

**CUSHMAN &
WAKEFIELD**



The **Planning** Partnership



EMPLOYMENT LAND STRATEGY APPENDIX

CITY OF GREATER SUDBURY
JULY 2022





July 15, 2022

To: Melissa Riou, MAES, MCIP, RPP
Senior Planner – Community and Strategic Planning
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City of Greater Sudbury

Re: City of Greater Sudbury Employment Land Strategy – Appendix

This document serves as an Appendix to the Employment Land Strategy main report. The purpose of this Appendix is to provide additional background information and technical data.

Respectfully submitted,

Cushman & Wakefield

A handwritten signature in black ink, appearing to read 'agbrowning'.

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APPENDIX 1 – SUMMARY OF STAKEHOLDER INPUT

Introduction

With assistance from City staff, the Consultant Team reached out to a range of stakeholders with varied backgrounds across the local market. These consultations included one-on-one interviews, small group discussions, and larger working group meetings. The scope of participants included the following:

- City of Greater Sudbury staff from various departments;
- Greater Sudbury Development Corporation (GSDC);
- City of Greater Sudbury Mayor and City Council members;
- Representatives from Atikameksheng Anishnawbek First Nation and Wahnapiitae First Nation;
- Various community groups, institutions, and infrastructure providers (Chamber of Commerce, Laurentian University, Cambrian College, Collège Boréal, Health Sciences North, and Greater Sudbury Airport);
- Various local business and major employers (including Glencore and Vale); and,
- Local real estate market participants (developers, landlords, brokers, and appraisers).

Some of the outreach took place at the outset of the project (discussions with City staff; Mayor and City Council members; Greater Sudbury Development Corporation; and various community groups and institutions), in order to inform our background review. Later, once the land supply analysis had been completed, we engaged with various local businesses and major employers, as well as real estate market participants (developers, landlords, brokers, and appraisers), in order to gain insights to guide our strategic recommendations.

All stakeholder consultation was conducted on a confidential basis, such that comments cannot be attributed back to an individual or organization. The fact that so many participants were willing to have their voices heard reflects the level of interest in this project, and their desire to effect positive change in the community. It is clear to the Consultant Team that there are a lot of passionate supporters of the city, which has been a lifelong home for many. As there are a range of stakeholders with varied backgrounds, some of these comments expressed below will appear to contradict one another; this is to be expected, and illustrates divergent viewpoints on an issue.

Input from Mayor and Councillors

The following section presents a summary of the Consultant Team's discussions held with Mayor Bigger and five members of City Council regarding the Employment Land Strategy. These interview notes are grouped into thematic areas. Additionally, where specific locations/areas were identified by one or more interviewees, these have been noted as geographic-specific issues.

Common Themes

Employment Land Locations

- There were several geographic-specific comments (see below). General themes are:
 - Sudbury must ensure that it has the right employment land in the right locations. Included in this is addressing lands held by large mining companies which are “employment land”, yet are held by the mining company for buffering their operations from adjoining land uses. Two key points on the mining lands: first, these buffer lands should not be counted as employment lands for growth planning, as the lands will not be developed; second, many of these properties are along the City’s Nodes and Corridors, which means there will be undeveloped lands on the Corridors.

Consultant Team note: As noted in our report, lands designated Mining/Mineral Reserve have been excluded from our analysis, and are not taken into account in calculating future employment land needs.

 - Employment land is largely in private ownership, and prospective occupiers rely on the private market to bring the land to development. One councillor indicated that private sector land should be purchased by the City and marketed for employment.
 - City-owned land is not listed on MLS because no commission is paid. Need to ensure effective marketing of City-owned employment land.

Infrastructure

- Transit Hubs – the transformation of Sudbury Transit to be more focused on a “hubs” model of service delivery was identified. Opportunities for transit-oriented development (jobs and housing) at these hubs was also identified.
- Stormwater – there is an issue with interpretation and requirements for applicants. The City is looking to establishing a rate-based stormwater fee.
- Understand where infrastructure capacity is (road, sewer, water) and leverage the adjoining lands for job growth.
- Maley Drive (Phase 2) – securing funding for this infrastructure to connect across Falconbridge Highway. Opportunity to leverage 100-120 hectares of a former sandpit for employment development.

Labour Force

- The labour force in Sudbury is not huge.
- The needs of seniors is an underserved market from a business/labour force perspective.
- The service industry is a growth opportunity in Sudbury. Understand what the needs of Sudbury citizens are, and focus on those.

Downtowns

- Key themes for downtowns:
 - Recognize that there are multiple downtowns, as Greater Sudbury is an amalgamated municipality.
 - In the smaller communities, downtowns need updated Zoning By-laws (see Arts/Culture and Housing themes).
 - Ensure downtowns and areas where major office is located have permissive zoning so uses that attract workers (restaurants, parks, etc.) are walkable from the major office areas.

Nodes and Corridors Study

- This study was identified as a key achievement for the City. The interviewees specifically mentioned not just the study but the implementation tools that were put in place to ensure private development was attracted to these areas:
 - Official Plan update;
 - Zoning update;
 - Development charge reduction; and,
 - Reduced parking standards.
- There is a tie-in to the Employment Land Locations theme – along the identified corridors in the Nodes and Corridors study, some corridors have mining lands adjacent to them and others have Crown lands. Both of these land ownership/use issues mean that the mining and/or Crown lands are not available for employment land/area development.

Leveraging Multiple Municipal Tools

- One key theme that came out repeatedly in the interviews was the importance of doing several things well in order to see success. These include:
 - Updated Official Plan policy;
 - Updated Zoning By-laws (came across for Nodes and Corridors, Downtowns, and Housing themes);
 - Ensuring infrastructure is planned and implemented to support growth; and,
 - Use of incentives (brownfields, downtowns, housing) to support targeted areas for growth.

Customer Service

- Several interviewees brought the customer service centre in City Hall forward as an important step in providing welcoming access to the City. Additional feedback included:
 - Consistency in application of regulations for applications;
 - Need to have escalation approaches defined so that customers can get resolution to their application that is timely; and,
 - Proactive updating of regulations and by-laws to address the current economy (e.g., food clusters such as micro-breweries, local food/produce businesses; arts and cultural economy – live/work space, and artist's studios).

Reducing Red Tape

- There are three key areas of feedback under the theme of “reducing red tape”:
 - (1) The SPART (Sudbury Planning Applications Review Team) process was mentioned as a key success. Suggestions to improve on the SPART process are:
 - » Create “swim lanes” based on customer type/capacity. For example, a swim lane for a large employment land development would be different than a swim lane for a small business in one of the historic downtowns looking to expand or add housing above the main street retail. The concept is that not all customers have the same resources or capacity to hire consultants, prepare applications, etc. The customer experience should be tailored to the customer capacity; and,
 - » Create defined expectations on timelines/submissions in order for a decision to be reached. Identify what triggers escalation of a file.
 - (2) A business expeditor position was identified as an important next step. The expeditor would work with customers and internal staff to assist with inquiries, remove roadblocks, and make sure customers are connected with the right people who can answer any questions.

- (3) Community Action Networks are areas where councillors and residents work on community issues. These were identified as opportunities to advance conversations and build support for Sudbury's future, and to help Council understand the community's priorities.

Implications of COVID-19 Pandemic

- Many councillors brought up the current global pandemic as an opportunity for Sudbury to market itself for those working at home. The thinking is that Sudbury is highly attractive in terms of housing availability and price; the quality of life opportunities are significant – especially for those seeking year-round activities; and the health care system is strong, with Sudbury being a regional health care centre.
- There are concerns about the office sector and need for office space given the number of people working from home during the pandemic.

Sector-Specific Themes

Mining

- Every councillor interviewed spoke of opportunities in the mining sector. Key areas of focus are:
 - Employment and economic development strategies to leverage automation and advanced robotics/technology in the mining sector. There are many companies in Sudbury that support the mining industry, including tech companies. It is important to focus on employment strategies that meet the needs of these firms.
 - In many of these companies, their market reach is beyond Sudbury (and especially further north). These companies make Sudbury a tech hub for the mining sector.

Office

- The focus of the feedback on the office sector was trying to understand the pandemic implications on the office market and space needed for office use in Sudbury.

Retail

- The precarious nature of employment in the retail/service industries was discussed. The global pandemic has highlighted the reality of employment insecurity in these sectors.

Housing

- Housing is an area where several important themes came forward. The housing sector contributes to economic growth. Sudbury's typical housing costs are such that there are opportunities for people to relocate to Sudbury to find reasonably priced housing. Key opportunities include:
 - Leveraging the super-malls (C5 Zoning District) to add multi-residential buildings (mid-rise, tall buildings) with no additional parking or shared parking;
 - Exploring opportunities to generate new housing to serve retirees/seniors – either for rental tenure or home ownership. This keeps retirees/seniors in their homes longer, and makes available existing homes for families. Work with the building industry to support single-storey homes for seniors; and,
 - Focusing housing support for downtowns, including updating Official Plan and zoning provisions for all downtowns.
- A key concern is that residential landowners are holding onto their land, which contributes to a tighter housing market.

Health Care and Post-Secondary

- Both are growing sectors for Sudbury's economy. Key points:
 - Similar to other uses, infrastructure upgrades are needed; and,
 - As the population grows, these two sectors will grow. Sudbury needs to be ready for this growth (with required land and infrastructure).

Arts and Culture

- Leverage the arts and culture sector – especially the Franco-Ontarian Arts Sector – with the new Place des Arts (currently under construction).
- Ensure the Official Plan and Zoning By-law reflect current best practices in support/regulation for the cultural economy.
- Tie opportunities for arts and culture sector support, Official Plan, and zoning, to downtowns – leverage the vibrancy of the arts/culture sector with Downtown reinvestment.

Geographic-Specific Issues

Coniston Industrial Business Park

- There has been a proactive approach with respect to development in this Business Park and the Coniston community. This includes:
 - Upgrading infrastructure through cost-sharing with businesses/property owners; and,
 - New residential is being built in proximity to the Business Park (retirement home and single-family residential).
- Stormwater continues to have capacity issues in this Business Park.

Falconbridge Road (East Sudbury)

- This is a success story where the City provided both incentives and infrastructure to support job growth.

Kingsway Entertainment Area

- Several councillors identified the Kingsway Entertainment District as a key opportunity for the city. The matter is currently before the Local Planning Appeal Tribunal (LPAT), so information sharing in the interviews was limited/kept brief.

LaSalle Boulevard East

- Infrastructure upgrades are needed to develop vacant lands in this area (fire flow and water upgrades are needed). Leverage the new connection to Maley Drive.

Valley East Industrial Business Park

- This Business Park has the following challenges:
 - Servicing capacity is highly limited, which restricts business growth for those in the Business Park – both additions on current buildings and developing remaining vacant land;
 - There is land to the east of the current Settlement Area boundary (east side of Belisle) that is owned in part by the City and in part by private owners. There is interest in bringing this land into the urban area, acknowledging that servicing is a challenge; and,
 - In order to achieve the requirements for a Land Needs Assessment, it was suggested that a swap occur with land in the Suez area coming out of the urban area in favour of lands on the east side of Belisle that are currently outside the Settlement Area boundary.

Walden Business Park

- Within this Business Park, the issues are related to servicing. The Business Park has many properties serviced by private water wells, which limits the size of buildings/businesses for reasons of fire flow. The need for upgrades to the water infrastructure was a priority for Walden East.

Other Stakeholders Input

The preceding section summarizes the Consultant Team's interviews with Greater Sudbury's Mayor and a group of City Councillors. The following section presents a summary of our consultations with a range of other stakeholders. The variety of topics that were explored was broad, and guided by the background and expertise of the interview subjects. The Consultant Team has distilled our many conversations into a set of themes, as presented below.

Land Availability and Site Selection

- There is lots of employment land available – we have no shortage of land.
- False impression that all the land across the city makes it easy to initiate development.
- Dispersed nature of the city means that land servicing is a challenge – bringing water, wastewater, roads, etc.
- Business wants to invest where its best for them – varied land needs.
- Employment land needs to be available where businesses seek to situate, needs to be appropriately serviced, and needs to be the right size (i.e., already subdivided into lots).
- There is limited demand for dry industrial. Lands need to be serviced.
- Proximity to transportation corridors is important for many users.
- Some users seek industrial sites with rail spur access for transportation of materials and goods.
- Yard space is an important element for many users.
- Some occupiers seek sites with rock on the property in order to test/demonstrate equipment.
- Users want to situate in Sudbury and Valley East.
- Lands on the west side of Sudbury are desirable for mining supply and services firms – offers proximity to active mining operations.
- Some local land developers are only seeking tenants to build for – not willing to sell off lots to prospective owner-users.
- Considerable land holdings controlled by two mining companies (Glencore and Vale). City lacks a framework to work with mining companies to get lands made available for non-mining purposes, where such potential exists.
- Greater Sudbury Airport has vacant lands suited for employment uses, including air-side sites. However, it is located away from most employment activities in Greater Sudbury. The Airport's employment lands would be on a land lease arrangement, and have varying levels of servicing presently in place.
- Some available and designated lands are not in desirable locations. Some has remained undeveloped for decades, and there is no likelihood of demand.

Land and Development Costs/Issues

- Historically, City-owned lands were a challenge to private developers (i.e., viewed as a competitor).
- Decision was made to allow private landowners/developers to run the marketplace. City got out of the land development market (though a few remaining undeveloped sites persist).
- City shouldn't add (acquire) land to compete with existing private landowners. Not realistic for City to buy land and become a developer.
- Need to encourage development where existing infrastructure capacity remains.
- Expand and improve existing employment areas – don't grow elsewhere.
- Downtown office space is suited to firms seeking younger workers – they want nice workspaces, and an "urban" setting. However, social and public health issues are problematic in the area.
- Some roads – particularly in industrial areas – are in poor condition.
- The City has excessive fire flow requirements, and there are stormwater management challenges. Water tanks are required for sufficient fire flow in some locations.
- Curbs and sidewalks and gutters aren't really needed in industrial areas. Sudbury's industrial areas are more utilitarian in nature. These features just unnecessarily increase the cost of development.
- The nature of the geology – rock almost everywhere – makes it more expensive to build. Also, building trades costs are higher than other markets. Therefore, required economic rent in Sudbury is higher than other locations.
- Land price is a challenge to attracting new development.
- Land costs are not significantly higher than in other competitive markets.
- Mixed message from developers... it is very expensive to develop, yet there is still lots of activity.

Business and Industry Comments

- The outlook from the business community is generally positive – although the longer-term effects of the COVID-19 pandemic on the local economy remain uncertain. Some sectors continue to perform well, while others are severely impacted (tourism, hospitality).
- Pre-pandemic, the local commercial real estate market was performing well.
- Industrial sector outlook appears positive.
- Light industrial and service commercial has a promising outlook.
- Mining supply and services also has bright future.
- City needs to be ready when opportunities strike – not reactive. Particularly true for natural resource-related activities such as mining and lumber, which sets Sudbury apart.
- There are emerging opportunities to export technology and engineering from Sudbury as a base.
- There is demand in the industrial market – it will continue to absorb space.
- There is currently a shortage of industrial floorspace (buildings) available, and a surplus of office space available.
- 1 acre up to 3-4 acres – with buildings that are 15,000-20,000 sf in size – is the "sweet spot" in the local industrial market. Manufacturing uses may require larger facilities.
- Greater Sudbury is very spread out, with many small downtowns.
- There is no suburban office park. Downtown is the only office cluster of significance.
- Road/highway upgrades have improved access around the city.

- Roads in industrial areas need to be paved/resurfaced to industrial standards.
- Growth is needed – can't increase the tax burden on existing companies, as this will drive away businesses.
- City must weigh fiscal impact of managing current assets (and reinvestment) versus pursuing growth.
- Get the CP Rail yard moved out of Downtown to unlock land for development. A “pipe dream” – who would pay?
- Entrepreneurs are taking profits and then investing in other markets because there aren't local opportunities. But these businesspeople are already believers in Greater Sudbury... “Don't turn them away!”

Mining-Related Comments

- Local mining sector is highly integrated – exploration, extraction, milling, smelting, and refining.
- Sudbury has the largest mining supply sector in Northern Ontario.
- Each direct mining job generates 2-3 mining supply/services jobs.
- The sector includes “blue chip” firms all the way down to small firms with only a few employees – wide spectrum of land users.
- Typical space requirements include 20,000-40,000 sf industrial buildings, or small office premises to accommodate start-up enterprises.
- Railside sites are important for the mining sector to move materials.
- City faces limitations to provide rail sidings and sufficient power to some locations.
- Some mining-related developments are strictly for the lifespan of the project – they may be abandoned post-project. A temporary use. Therefore, hard to plan for longer-term needs/re-use of a site.
- Mining companies require buffers around operations in order to meet regulatory requirements regarding atmospheric off-site receptors. These lands must be owned, which inhibits potential land dispositions. However, lands that are not within airsheds are conceivably developable.
- Mining companies hold surface rights across a vast land area. However, some lands do not have proven reserves, and these are potentially surplus assets.

