hour (kWh) (Canadian Small Modular Reactor Roadmap Steering Committee, 2018). On the other hand, onshore wind electricity costs an average of 4.5 cents per kWh, offshore wind an average of 10 cents/kWh, solar farms an average of 6.6 cents/kWh, and hydro an average of 5 cents/kWh (Goranson, 2025). Therefore, critics argue that the opportunity cost of SMR development is too high, and that Ontario would be better off investing in solar, wind, and hydro energy projects that are cheaper to construct, and produce

energy to consume. That being said, it seems highly unlikely that the Ontario government is soon to change from favouring nuclear to renewables, given their current intensive investment into the nuclear sector.

RISKS, TRADEOFFS, AND POTENTIAL MITIGATIONS:

Reduced oversight from Bill 214, alongside a consolidation of authority to the Ministries, creates risk in the form of reduced oversight and the expedition of government processes. It opens the door to inefficiencies and errors. Bill 214 and Ontario's Bill 5 together represent a dramatic restructure of Ontario's energy governance, moving authority from independent regulators to direct government control. The creation of SEZ's where projects are able to bypass environmental and other project assessments according to the will of the Lieutenant Governor and Ministers poses significant risks if projects are fast tracked without due regard for safety and environmental conservation. Bill 214 replaces the previous long-term energy planning framework, which was led by the Independent Electricity System Operator (IESO) and overseen by the Ontario Energy Board (OEB), with a system in which the Minister of Energy issues Integrated Energy Plans that the IESO must support and implement. This change gets rid of the IESO's role as the primary designer of long term planning, as well as the transparency and consultation requirements that previously existed within the process. Meanwhile, the environmental concerns surrounding nuclear waste, and the potential disastrous political consequences in the unlikely event of a nuclear incident, leave little room for gaps in processes, assessments, or information. Nuclear waste disposal and storage is often an afterthought in these discussions, however it is one of the most important aspects in expanding nuclear power generation. Without proper storage plans, sites, and facilities, the environmental consequences of improperly disposed of nuclear waste can be disastrous. This issue is compounded by the fact that communities near nuclear waste storage facilities may push back against their construction, as occurred in the case of the community of Teeswater. That being said, investment in the expansion of Ontario's nuclear infrastructure has the potential to foster long term benefits that offset the upfront cost. As previously mentioned, Ontario is an early investor in SMR