Planning Policy Perspectives

- The City is too rigid in designating land uses. Permissions should be relaxed.
- Zoning By-law is too restrictive. Want flexibility in planning policy to be responsive.
- City should allow broader zoning to facilitate repurposing of premises to new uses. There is a lot of overlap of commercial zones in particular.
- Tenants sometimes cannot wait for rezoning, which is not guaranteed to be successful in the end. So, the landlord is stuck with excess vacancy.
- If a site-specific rezoning is obtained (which requires time and effort), and the user eventually vacates, another rezoning may then be required. “Too much red tape!”
- City should provide incentives to spur development and help existing areas expand, while ensuring accountability of private sector developers.
- City should permit motivated landowners to obtain needed redesignations to foster growth.
- City should permit motivated landowners to bring their lands within Settlement Area boundary to promote near-term development opportunities.

City Hall Perspectives

- City Hall is not customer-service focused.
- Perception of “red tape” and roadblocks at City Hall.
- Cost is not the primary problem in the development process... timing is. “Unlock the bottleneck.”
- Getting through the development process – “It is the bane of our existence.”
- Perceived lack of consistency and equity in approvals process.
- City needs to treat the approvals process in a more businesslike manner – they are vying with others (competing markets) for economic opportunities.
- The bureaucratic development process: “Too many people trying to make too many decisions.”
- Inter-departmental friction is a problem at City Hall.
- Not all City departments move at the same speed, and do not always appear motivated to support growth.
- A more streamlined process is required. There is a need for buy-in from all departments involved in the process.
- There is no “champion” to move development approvals along the process.
- The City would benefit from creating the position of a “concierge” to guide applicants through the approvals process.
- Perceived barriers such as slow pace of activity, inefficiency, and too many layers of review to get municipal approvals. Applicants seek assistance – “Tell me what we need to do in order to get proposal approved!”
- So many hurdles to development... traffic study... stormwater management study...needed infrastructure upgrades upstream and downstream... “Don’t you want me to build this building?”
- Timing delays cause businesses to consider locating in other markets that are more business-friendly.
- There is an 8-month construction window (due to climate), but project approvals aren’t expedited as needed.
- Locals are sometimes treated harder than out-of-towners in the approvals process.
- Empower local developers that have skills and knowledge to do more.
- Some occupiers are of the mindset “Where do I not have to build new?” in order to avoid hassle of the approvals process.
- City wants more employment growth and more taxes, but won’t spend money to attract users. Incentives are needed in order to compete.
- Bringing more employment lands on stream under the present bureaucracy means no change will occur.
- “Sometimes the City goes down one path, then things change 180 degrees... it makes it hard to invest!” Sometimes a lack of creativity and trying to find solutions on the part of City staff.

Consultant Team comments on City Hall Perspectives: We have encountered many of the same or similar comments in most (if not all) of the municipalities in which we have worked in the past. A review of City department operations and processes is not a component of this Employment Land Strategy. However, the City must avoid alienating its best “customers” – those developers and businesses with a proven track record of success in Greater Sudbury who already understand what it takes to make a project work in the local market, and are seeking to invest/reinvest in the community. The risk of inaction is that capital will flow to other jurisdictions that are perceived as more business-friendly.

APPENDIX 2 – POPULATION AND EMPLOYMENT PROJECTION EXHIBITS

The following exhibits profile the population and employment by place of work forecasts for the Reference, Low, and High Scenarios from 2021-2046 for the City of Greater Sudbury. The 2016 data (from the most recent Census) is also included, for reference.

Reference Scenario

REFERENCE SCENARIO – POPULATION AND EMPLOYMENT PROJECTION (2021-2046)								
Category	2016	2021	2026	2031	2036	2041	2046	2021-2046
Total Population (persons)	166,130	167,800	169,400	170,400	171,490	172,000	172,990	5,190
All Industries EPOW (jobs)	70,230	68,672	72,758	73,209	74,252	75,119	75,808	8,072
Agriculture, forestry	370	358	363	351	341	327	312	-46
Mining, oil and gas	5,615	5,665	5,997	6,051	6,135	6,150	6,118	452
Utilities	390	431	428	402	382	362	342	-89
Construction	3,135	3,080	3,295	3,340	3,410	3,475	3,533	453
Manufacturing	3,200	2,930	2,969	2,868	2,784	2,671	2,543	-387
Wholesale trade	2,250	2,017	1,957	1,799	1,665	1,539	1,419	-598
Retail trade	9,650	9,095	9,311	9,035	8,834	8,626	8,402	-693
Transportation, warehousing	2,270	2,354	2,604	2,729	2,882	3,037	3,191	837
Information, culture	980	932	954	925	903	879	854	-78
Finance, insurance, real estate, leasing	3,350	3,192	3,306	3,245	3,210	3,172	3,127	-65
Professional, scientific, technical	3,505	3,474	3,720	3,774	3,856	3,932	3,999	525
Other business services	2,325	2,312	2,459	2,480	2,520	2,558	2,591	279
Education	6,395	6,390	6,823	6,899	7,028	7,144	7,242	852
Health, social services	11,340	11,284	12,419	12,971	13,641	14,289	14,914	3,630
Arts, entertainment, recreation	1,120	1,094	1,180	1,206	1,243	1,278	1,312	218
Accommodation, food	5,245	5,302	5,897	6,213	6,590	6,973	7,356	2,054
Other services	2,990	2,919	3,028	2,975	2,946	2,912	2,871	-48
Government	6,100	5,841	6,051	5,947	5,882	5,793	5,682	-159
<i>Note: "EPOW" = Employed by Place of Work</i>								

Low Scenario

LOW SCENARIO – POPULATION AND EMPLOYMENT PROJECTION (2021-2046)								
Category	2016	2021	2026	2031	2036	2041	2046	2021-2046
Total Population (persons)	166,130	167,130	167,870	167,320	166,890	166,180	165,090	-2,040
All Industries EPOW (jobs)	70,230	68,392	71,954	71,574	71,839	72,131	71,812	3,869
Agriculture, forestry	370	354	356	338	324	307	287	-67
Mining, oil and gas	5,615	5,605	5,880	5,839	5,830	5,771	5,633	28
Utilities	390	430	423	393	369	347	324	-106
Construction	3,135	3,069	3,258	3,265	3,299	3,337	3,346	278
Manufacturing	3,200	2,899	2,910	2,766	2,644	2,505	2,339	-559
Wholesale trade	2,250	2,010	1,935	1,758	1,611	1,478	1,344	-665
Retail trade	9,650	9,063	9,208	8,833	8,547	8,283	7,959	-1,104
Transportation, warehousing	2,270	2,345	2,575	2,668	2,788	2,916	3,022	677
Information, culture	980	929	943	904	873	844	809	-120
Finance, insurance, real estate, leasing	3,350	3,181	3,269	3,172	3,106	3,046	2,962	-219
Professional, scientific, technical	3,505	3,462	3,679	3,689	3,731	3,776	3,788	326
Other business services	2,325	2,304	2,432	2,424	2,439	2,457	2,455	151
Education	6,395	6,368	6,747	6,745	6,799	6,860	6,861	493
Health, social services	11,340	11,261	12,333	12,761	13,307	13,860	14,296	3,035
Arts, entertainment, recreation	1,120	1,090	1,166	1,179	1,202	1,227	1,243	153
Accommodation, food	5,245	5,283	5,832	6,074	6,376	6,696	6,969	1,685
Other services	2,990	2,909	2,994	2,909	2,850	2,796	2,720	-189
Government	6,100	5,830	6,012	5,854	5,744	5,626	5,454	-376
<i>Note: "EPOW" = Employed by Place of Work</i>								

High Scenario

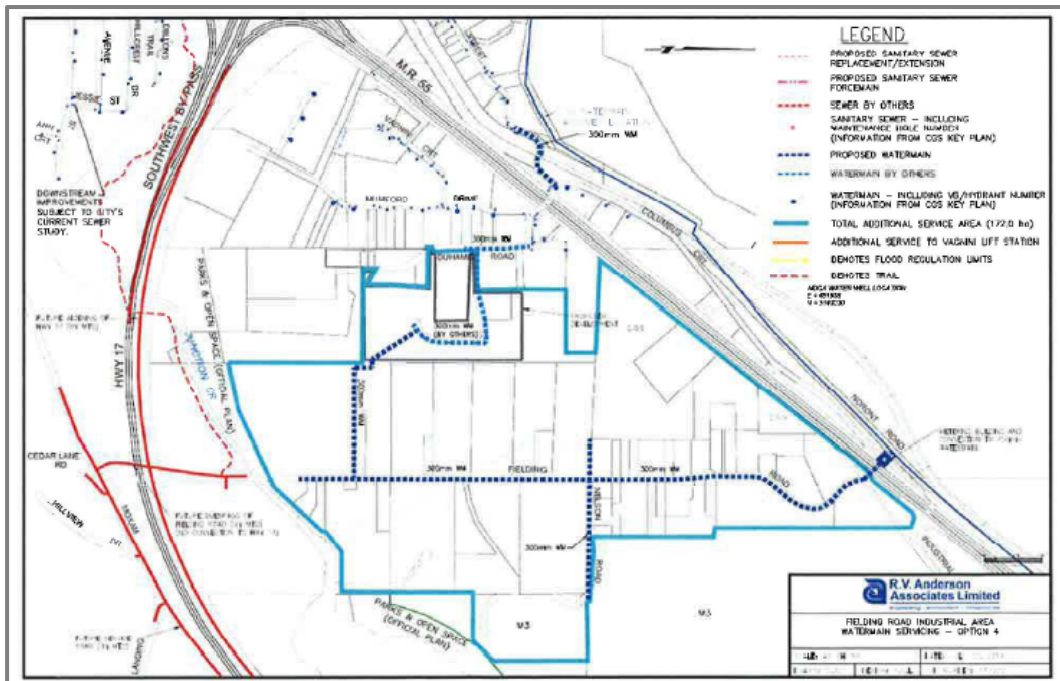
HIGH SCENARIO – POPULATION AND EMPLOYMENT PROJECTION (2021-2046)								
Category	2016	2021	2026	2031	2036	2041	2046	2021-2046
Total Population (persons)	166,130	168,202	168,720	171,340	174,210	176,840	179,200	12,570
All Industries EPOW (jobs)	70,230	65,270	69,030	73,793	75,216	77,037	78,823	12,378
Agriculture, forestry	370	345	362	371	365	360	351	-24
Mining, oil and gas	5,615	5,406	5,730	6,131	6,294	6,472	6,591	892
Utilities	390	415	433	434	414	396	380	-72
Construction	3,135	2,920	3,094	3,341	3,431	3,538	3,647	633
Manufacturing	3,200	2,823	2,965	3,036	2,985	2,938	2,865	-210
Wholesale trade	2,250	1,950	2,026	1,985	1,848	1,728	1,615	-529
Retail trade	9,650	8,701	9,138	9,443	9,282	9,166	9,051	-274
Transportation, warehousing	2,270	2,218	2,365	2,641	2,804	2,990	3,186	1,001
Information, culture	980	892	937	967	950	937	923	-36
Finance, insurance, real estate, leasing	3,350	3,047	3,207	3,352	3,334	3,331	3,328	92
Professional, scientific, technical	3,505	3,294	3,490	3,773	3,877	4,001	4,126	728
Other business services	2,325	2,195	2,323	2,494	2,548	2,615	2,685	411
Education	6,395	6,061	6,420	6,920	7,088	7,291	7,496	1,220
Health, social services	11,340	10,627	11,321	12,546	13,248	14,043	14,851	4,236
Arts, entertainment, recreation	1,120	1,035	1,099	1,196	1,239	1,289	1,341	285
Accommodation, food	5,245	4,991	5,327	5,981	6,383	6,837	7,317	2,434
Other services	2,990	2,785	2,933	3,071	3,057	3,057	3,056	96
Government	6,100	5,565	5,859	6,110	6,069	6,050	6,014	60
<i>Note: "EPOW" = Employed by Place of Work</i>								

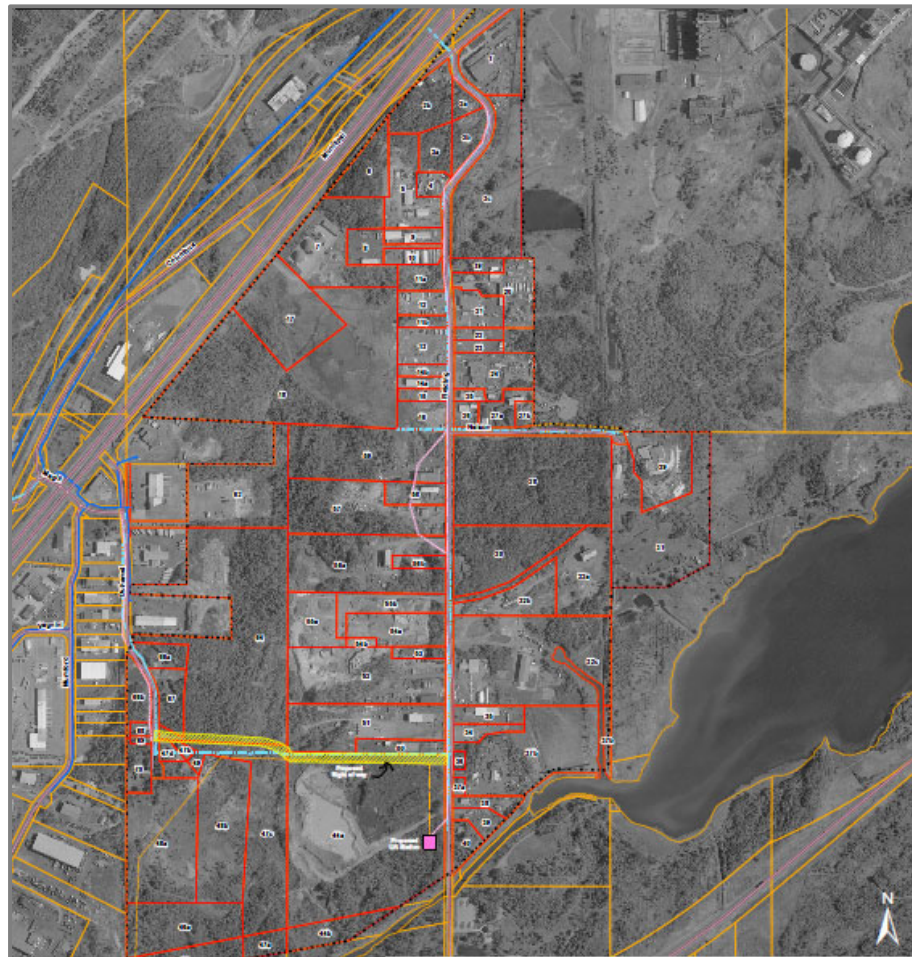
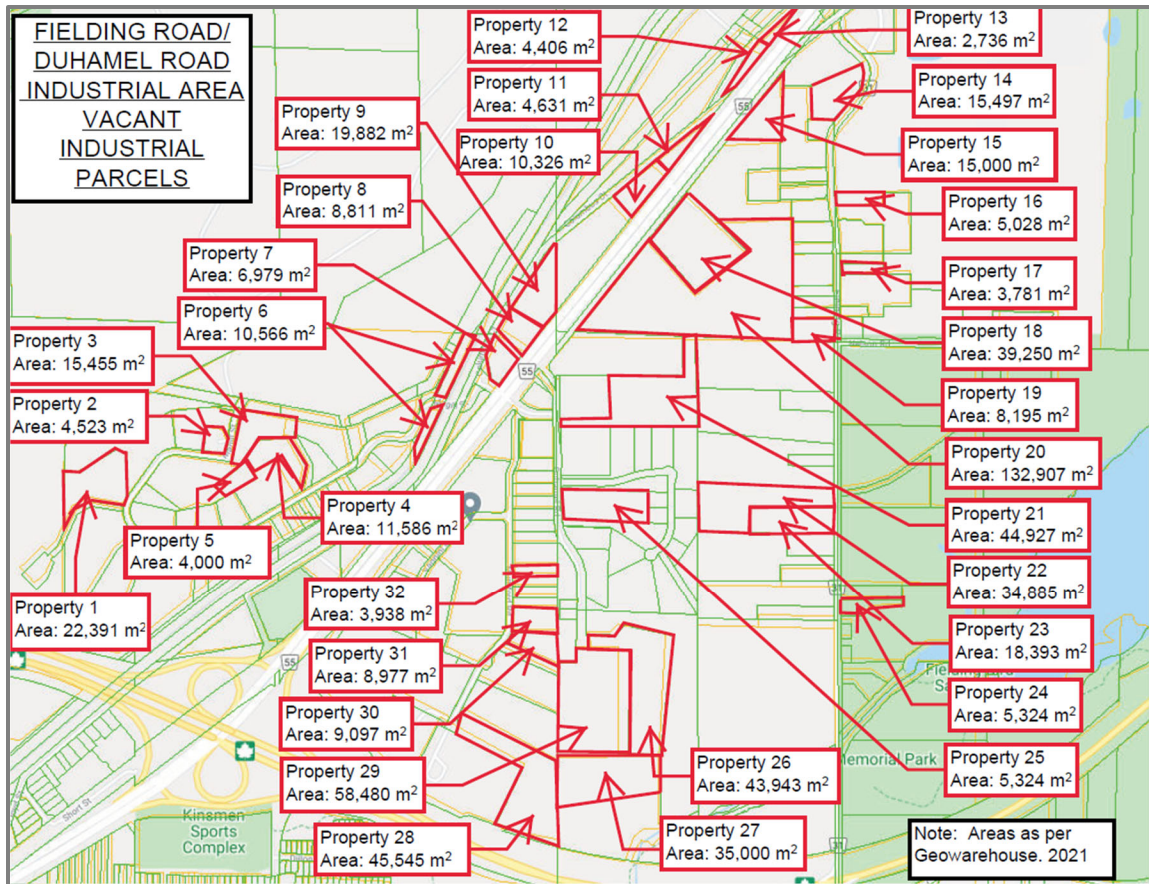
APPENDIX 3 – INFRASTRUCTURE AND SERVICING – ADDITIONAL INFORMATION

Water Services Review

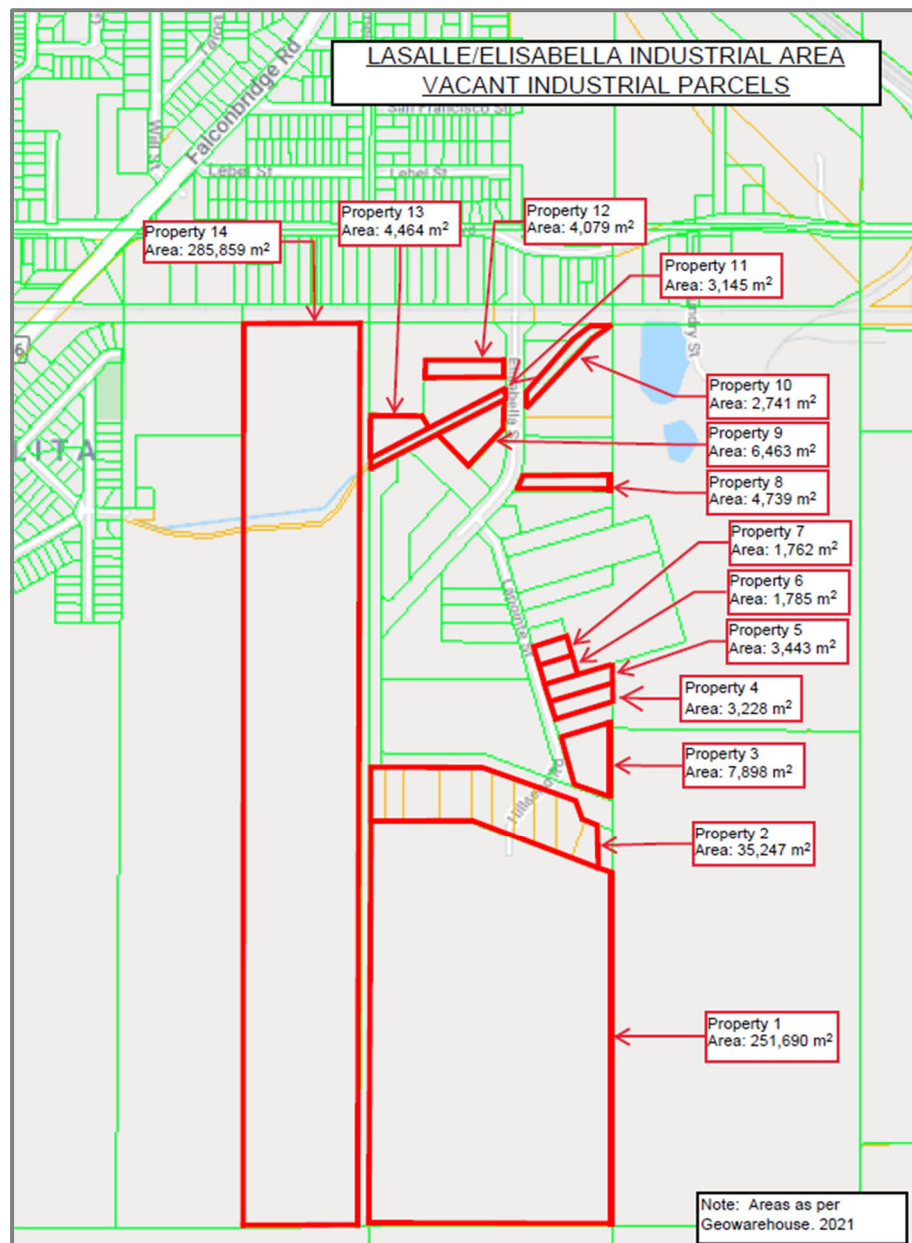
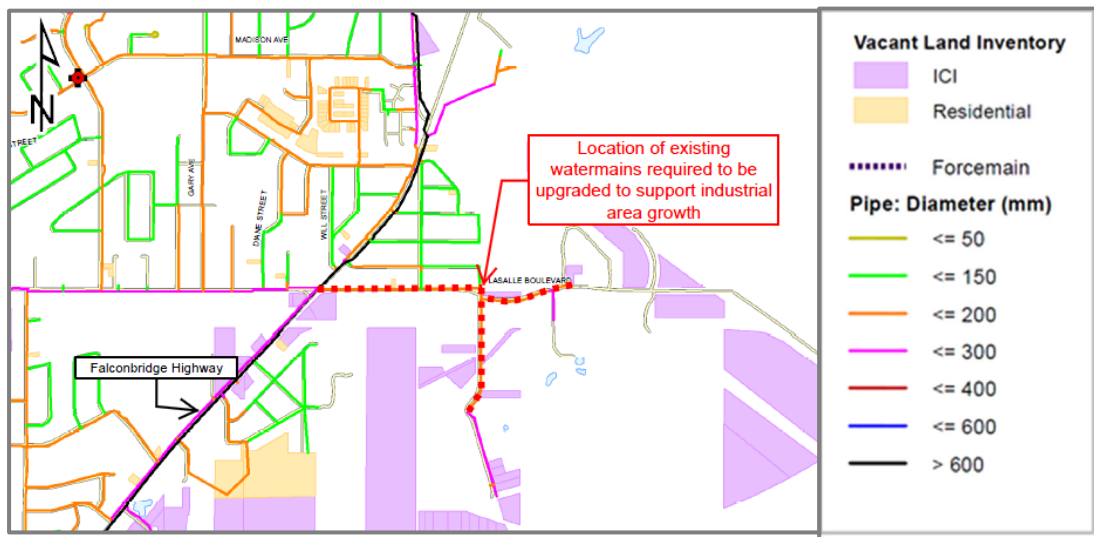
Water Servicing

Fielding Road/Duhamel Road

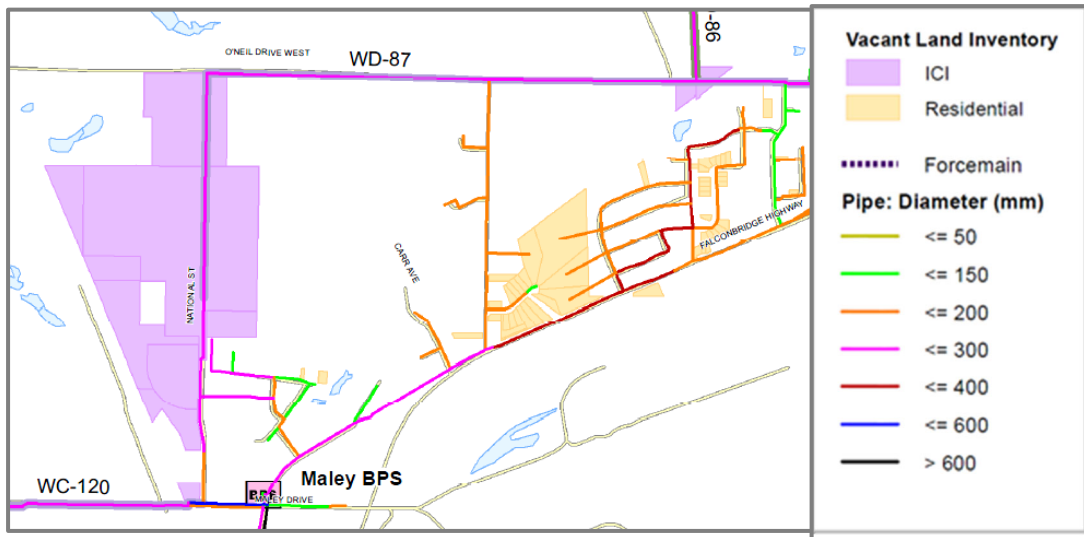




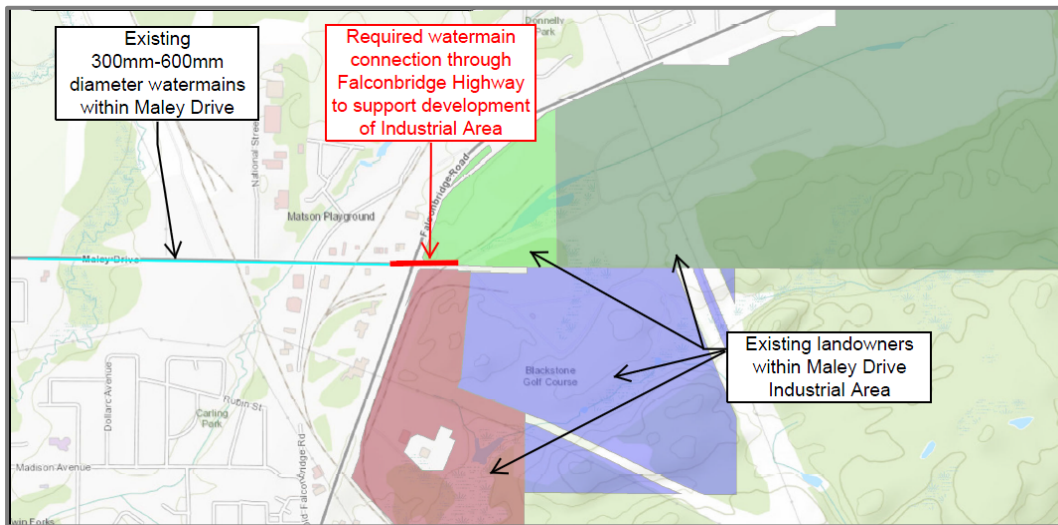
Lasalle/Elisabella



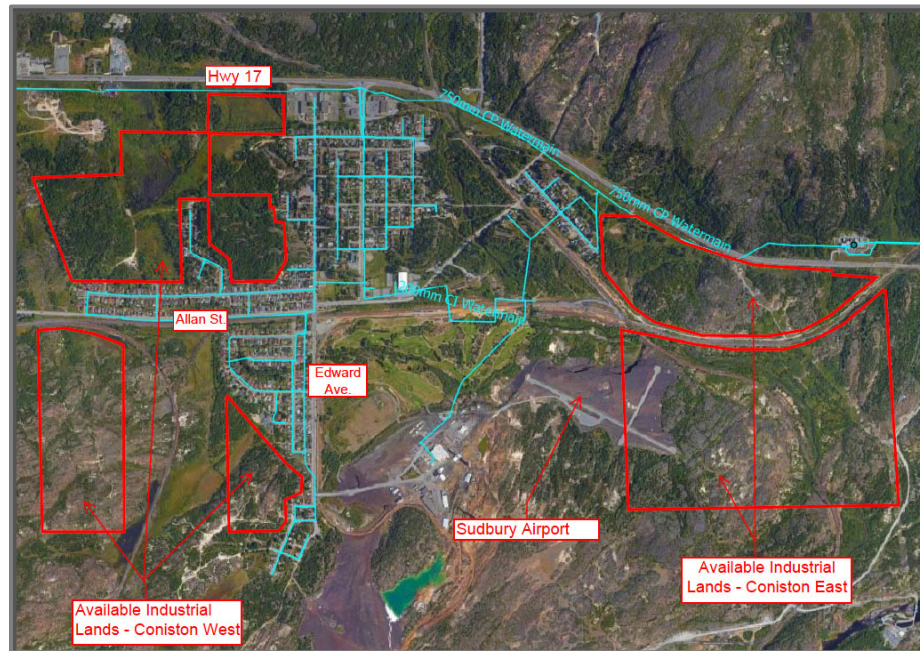
National Street



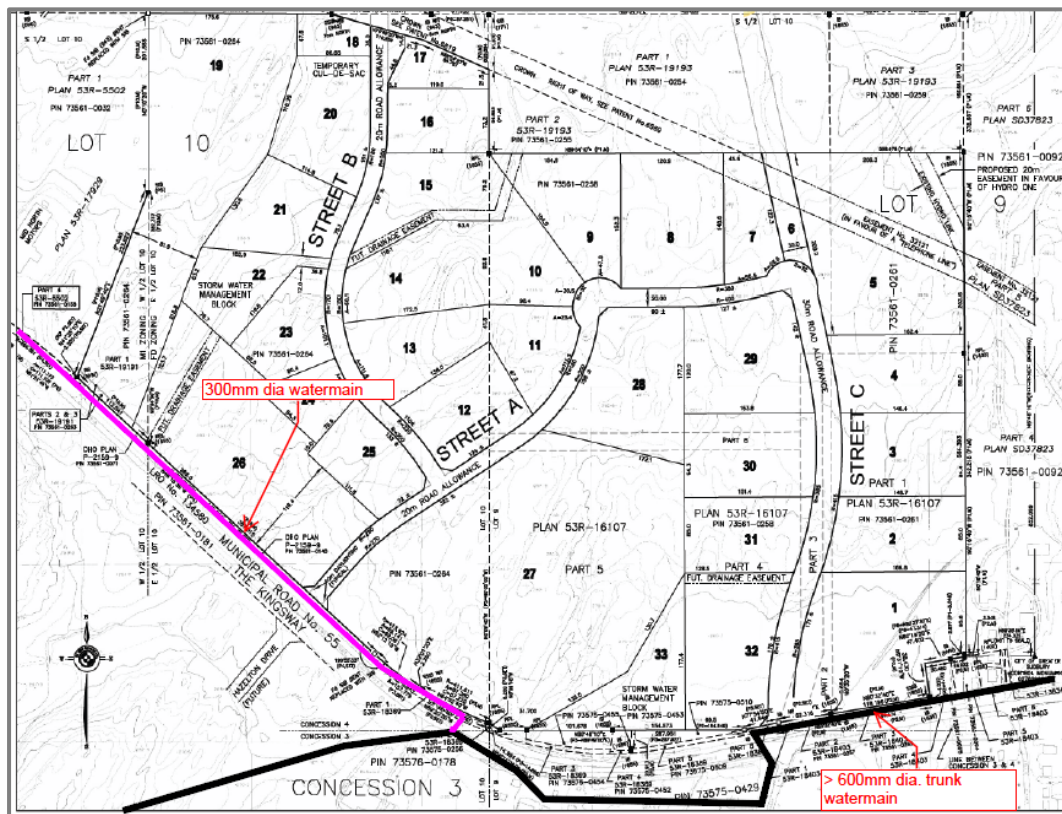
Maley Drive



Coniston



Kingsway



The exhibits below detail development charges related to the Kingsway Sewer and Water Project.

Kingsway Industrial Park - Sewer and Water Enhancements:

On February 28th, 2007 City Council authorized a Section 391 recovery charge and approved by-law #2007-54F on March 7th, 2007, to recover \$3.8 million of growth related costs from benefitting landowners, over a 20 year period, plus interest.

Amount to be recovered from Benefitting Landowners on Kingsway (as of Dec 31, 2021)	\$2,490,773
Add: Accumulated Interest to December 31, 2021	\$1,393,562
Less: Section 391 Charges Collected up to December 31, 2021	(\$57,373)
Balance to be recovered from Benefitting Landowners at the Building Permit Stage (2022 to 2027)	\$3,826,962

It was estimated that \$3.8 million of growth related capital costs will be incurred from 2007 to 2019 and remain in progress until completion. As of December 31, 2021, the City spent \$3,720,885 in which \$2,490,773 is to be recovered from Section 391 charges.

Council approved internal borrowing from the Capital fund, so annual contributions are contributed to reduce this debit balance. There were no Section 391 Charges collected from 2013 to 2020. In 2021, \$50,747 of Section 391 Charges were collected.