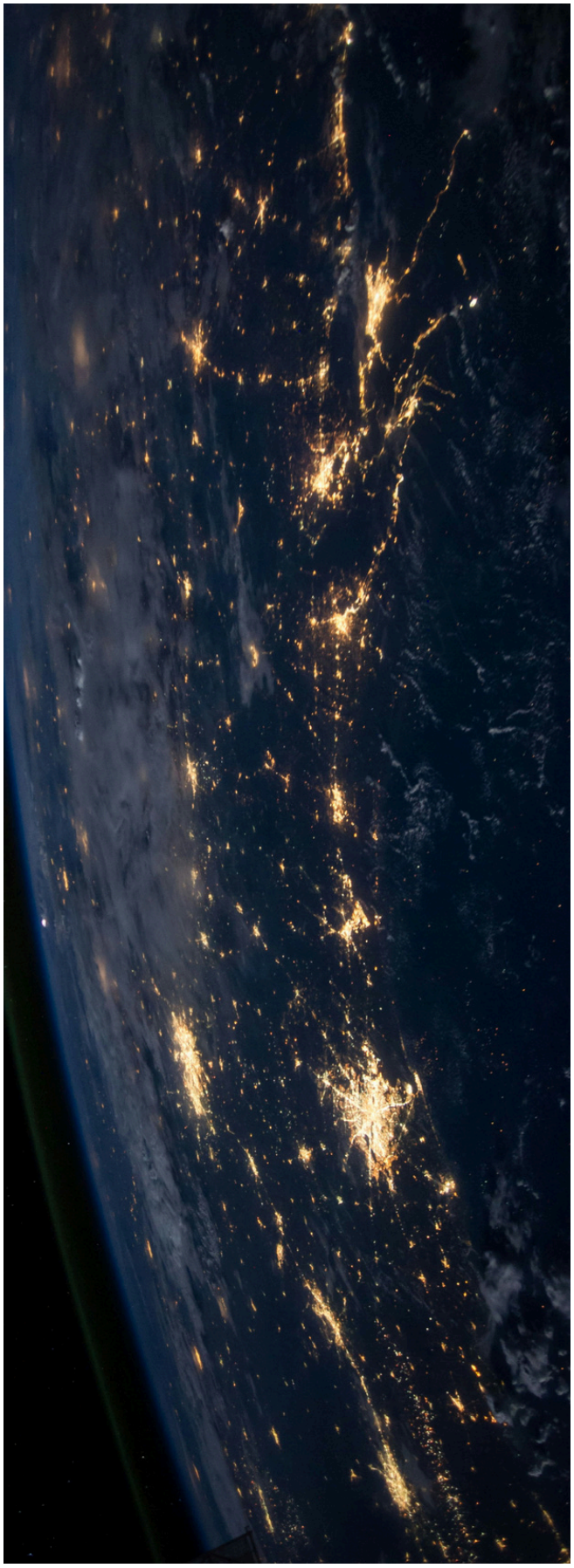




technology, which is still an emerging technology sector. BWRX-300s at Darlington is the first of its kind in North America, and has the potential to foster a competitive advantage for Ontario to export this technology across the globe, creating economic gains as well as the potential for new international partnerships (Gevernova-Nuclear, n.d). It has the added geopolitical benefit of being the first SMR of its kind outside of Russia and China, meaning countries historically allied with Canada will likely look to Ontario before others. Additionally, Ontario's nuclear sector makes significant contributions to global medical isotope production, particularly through the production of cobalt-60, which is utilized in cancer treatments and other medical procedures (Bruce Power, 2024). That being said, the reduced governance from Bill's 214 and 5 remains a cause for concern in regards to effective environmental governance. It is vital that both the Federal and Ontario governments work together to strengthen regulatory frameworks, without increasing redundancies, and maintain strong nuclear oversight through organizations such as the CNSC.

CONCLUSION

The expansion of and investment in Ontario's nuclear energy infrastructure by the Provincial Ford government illustrates a vast reorientation of provincial energy and governance frameworks. This restructuring has been primarily achieved through the passing of Bill 214, Bill 5, and federal-provincial collaboration as represented by Bill C-5, which have each allowed for the expedition of major infrastructure projects. While this approach reflects the Ontario government's commitment to addressing issues such as electricity demand, and the need for clean energy, it has also raised concerns regarding environmental preservation, regulatory transparency, and the role of other renewable energy sources. Despite this, nuclear energy continues to present great advantages to Ontario. It provides large-scale, resilient, and clean power, while creating long term local employment opportunities, and positioning the province as an early adopter of SMR technology, which may have important geopolitical and commercial benefits down the line. The Ford government's use of this approach is primarily motivated by an attempt to foster such benefits, and it is therefore admirable. However, it certainly remains true that a more balanced investment



approach, one that considers renewables in conjunction with nuclear energy, would likely reduce electricity costs, while continuing to shorten development timelines, therefore appeasing a larger proportion of the Ontario voter base. To put all of one's eggs in one basket is never advisable.

Overall, the Ford government is attempting to walk the line between numerous contentious policy issues, while appeasing a voter base that supported the cancellation of 750 renewable projects upon this government's ascent to power. They are pursuing nuclear energy investment as a means to foster job creation, industrialization, competitive advantages in SMR's, and to meet future electricity demand, but are doing so through regulatory consolidation and restructuring of the political economy of Ontario's energy that could be harmful if long term planning is not carefully considered. However, it remains clear that they are doing so as a political and economic industrial strategy rather than as a climate strategy. The Ford government has recognized nuclear energy investment as a pragmatic middle ground that appeals to their voter base through job creation, infrastructure development, and the fact that it is not being stylized as a solution to climate change, rather as a national security necessity and economic opportunity. The payoffs of this strategy could be massive, seeing the province become the world's supplier of SMR technology, creating unimaginable domestic benefits. However, it remains to be seen whether this government's approach to the governance of and investment in nuclear energy will pay off.