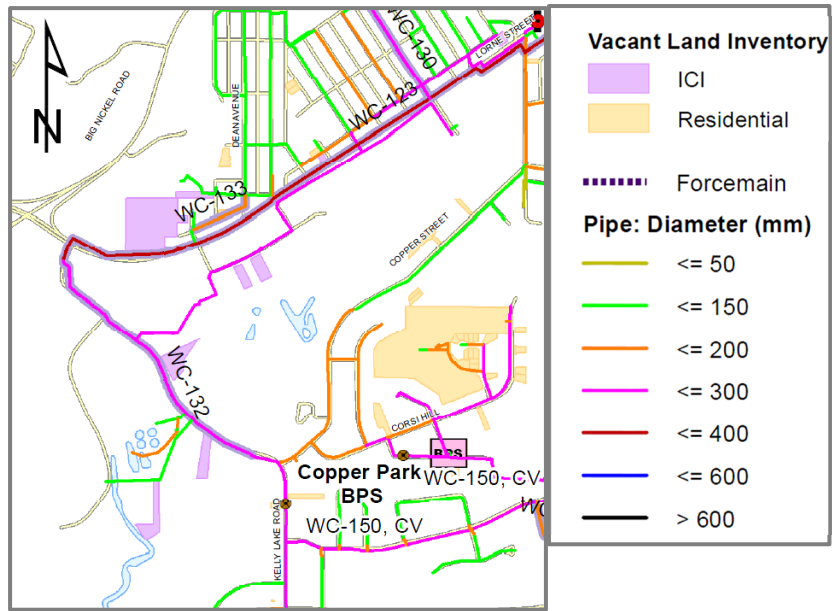
January 1, 2018 to December 31, 2022 rates in accordance with By-Law 2018-45 are \$4,687 for a single residential home, \$2,524 for a multiple dwelling per unit and \$16.49 per square metre for commercial or industrial. These rates were increased on January 1, 2018 (every five year period) to account for the time value of money and the accumulated interest. These charges are in addition to the City's Development Charges since this project was not included in the Development Charges Background Study and related by-law.

Schedule "I"
to By-law 2018-45 of the City of Greater Sudbury

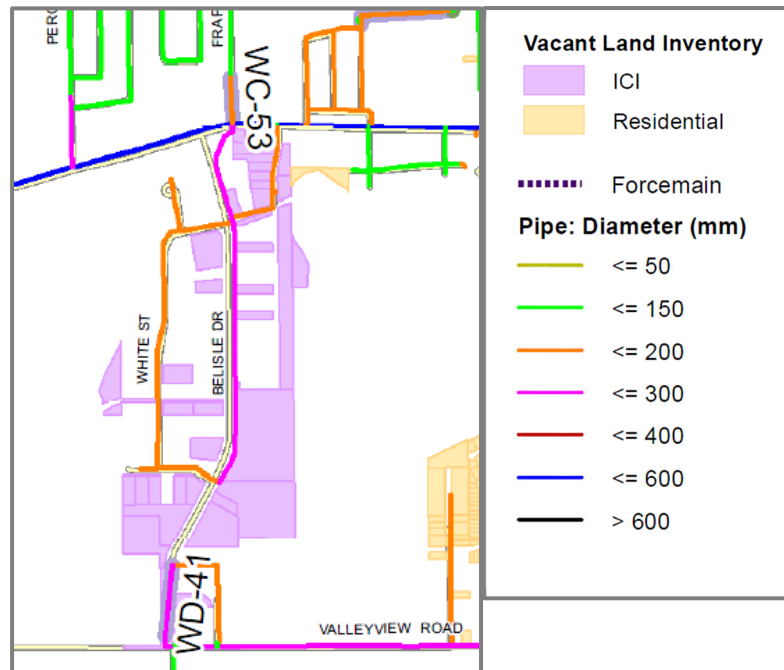
Kingsway Sewer And Water Project Water and Sewer Works Rates

Period		Section 391 Fee		
		Single-detached, Semi-detached, Row dwellings, (per unit)	Multiple Dwellings (per unit)	Commercial / Industrial (per sq. metre)
Years 1-5	Nov 1/07 to Dec 31/12	\$2,617	\$1,409	\$ 9.21
Years 6-10	Jan 1/13 to Dec 31/17	\$3,502	\$1,886	\$ 12.32
Years 11-15	Jan 1/18 to Dec 31/22	\$4,687	\$2,524	\$ 16.49
Years 16-20	Jan 1/23 to Dec 31/27	\$6,272	\$3,377	\$ 22.06

Ceasar Road



Valley East



Water Modeling

The exhibits below illustrate the high-level water modeling analysis completed by City staff.

Fielding Road/Duhamel Road

The City of Greater Sudbury completed a high-level water modeling analysis using estimated gross development areas of undeveloped properties within the industrial area, as well as an assumption of max flow pressure of 40psi and fire flow pressure at 20psi during max daily demand to estimate the future requirements for the water system within the Fielding Road/Duhamel Road industrial area – assuming the remaining industrial lands develop over the next 15+ years.

FIELDING ROAD/DUHAMEL ROAD – SE INDUSTRIAL LANDS THEORETICAL WATER MODELLING							
Junction Point/Location	Alternative	Current (L/s)	In 5 Years	In 10 Years	In 15 Years	Future (L/s)	City Notes
Approx. 90m NE of Fielding and Industrial Road intersection	Max Flow (40psi)	717	715	717	717	710	750mm main.
	Fire Flow (20psi)	805	800	805	805	795	750mm main. Fire Flows are from the same location.
Location at T-intersection/90 turn on Duhamel)	Max Flow (40 psi)	107	107	107	102	98	300mm main.
	Fire Flow (20 psi)	131	131	131	127	124	150mm, 6m lateral. Minor Loss = 1.2, HW = 130
94 Mumford Road	Max Flow (40 psi)	133	133	133	129	124	300mm main.
	Fire Flow (20 psi)	155	155	155	152	148	150mm, 6m lateral. Minor Loss = 1.2 HW = 130
South end of Mumford Drive	Max Flow (40 psi)	76	76	76	74	72	200mm main.
	Fire Flow (20 psi)	95	95	95	93	91	150mm, 6m lateral. Minor Loss = 1.2 HW = 130
Notes: Water modelling shown above completed by City of Greater Sudbury for the purpose of indicating current conditions and possible future updates required to watermains.							

MAGILL STREET – NW INDUSTRIAL LANDS THEORETICAL WATER MODELLING							
Junction Point/Location	Alternative	Current (L/s)	In 5 Years	In 10 Years	In 15 Years	Future (L/s)	City Notes
Magill Street and Walden	Max Flow (40 psi)	633	630	626	620	580	200/300 main
Sample Station Access Road	Fire Flow (20 psi)	306	306	306	303	297	150mm, 6m lateral. Minor Loss = 1.2, HW = 130

Approx. 300m east of Columbus Court and Magill Street	Max Flow (40 psi)	105	105	105	102	98	300mm main.
	Fire Flow (20 psi)	129	129	128	126	122	150mm, 6m lateral. Minor Loss = 1.2 HW = 130
Approx. 300m northeast of Magill Street Pumping Station	Max Flow (40 psi)	129	129	128	127	123	200mm main.
	Fire Flow (20 psi)	152	152	152	151	147	150mm, 6m lateral. Minor Loss = 1.2 HW = 130
<i>Notes: Water modelling shown above completed by City of Greater Sudbury for the purpose of indicating current conditions and possible future updates required to watermains.</i>							

Lasalle/Elisabella

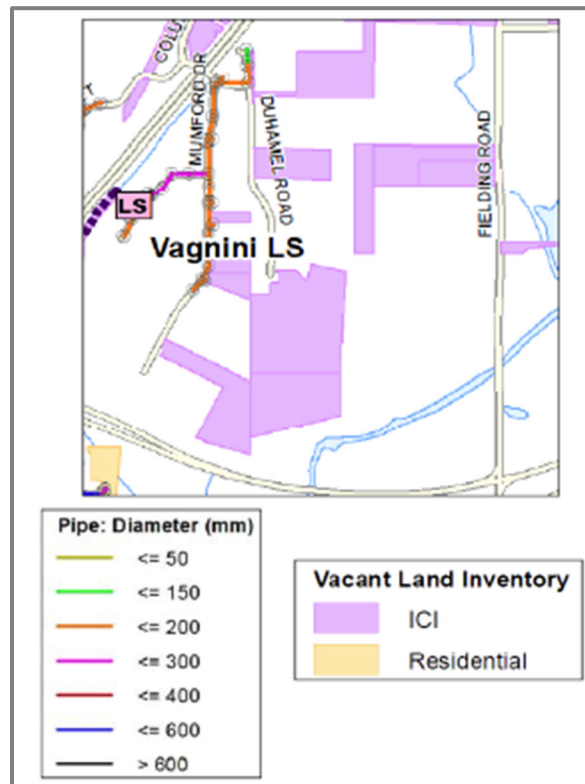
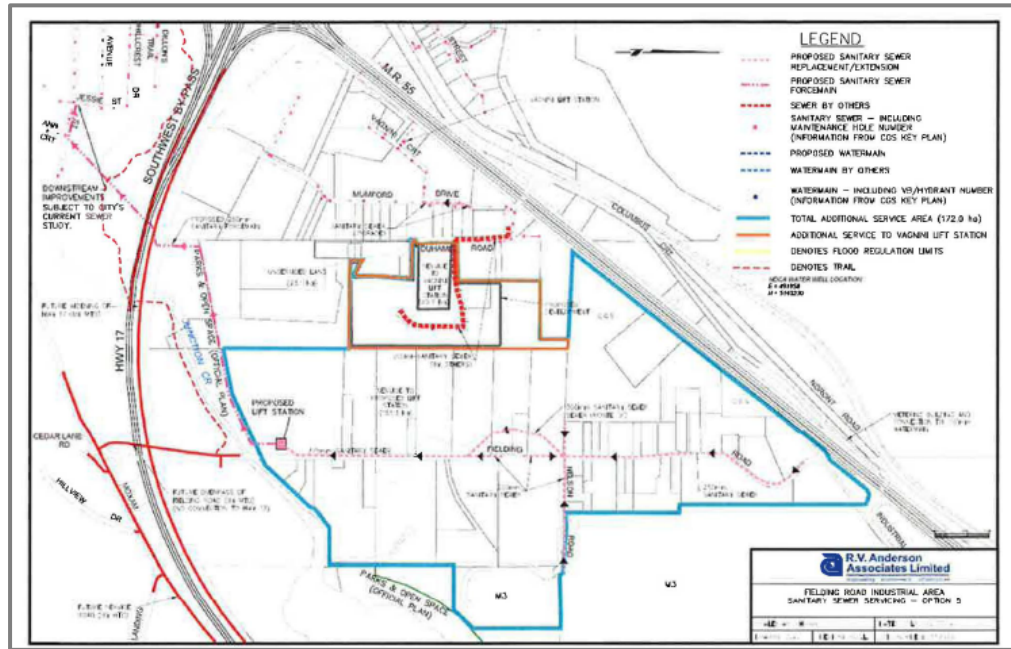
The City of Greater Sudbury completed a high-level water modeling analysis using estimated gross development areas of undeveloped properties within the industrial area as well as an assumption of max flow pressure of 40psi and fire flow pressure at 20psi during max daily demand to estimate the future requirements for the water system within the Lasalle/Elisabella area if the remaining industrial lands develop over the next 15+ years. This area is also known to the City for water supply issues as well as breakages within the watermains. Under the future scenarios, the current City modeler estimated the flows and tried to rectify the existing issues.

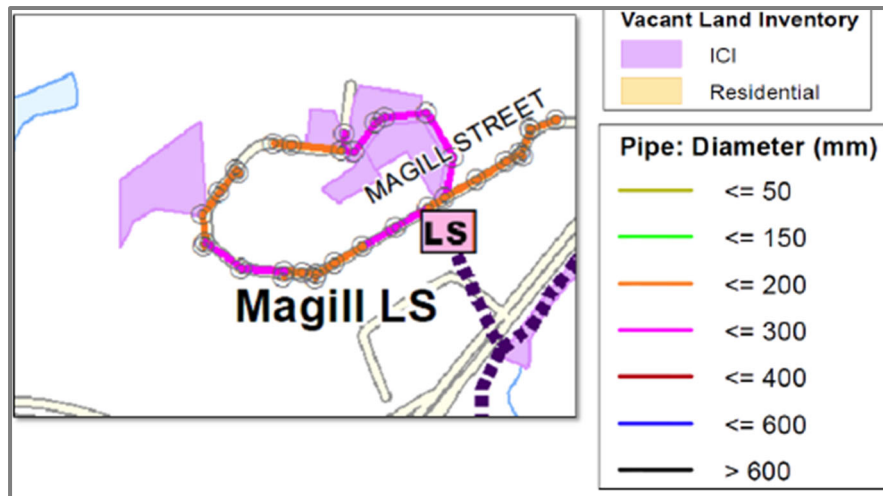
LASALLE/ELISABELLA THEORETICAL WATER MODELLING							
Junction Point/Location	Alternative	Current (L/s)	In 5 Years	In 10 Years	In 15 Years	Future (L/s)	City Notes
South end of Lapointe Street	Max Flow (40 psi)	33	33	32	30	4 (at 20 psi)	300mm main.
	Fire Flow (20 psi)	42	42	42	40	4	150mm, 6m lateral. Minor Loss = 1.2, HW = 130
Elisabella/Lapointe Street intersection	Max Flow (40psi)	33	33	32	31	5 (at 20 psi)	200/300mm main. Main is in poor condition.
	Fire Flow (20psi)	42	42	42	40	5	150mm, 6m lateral. Minor Loss = 1.2, HW = 130
Approximately 120m south of Lasalle Boulevard	Max Flow (40 psi)	49	49	49	45	8	200mm main.
	Fire Flow (20 psi)	62	62	62	58	21	150mm, 6m lateral. Minor Loss = 1.2, HW = 130
<i>Notes: Water modelling shown above completed by City of Greater Sudbury for the purpose of indicating current conditions and possible future updates required to watermains.</i>							

Wastewater Services Review

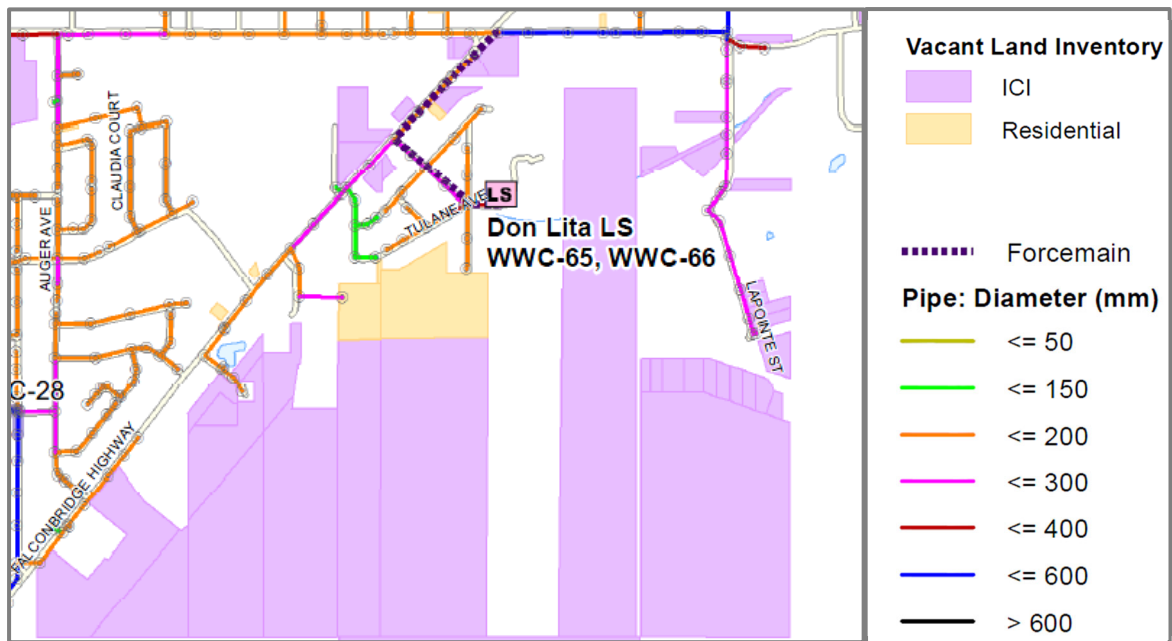
Water Servicing

Fielding Road/Duhamel Road

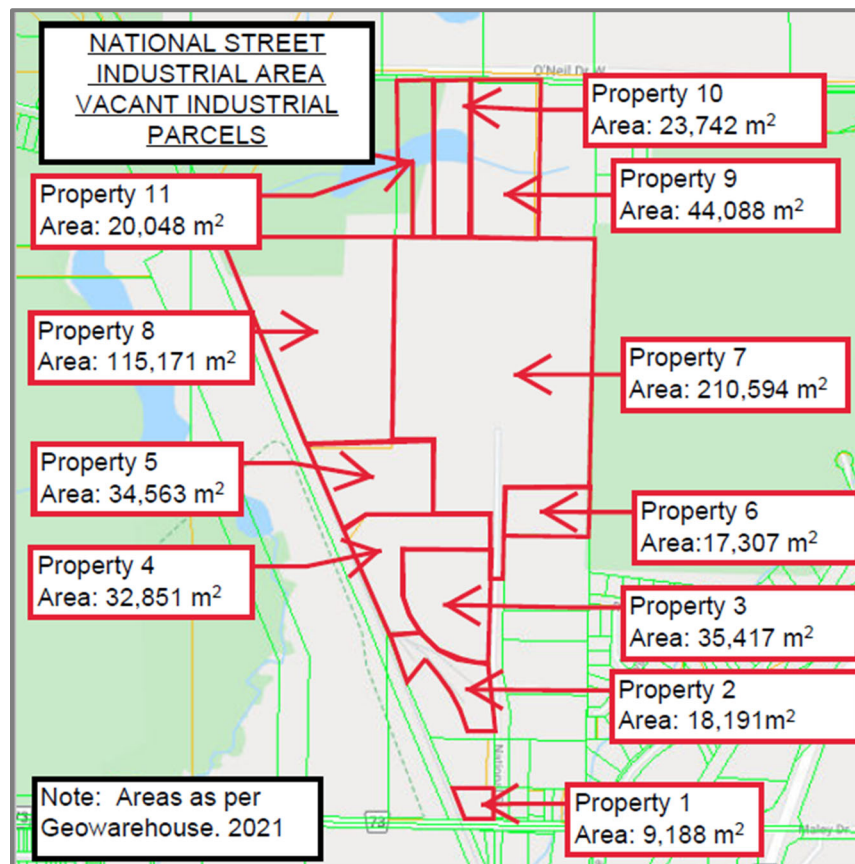
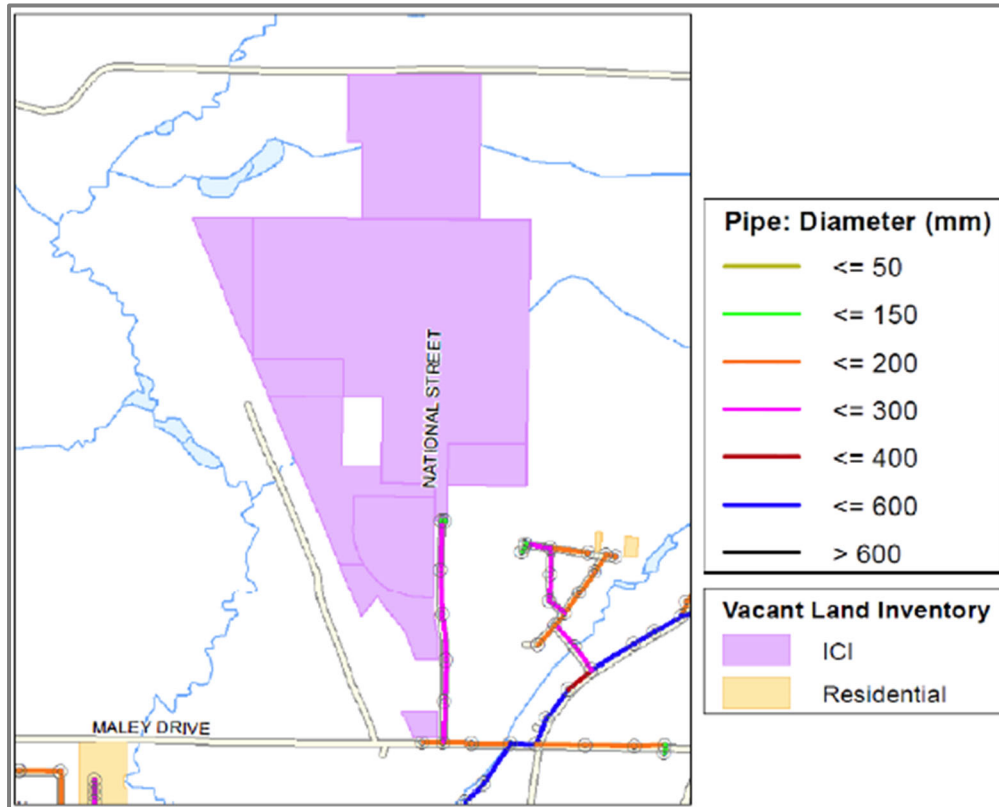




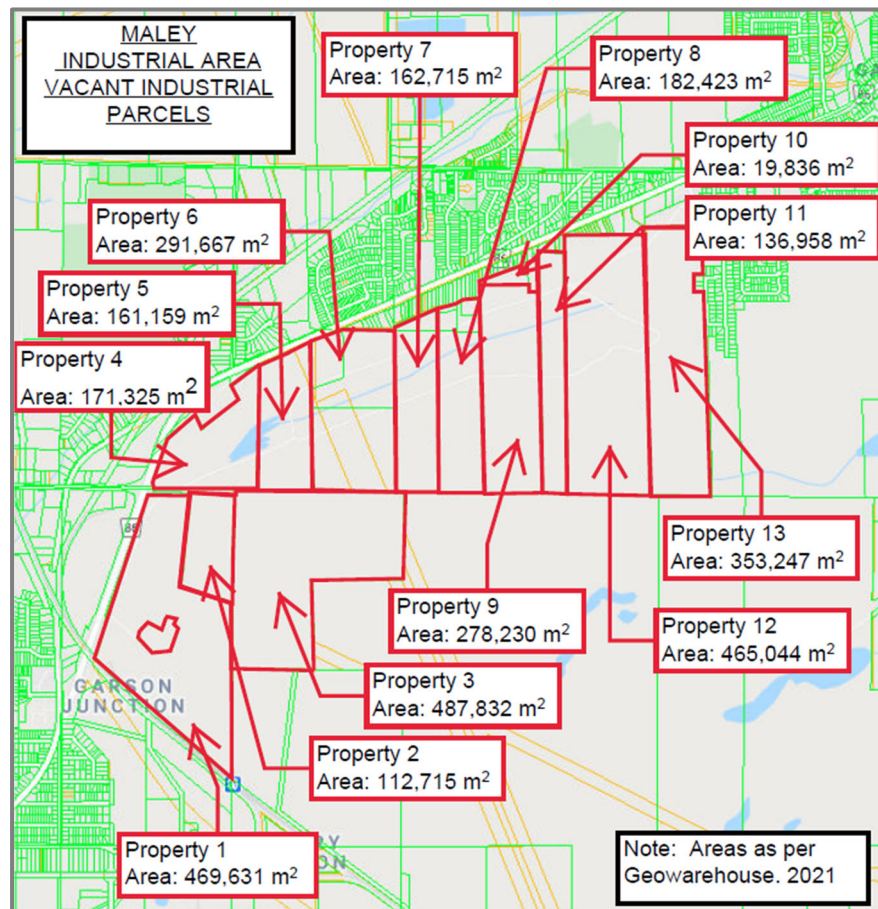
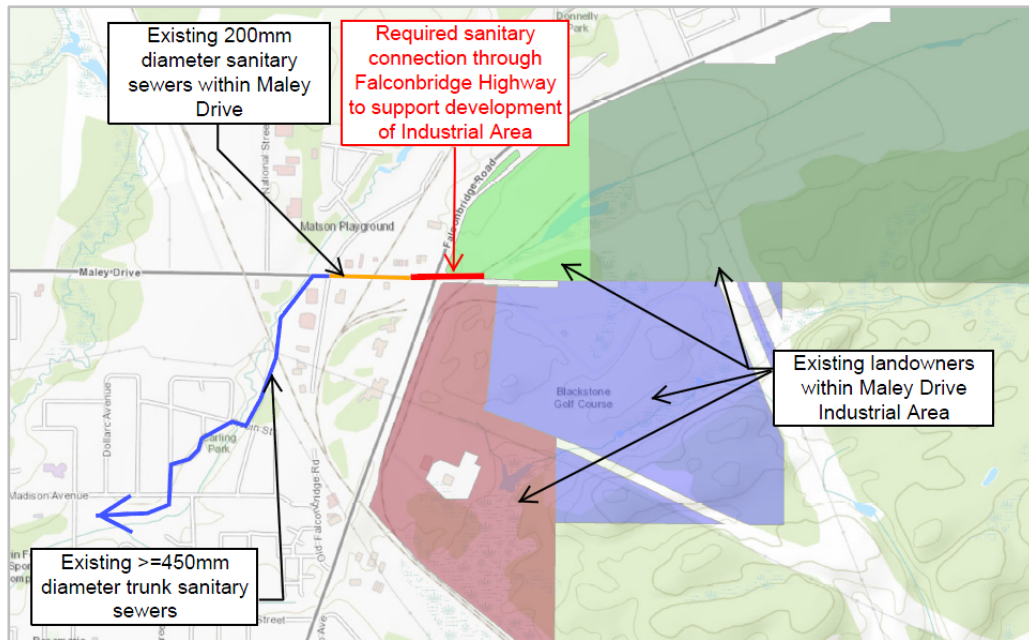
Lasalle/Elisabella



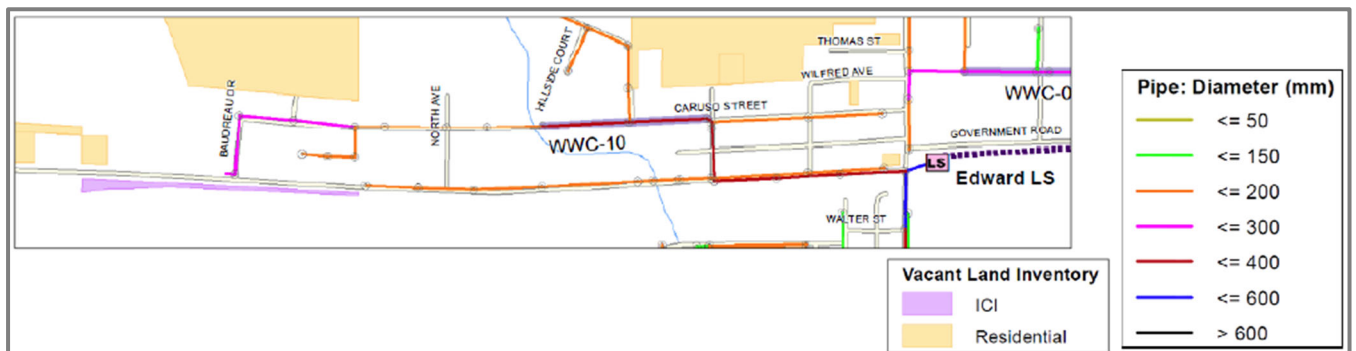
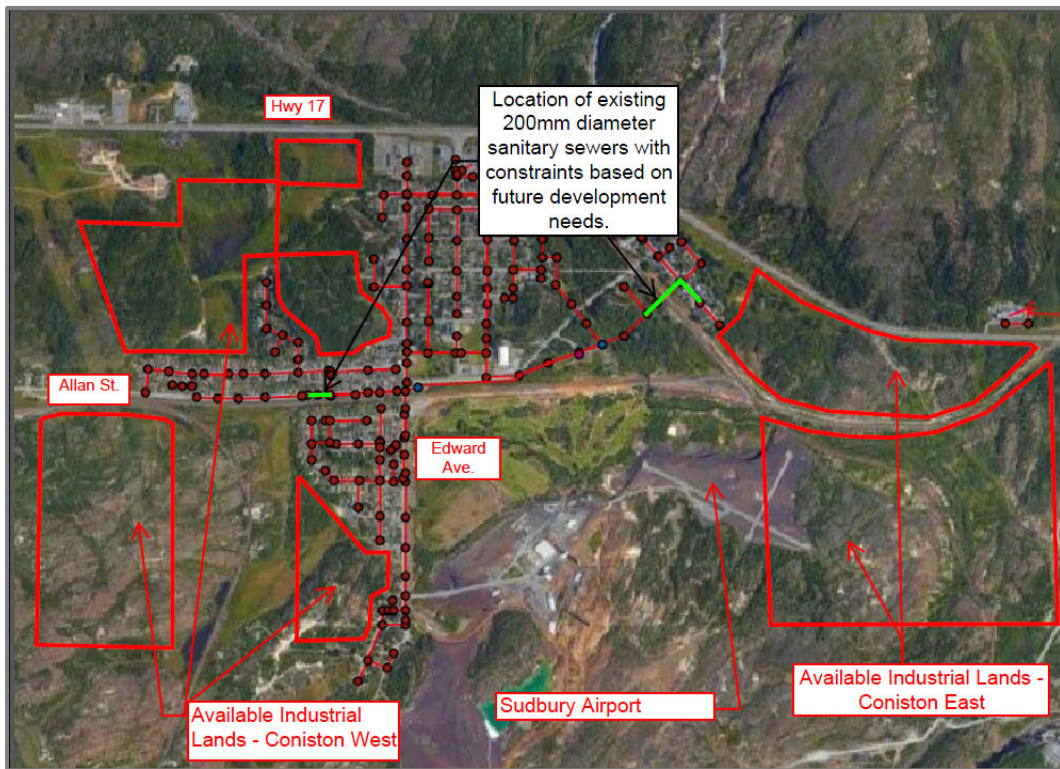
National Street

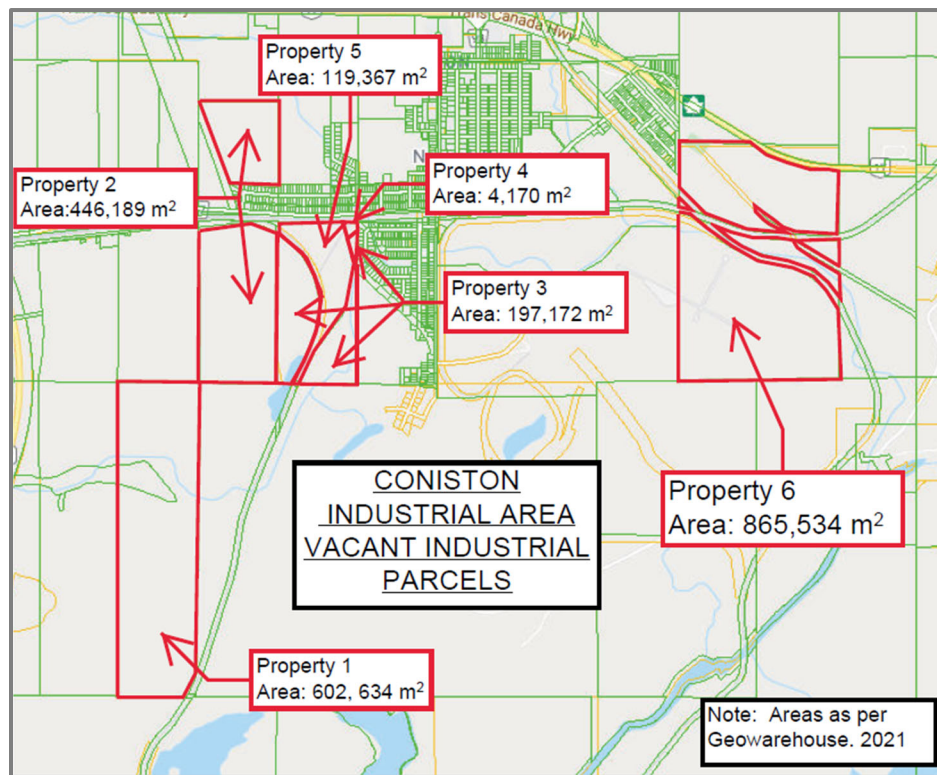
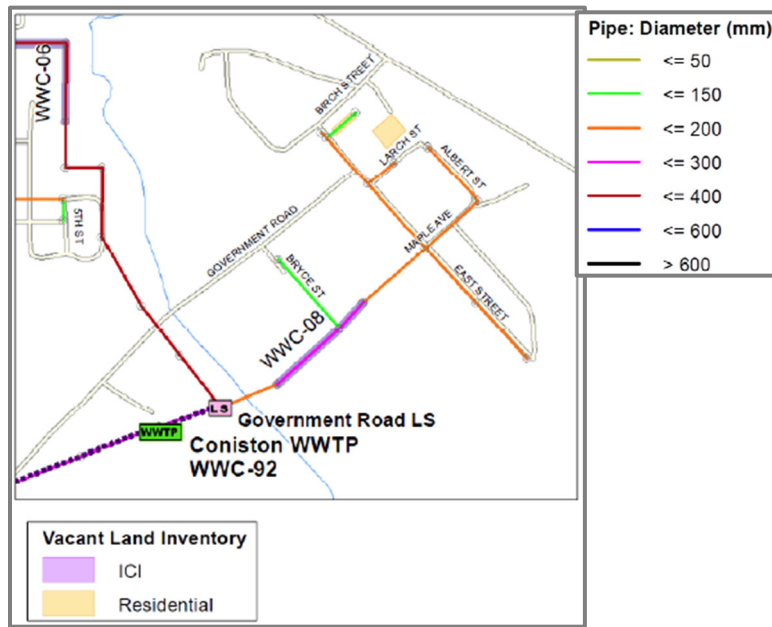


Maley Drive

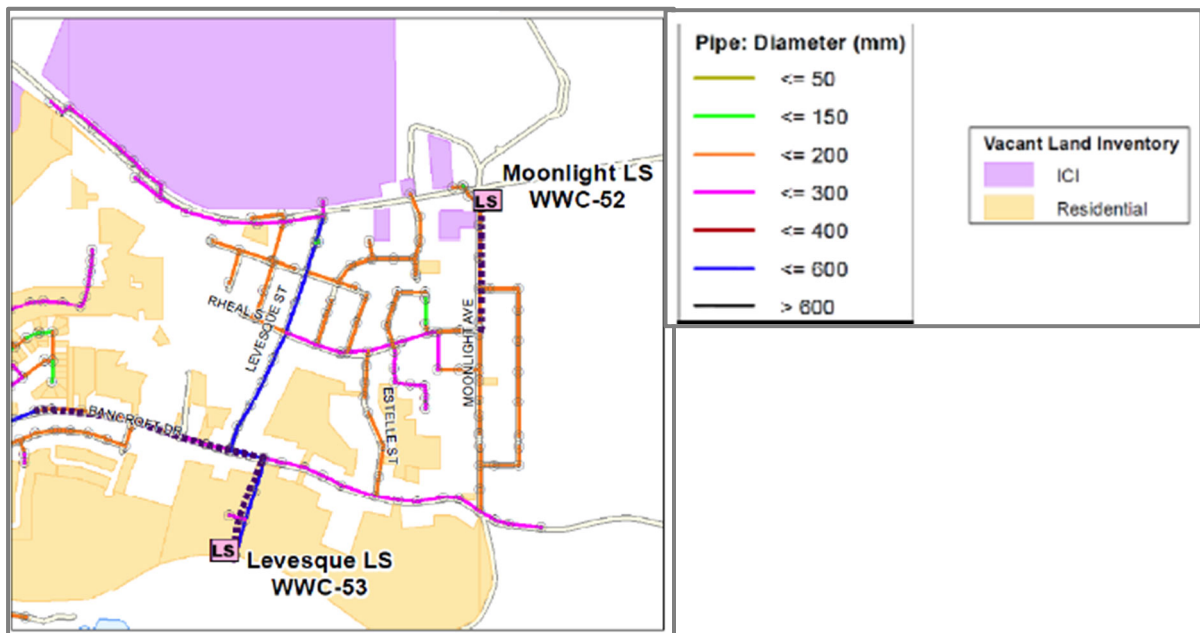
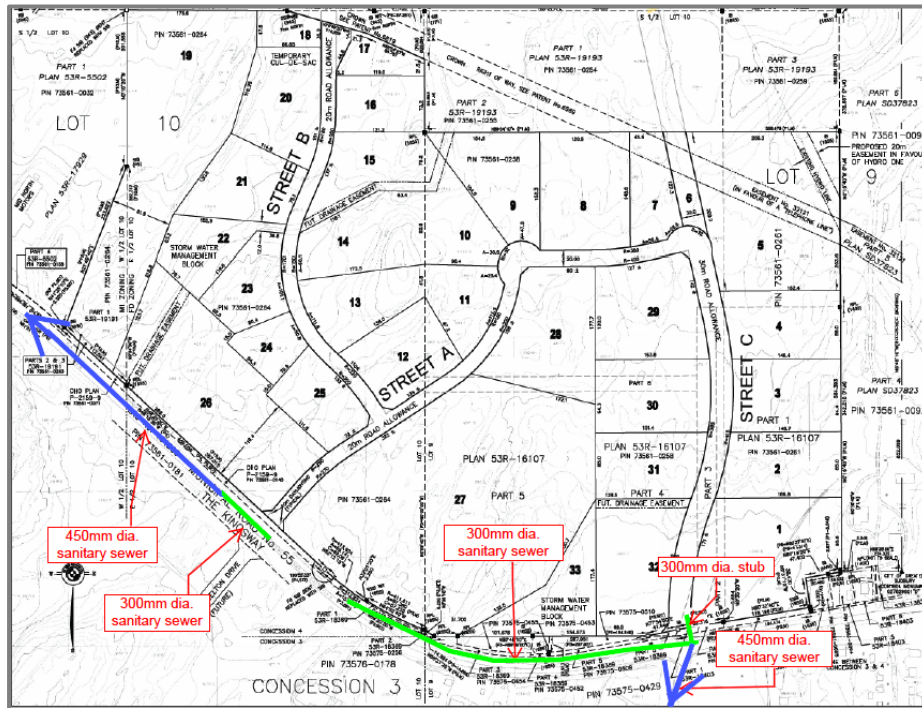


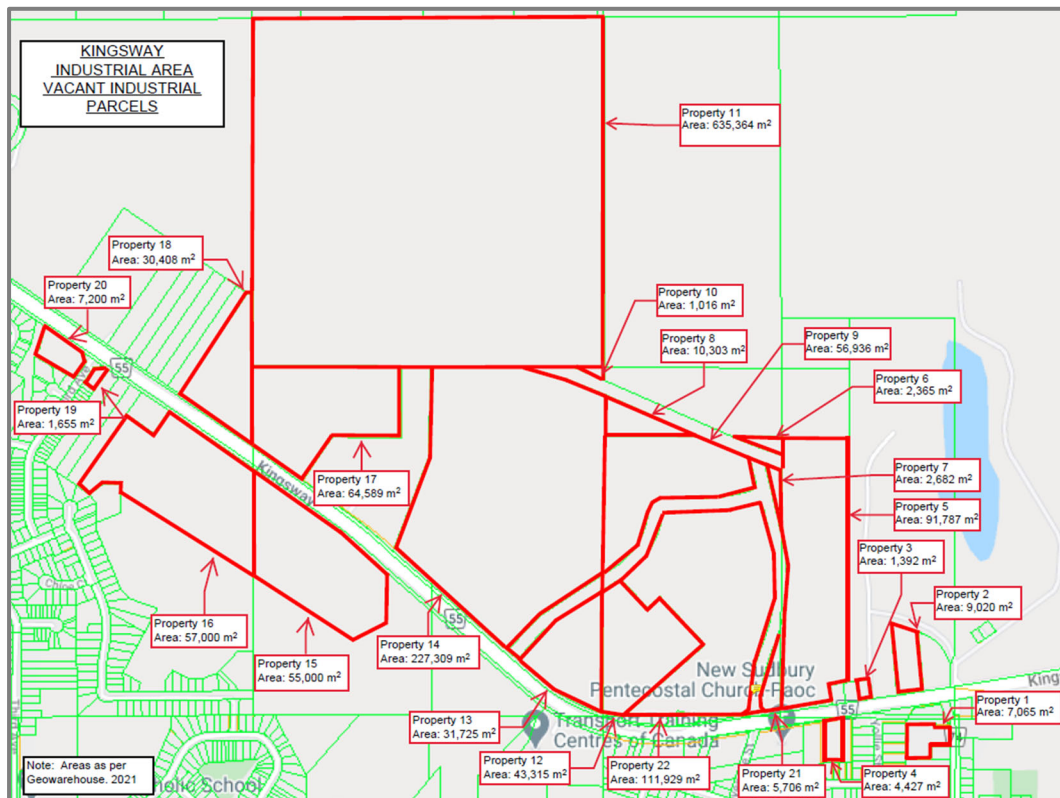
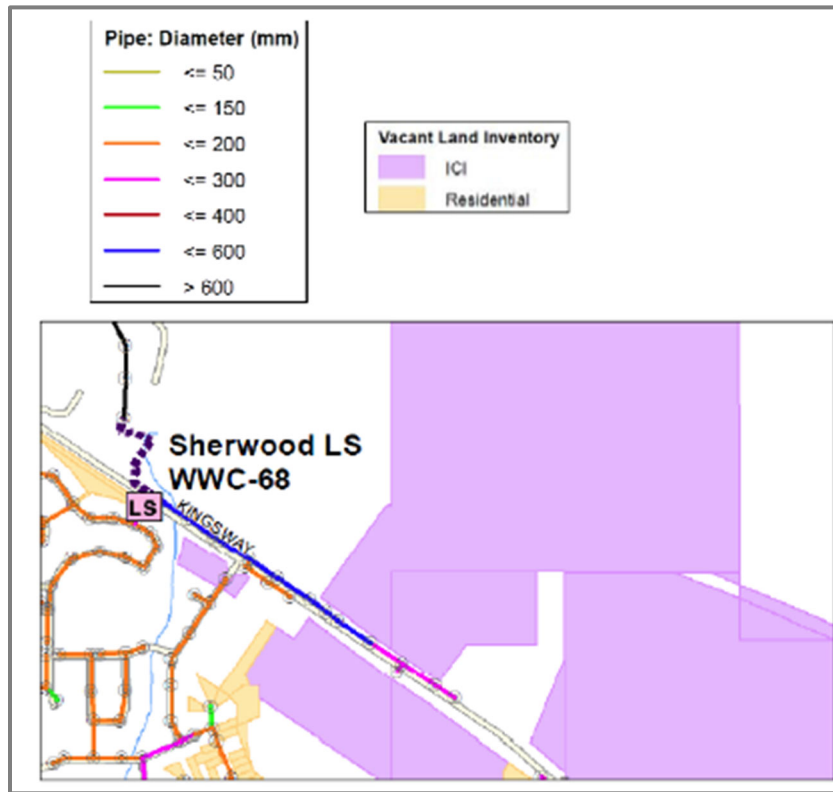
Coniston



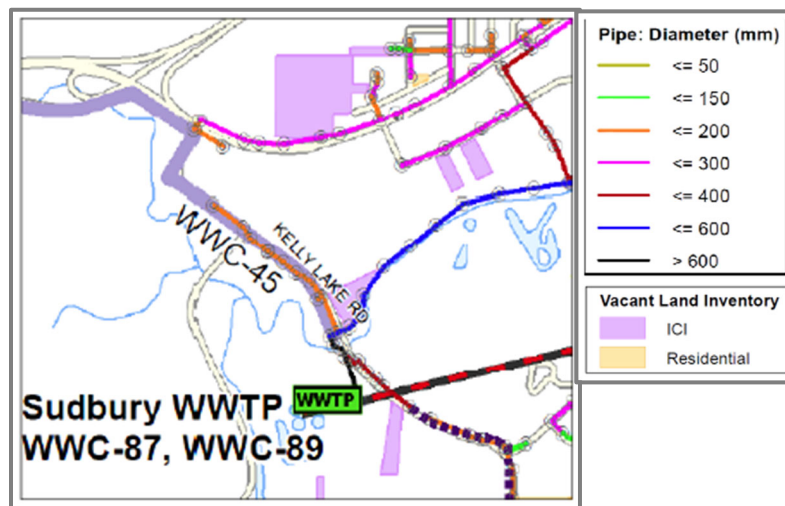
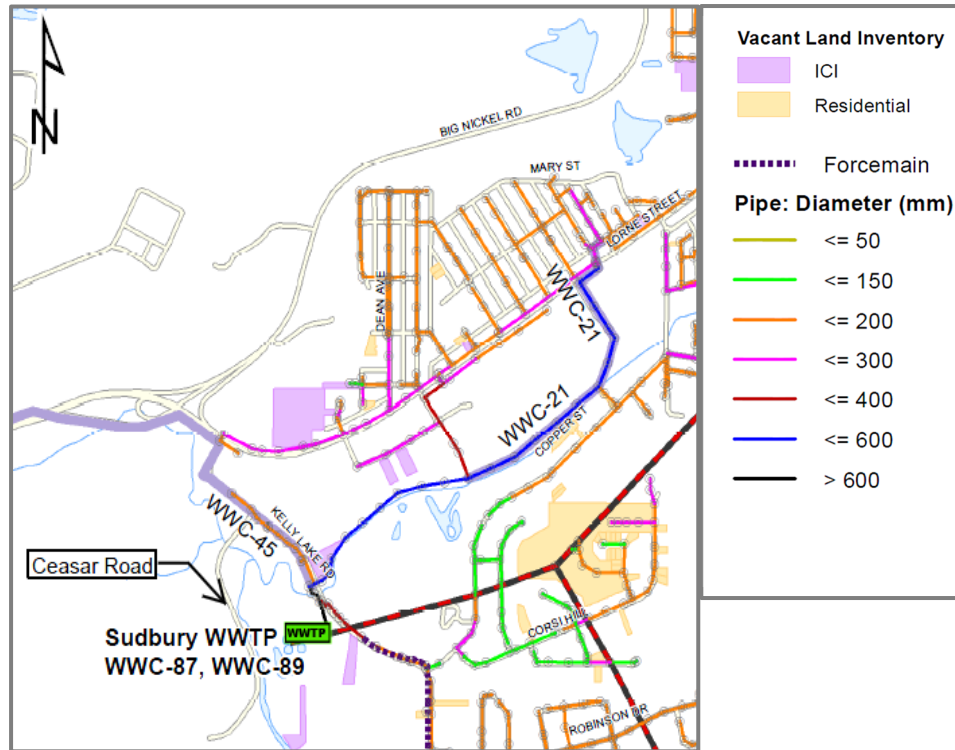


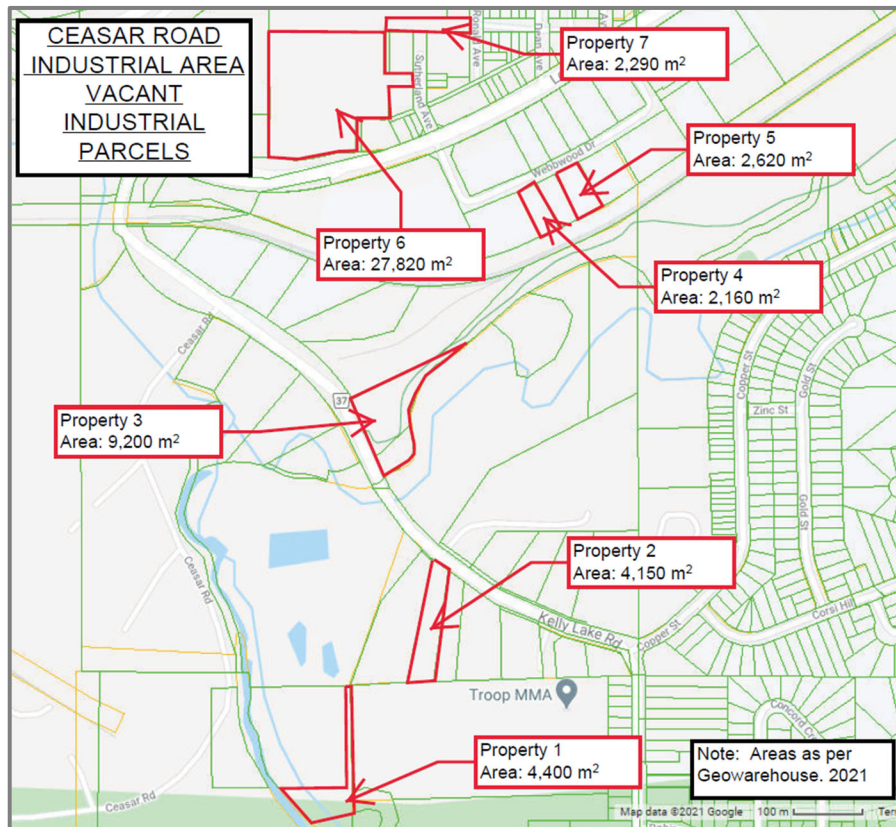
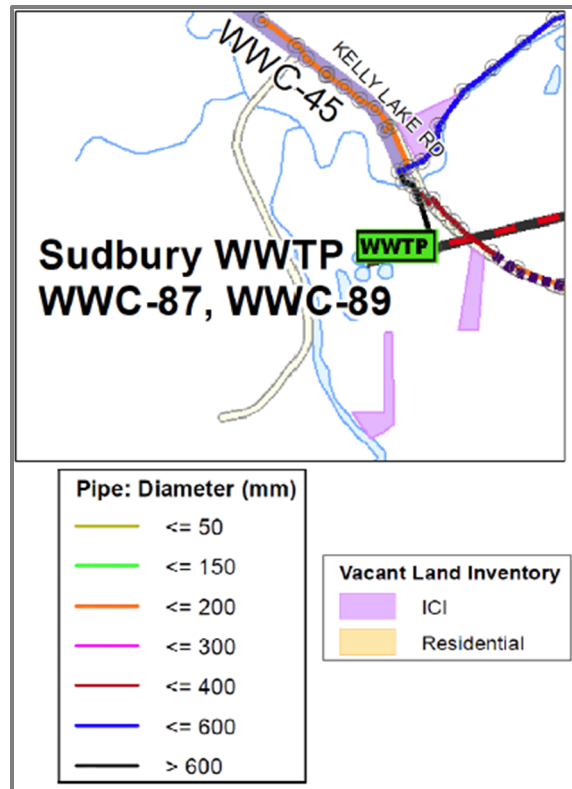
Kingsway



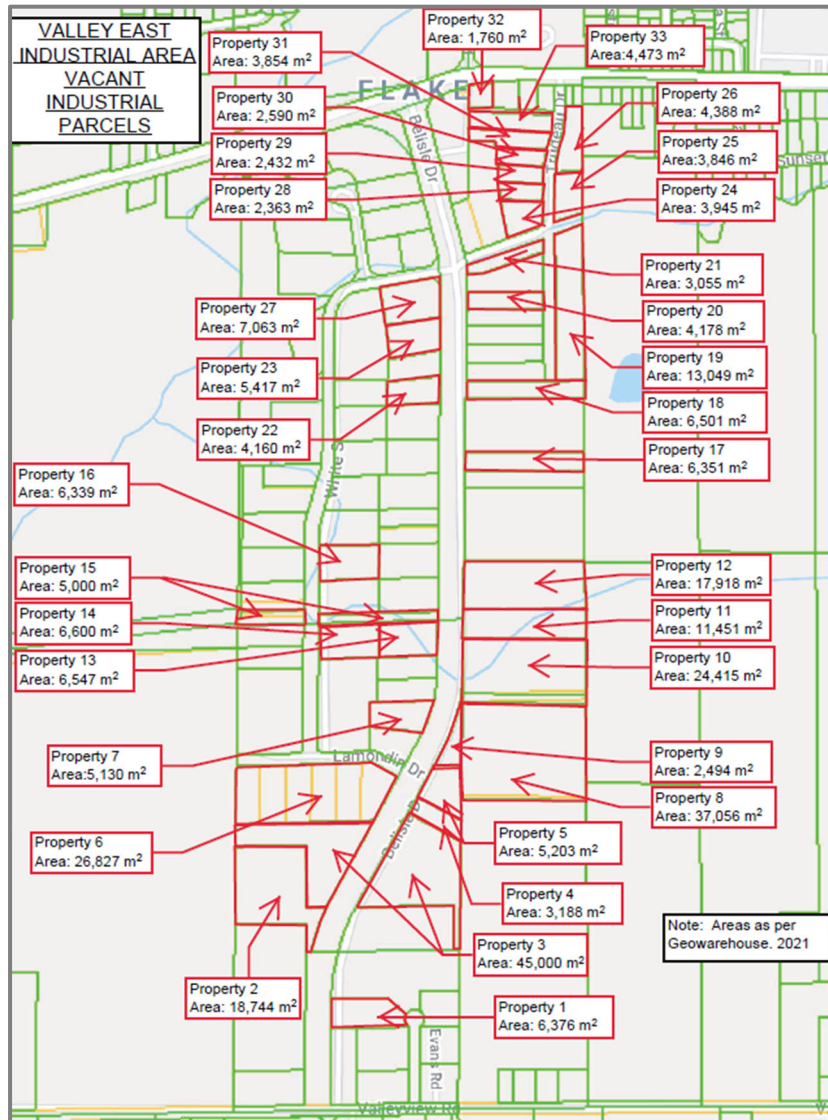
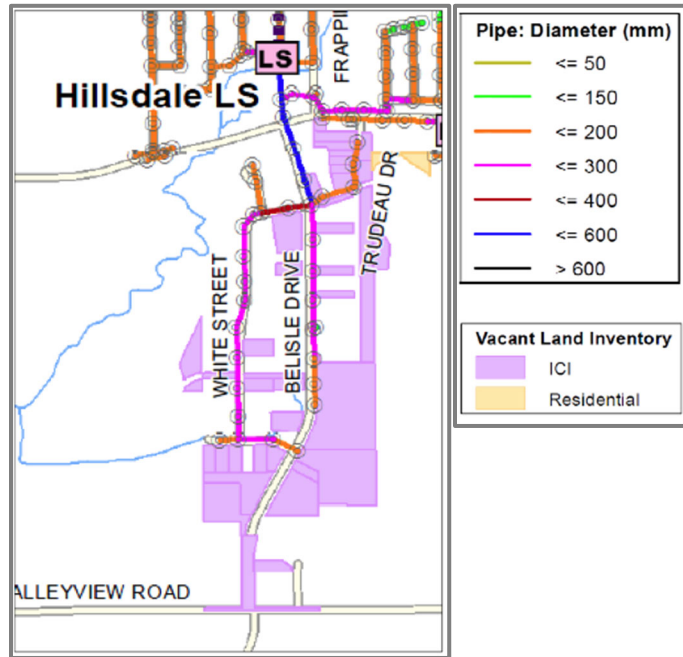


Ceasar Road





Valley East



Wastewater Modeling

The exhibits below illustrate the wastewater modeling analysis completed by City staff.

Fielding Road/Duhamel Road

A summary of the sanitary sewer capacity and anticipated future capacities within the existing 300mm diameter sanitary sewer on Magill Street (last sewer prior to lift station) is below.

MAGILL STREET SANITARY SEWER RESIDUAL CAPACITIES							
Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
WAT-03-0065	WAT-03-03-0021	WAT-03-03-0020	77.90	77.90	77.90	75.64	75.64
Note: The scenarios includes allowance for infiltration from 2-year storm.							

The City's theoretical modeling for the potential industrial area south of Highway 55 (capacity within the existing sanitary sewers on Mumford Drive and Duhamel Road) is below.

MUMFORD DRIVE/DUAMEL ROAD SANITARY SEWER RESIDUAL CAPACITIES							
Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
WAT-03-0019	WAT-03-03-0045	WAT-03-03-0044	80.14	80.14	80.14	75.31	75.32
Note: The scenarios includes allowance for infiltration from 2-year storm.							

National Street

A summary of the sanitary sewer capacity and anticipated future capacities within the existing sanitary sewers on National Street (just prior to Maley Street Drive sanitary connection) is below.

NATIONAL STREET SANITARY SEWER RESIDUAL CAPACITIES							
Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
WAT-03-0065	GAR-09-09-001	NEE-01-05-0587	0.00	0.00	0.00	0.00	0.00
Note: The scenarios includes allowance for infiltration from 2-year storm.							

Coniston

A summary of the sanitary sewer capacity and anticipated future capacities within the existing 200mm diameter sanitary sewer on Allan Street (last sewer leg prior to entering Edward Avenue Lift Station) as well as the existing 200mm diameter sanitary sewer just south of Government Road (last sewer leg prior to entering Government Road Lift Station) is below.

CONISTON INDUSTRIAL AREA – ALLAN STREET SANITARY SEWER RESIDUAL CAPACITIES

Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
NEE-07-0046	NEE-07-07-0039	NEE-07-07-0042	25.14	25.10	25.04	24.97	23.11

Note: The scenarios includes allowance for infiltration from 2-year storm.

CONISTON INDUSTRIAL AREA – SOUTH OF GOVERNMENT ROAD SANITARY SEWER RESIDUAL CAPACITIES

Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
NEE-08-0057	NEE-08-08-0048	NEE-08-08-0047	8.11	8.10	8.10	8.10	-3.59

Note: The scenarios includes allowance for infiltration from 2-year storm.

Kingsway

A summary of the sanitary sewer capacity and anticipated future capacities within the existing sanitary sewers on Kingsway west (last sewer leg prior to entering Sherwood Lift Station (LS)), and Kingsway centre (prior to entering Levesque Lift Station (LS)) is provided below.

KINGSWAY INDUSTRIAL AREA – KINGSWAY WEST SANITARY SEWER RESIDUAL CAPACITIES

Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
NEE-05-0124	NEE-05-11-0198	NEE-05-11-0050A	58.56	58.56	32.38	32.19	30.05

Note: The scenarios includes allowance for infiltration from 2-year storm.

The City's current residual capacity and future theoretical modeling for the existing sanitary sewers within Kingsway east and south to the Levesque Lift Station is illustrated below.

KINGSWAY INDUSTRIAL AREA – KINGSWAY CENTRE SANITARY SEWER RESIDUAL CAPACITIES

Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
NEE-06-0075	NEE-06-12-0084	NEE-06-12-0086	238.38	271.17	271.10	103.33	103.33

Note: The scenarios includes allowance for infiltration from 2-year storm.

Cesar Road

A summary of the sanitary sewer capacity and anticipated future capacities within the existing sanitary sewers on Kelly Lake Road north of the WWTP (last sewer leg prior to entering 1,350mm trunk sanitary) as well as the existing sanitary sewers on Kelly Lake Road south of the WWTP (last sewer leg prior to entering 1,350mm trunk sanitary) is below.

CEASAR ROAD INDUSTRIAL AREA – KELLY LAKE ROAD NORTH OF WWTP SANITARY SEWER RESIDUAL CAPACITIES

Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
MCK-10-0238	MCK-10-14-0037	MCK-10-14-0048	733.05	733.05	733.05	731.62	731.34

Note: The scenarios includes allowance for infiltration from 2-year storm.

CEASAR ROAD INDUSTRIAL AREA – KELLY LAKE ROAD SOUTH OF WWTP SANITARY SEWER RESIDUAL CAPACITIES

Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
637789	MCK-10-14-0049	MCK-10-14-0048	219.01	219.01	219.01	218.85	218.16

Note: The scenarios includes allowance for infiltration from 2-year storm.

Valley East

A summary of the sanitary sewer capacity and anticipated future capacities within the existing sanitary sewers on Belisle Drive (last sewer leg prior to entering Hillsdale Lift Station) is below.

VALLEY EAST INDUSTRIAL AREA SANITARY RESIDUAL CAPACITIES

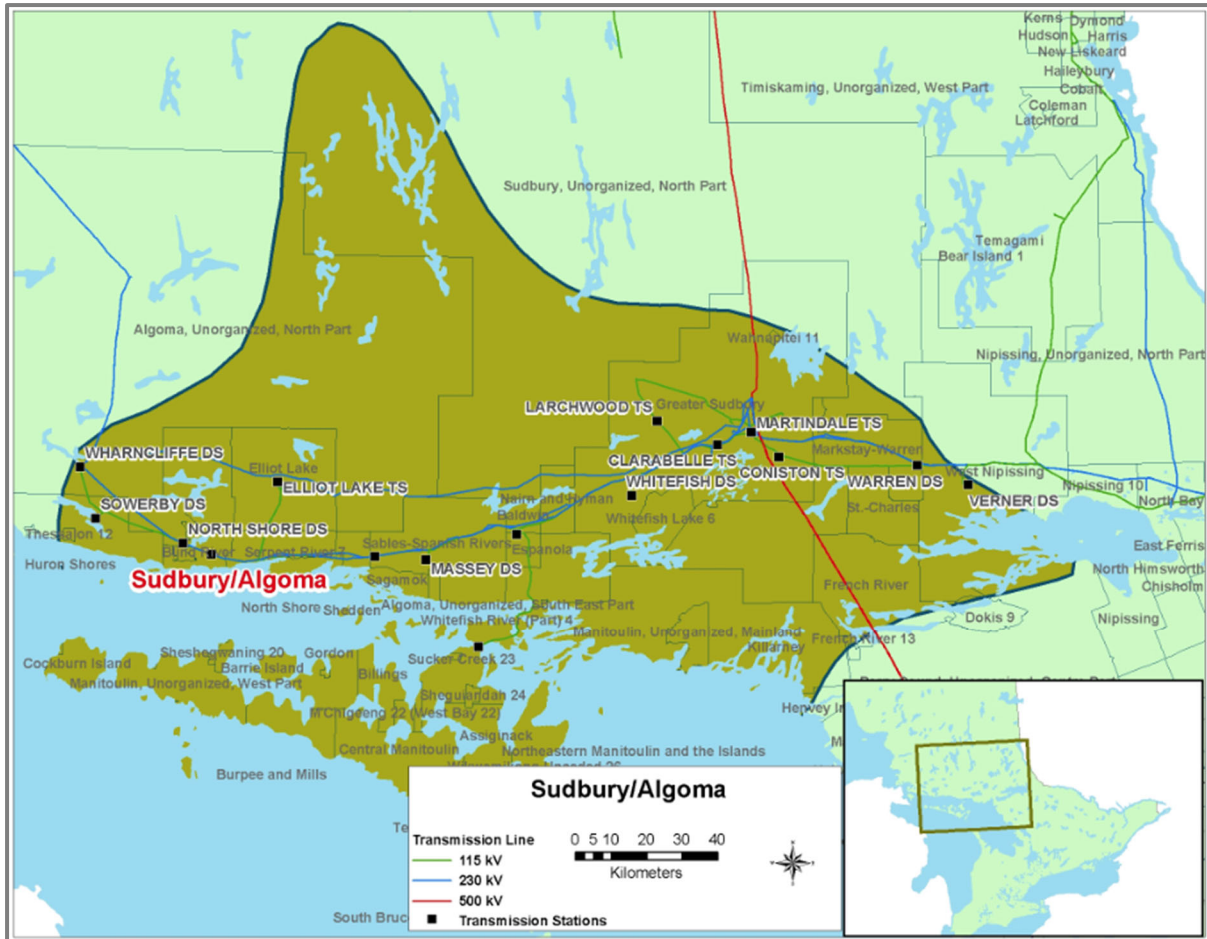
Sewer Label	Upstream Node	Downstream Node	Current Residual Capacity (l/s) 2021	Future Residual Capacity (l/s) 2026	Future Residual Capacity (l/s) 2031	Future Residual Capacity (l/s) 2036	Future Residual Capacity (l/s) Beyond 2036
BLE-02-0193	BLE-02-02-0198	BLE-02-02-197	50.54	50.54	50.54	43.33	39.02

Note: The scenarios includes allowance for infiltration from 2-year storm.

Utilities Review – Electrical

Introduction

The image below illustrates Hydro One's service area for Sudbury/Algoma (source: Hydro One). At the request of SCS Consulting Group on behalf of the City of Greater Sudbury, Hydro One prepared a report entitled *High Level Connections Options and Capacity Assessment* for inclusion within this Employment Land Strategy. This report is attached.



The following offers a summary of each industrial area, as provided by Hydro One.

Fielding Road/Duhamel Road Industrial Area

The Fielding Road/Duhamel Road industrial area is located between Regional Road 55 and Highway 17. As per Hydro One, there are two 230kV circuits and one 115kV circuit in the vicinity of the industrial area. Assuming similar loading is required for the future industrial areas, the two 230kV circuits have sufficient capacity available to supply an additional 20MW of load. Hydro One has concerns regarding new load capacity within the 115kV circuit.

Lasalle/Elisabella Industrial Area

The Lasalle/Elisabella industrial area is located east of Falconbridge Highway and south of Lasalle Boulevard within Sudbury. As per Hydro One, the connection option for this area is circuit L1S which is a 115kV circuit running between the Martindale TS and Crystal Falls TS. This circuit is lightly loaded, and capacity exists to supply additional load.

National Street Industrial Area

The National Street industrial area is located north of Maley Drive on National Street, within the Township of Garson. Hydro One has indicated that the best candidate for a connection supporting the National Street industrial area would be circuit L1S (as noted above for the Lasalle/Elisabella industrial area).

Maley Drive Industrial Area

The Maley Drive industrial area is located east of Falconbridge Highway on Maley Drive, within the Township of Garson. Hydro One indicates that circuit H24S right-of-way runs through this area of interest. They suggest that a customer-owned station could be built to allow for electrical connections for this industrial area.

Coniston Industrial Area

The Coniston industrial area is located southeast of the Trans-Canada Highway and Kingsway intersection, in the Township of Neelon. Hydro One indicates that there is only one transmission connection option for this area, which is circuit L1S, as well as a requirement for a new customer-owned station.

Kingsway Industrial Area

The Kingsway industrial area is located east of Falconbridge Road on Kingsway, within the Township of Neelon. Similar to the Coniston area, the Kingsway area would be required to connect to circuit L1S via a new customer-owned station.

Ceasar Road Industrial Area

The Ceasar Road industrial area is located south of Big Nickel Road along Kelly Lake Road and Lorne Street, in the Township of McKim. As per Hydro One, there are two 230kV circuits and one 115kV circuit in the vicinity of the industrial area. Assuming similar loading is required for future industrial uses, the two 230kV circuits have sufficient capacity available to supply an additional 20MW of load. Hydro One has concerns regarding new load capacity within the 115kV circuit.

Valley East Industrial Area

The Valley East industrial area is located south of Main Street along Belisle Drive and White Street, within the Township of Val Caron. Hydro One indicates that there is only one transmission connection option for this area, which is circuit S5M, as well as a requirement for a new customer-owned station.

High Level Connections Options and Capacity Assessment

Prepared by: System Planning - Hydro One Tx

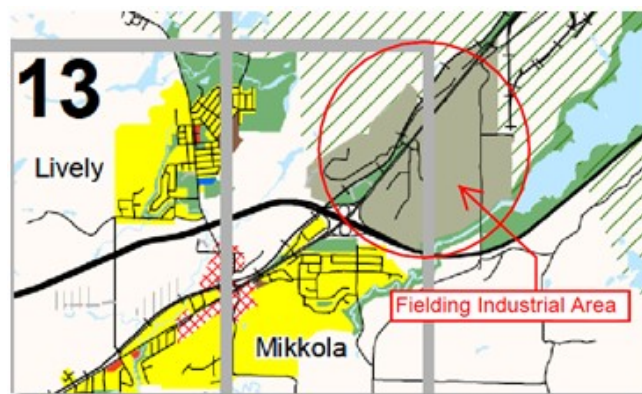
At the request of: City of Greater Sudbury

City of Greater Sudbury is looking into the potential for development of various industrial areas within the Greater Sudbury Area. The City has requested Hydro One to provide a high level available capacity assessment within the various areas of the city interest for the development of industrial facilities associated with requirement for any major upgrade and/or expansion. In the absence of more information regarding the size of the load to be connected, this assessment was conducted assuming a 20MW load at a 0.9 power factor. It is also assumed that the City of Greater Sudbury is to build a new transformer station to supply the new industrial development. All new tap segment lengths provided in this assessment are approximate. Further assessments will determine the actual feasible routing of these taps at a later stage of the connection assessment. Any electrical assessment conducted as part of this exercise is subject to change based on a formal SIA/CIA assessment. The present assessment does not constitute a formal assessment of available capacity.

Below are the findings for each area:

1. Fielding Road Industrial Area

This area is located west of Walden Industrial Park between Municipal Road 15 and Highway 17 in Lively.



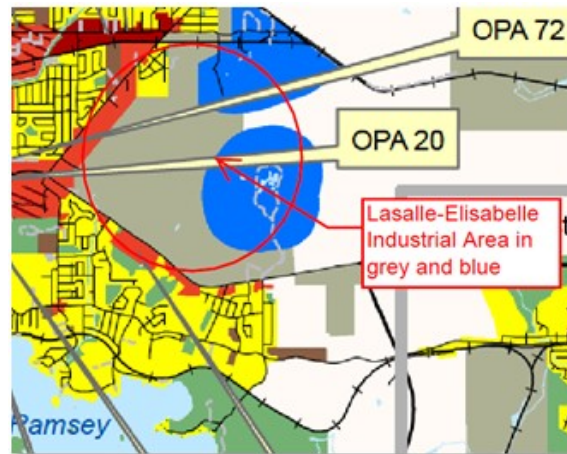
Two (2) 230kV circuits and one (1) 115kV circuit are in the vicinity of the area.

For a 230kV connection: The two 230kV circuits – Circuit S22A and Circuit X27A - share the same right of way. As such, the tap to supply the new load is approximately 7km long irrespective of which 230kV the new load is connected to. The 230kV circuit, assuming today's system configuration, loading and planned projects in the foreseeable planning horizon, have sufficient available capacity to supply an additional 20MW of load.

For an 115kV connection: The nearby circuit is circuit S2B. Capacity concerns exist on this particular circuit. New industrial load connections are being currently assessed for connection and will effectively use the remaining capacity on the line. In addition, it should be noted that the addition of 20MW on Circuit S2B will result in potential thermal overload on Martindale TS autotransformers under contingencies conditions occurring during an outage one of the autotransformer.

2. Lasalle Boulevard

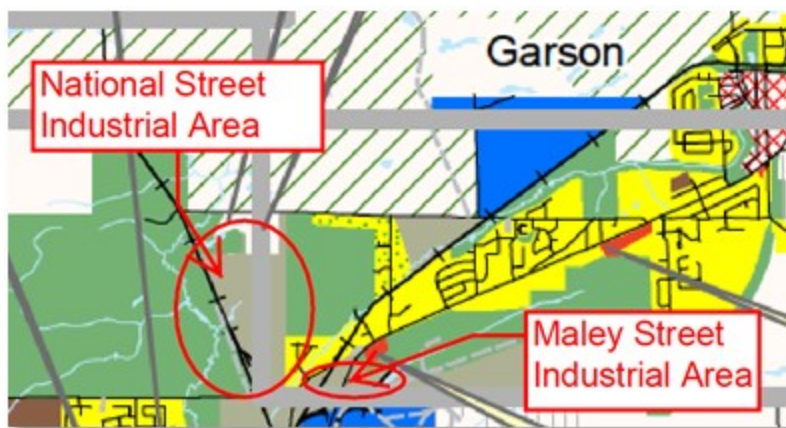
This area is located off of Falconbridge Road in the Lasalle Boulevard Area



The only connection option is onto circuit L1S. Circuit L1S is an 115kV circuit running between Martindale TS and Crystal Falls TS. Circuit L1S is a relatively lightly loaded circuit and enough capacity exists on the line to supply an additional 20MW of load. The connection to the new 20MW customer owned station will require the construction of a tap that is less than 1km long.

3. National Street

This area is located at the intersection of Maley Drive and National Street.



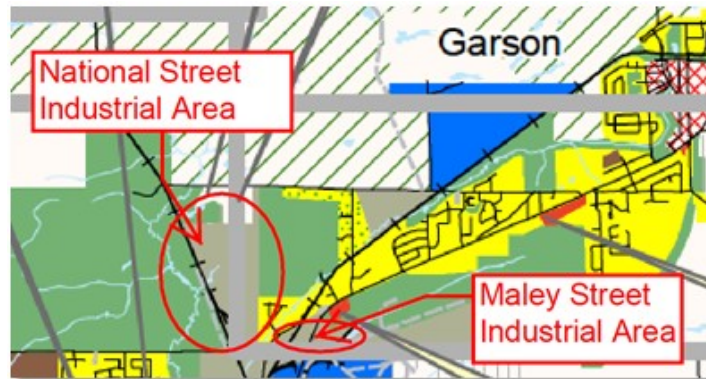
This area is located near Martindale TS. Various connection alternatives are possible. A direct low voltage connection could be considered here. However, Martindale TS DESN currently has a limited available capacity. 20MW of additional load will trigger a need for additional capacity at the station.

For an 115kV connection, candidate circuits are circuit S6F, circuit S5M and circuit L1S. As stated above, adding 20MW on the radial system out of Martindale TS (circuit S6F and S5M in this case) will lead to thermal overload on the Martindale TS autotransformer during certain contingencies and outage conditions.

Circuit L1S would be the better candidate for connection as it is a network line running between Martindale TS and Crystal Falls. In addition of splitting the additional load between Martindale and Crystal Falls, connecting to this circuit comes with the dual source advantage that a network line offers.

4. Maley Drive Industrial Area

This area is located near the intersection of Maley drive and Falconbridge drive.

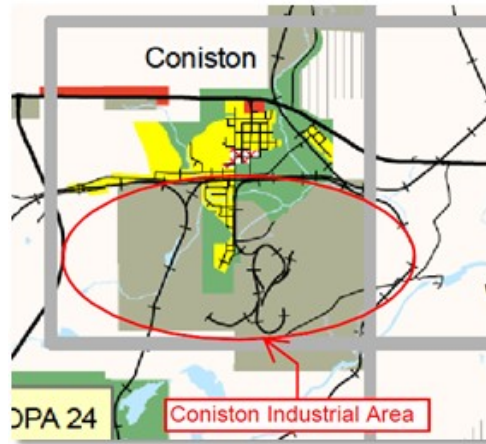


Circuit H24S right of way goes through the area of interest. Circuit H24S is a 230kV circuit tying Martindale TS to Otto Holden TS. Given geographical location of the circuit, the customer owned station could be built as such that it will minimize the length of the tap segment. The circuit has enough capacity to supply an additional 20MW of load.

Alternatively, a 1km long tap will be required to supply the new customer station, if the customer elects to supply the new load via an 115kV connection. The new load will be supplied via circuit L1S.

5. Coniston Industrial load

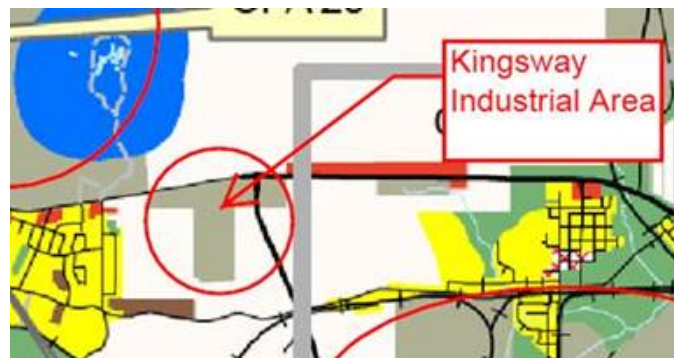
This area is Located south of the intersection of Allan Street and Edward Avenue South.



The only transmission connection alternative for this area is via circuit L1S. Supplying the new customer owned station will require the construction and a new 1km long 115kV tap. The line and affected transformer stations have enough capacity to supply an additional 20MW on L1S.

6. Kingsway Industrial Area

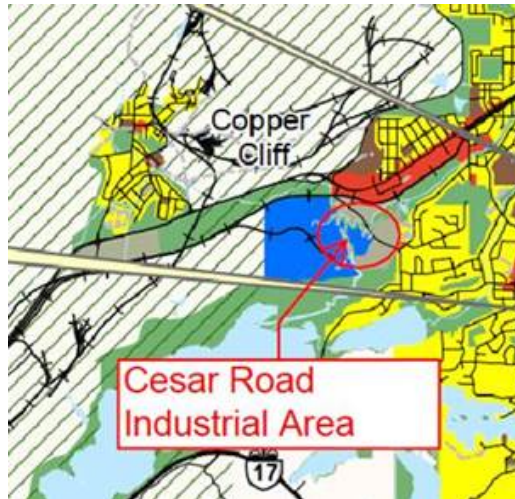
This area is located Kingsway East located west of Highway 17/Kingsway Intersection



The only transmission connection alternative for this area is via circuit L1S. Supplying the new customer owned station will require the construction and a new 2km long 115kV tap. The line and affected transformer stations have enough capacity to supply an additional 20MW on L1S.

7. Cesar Road Industrial Area

This area is located south of Kelly Lake Road in Sudbury



Two (2) 230kV circuits and one(1) 115kV circuit are in the vicinity of the area.

For a 230kV connection: The two 230kV circuits – Circuit S21N and Circuit X23N - share the same right of way. As such, the tap to supply the new load is approximately 3km long irrespective of which 230kV the new load is connected to. The 3km of length is assuming that the new load will be supplied by extending the tap line supplying an industrial customer in the area to the new customer own station. The 230kV circuit, assuming today's system configuration, loading and planned projects in the foreseeable planning horizon, have sufficient available capacity to supply an additional 20MW of load.

For an 115kV connection: The nearby circuit is circuit S2B. Capacity concerns exist on this particular circuit. New industrial load connections are being currently assessed for connection and will effectively use the remaining capacity on the line. In addition, it should be noted that the addition of 20MW on Circuit S2B could result in thermal overload on Martindale TS autotransformers under contingencies conditions occurring during an outage one of the autotransformer. The connection to circuit S2B will require the construction of a 7km long tap segment.

8. Valley East Industrial Area

This area is located south of Municipal Road 15 off of Belisle Drive.



The only transmission connection alternative for this area is via circuit S5M. Supplying the new customer owned station will require the construction and a new 2km long 115kV tap. Adding 20MW on circuit S5M - a radial circuit out of Martindale TS - will lead to thermal overload on the Martindale TS autotransformer during certain contingencies and outage conditions.

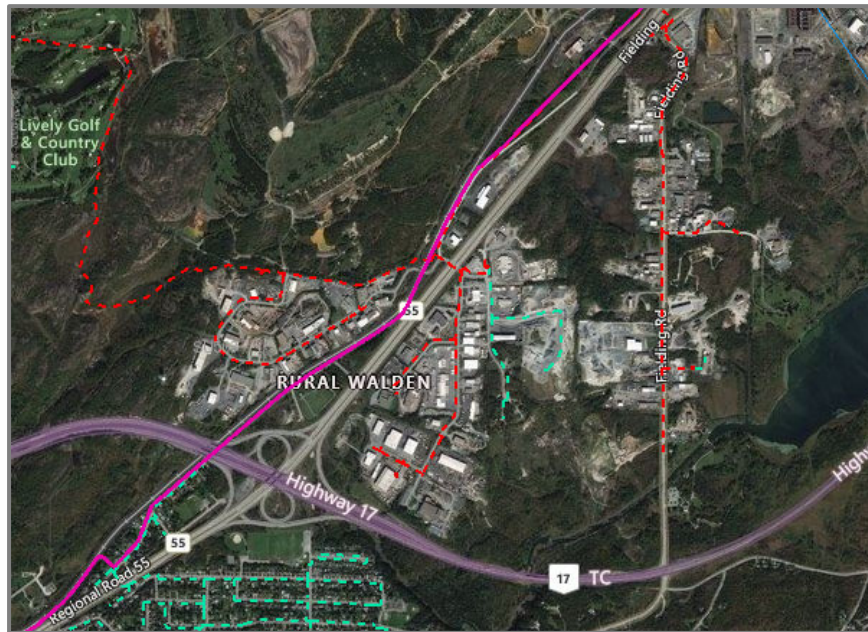
Utilities Review – Natural Gas

Introduction

The following offers a summary of each industrial area, as provided by Enbridge Gas Inc.

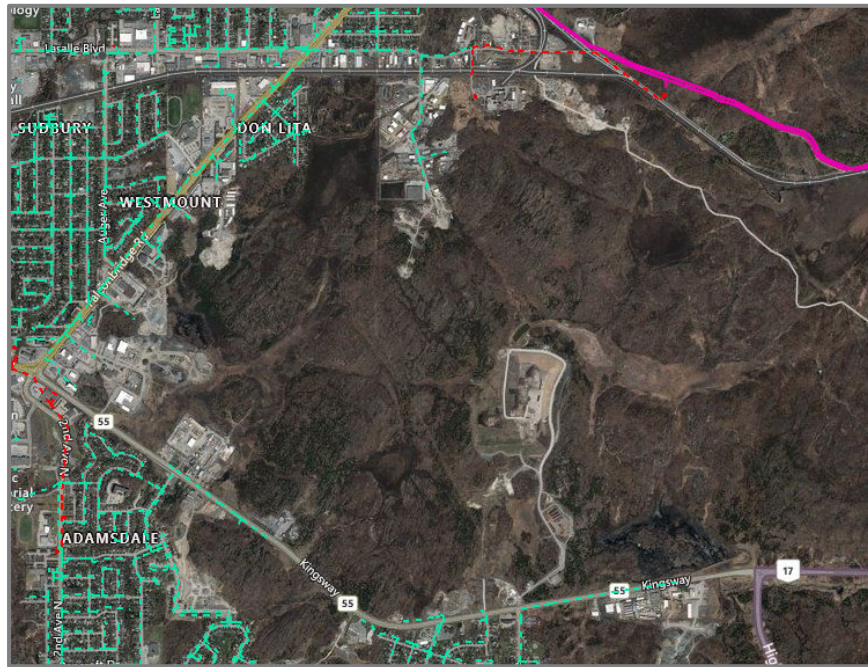
Fielding Road/Duhamel Road Industrial Area

The Fielding Road/Duhamel Road industrial area is located between Regional Road 55 and Highway 17. Enbridge Gas has confirmed that there is an existing 10" gas line (see solid pink line on exhibit below) within Regional Road 55, rated for a maximum operating pressure of 3,450 kPa that could support higher pressure future industrial applications. There are also 4" lines (see dashed red lines below) with a maximum operating pressure of 1,900 kPa that could support commercial or light industrial applications and 2" lines (see dashed teal lines below) rated for a maximum operating pressure of 420 kPa that could support space heating applications. All lines are subject to detailed review and capacity analysis based on future specific development applications.



Lasalle/Elisabella Industrial Area

The Lasalle/Elisabella industrial area is located east of Falconbridge Highway and south of Lasalle Boulevard within Sudbury. Enbridge Gas has confirmed that there is an existing 12" gas line east of the industrial area (see solid pink line on exhibit below) rated for a maximum operating pressure of 3,450 kPa that could support higher pressure future industrial applications. There are also 4" lines (see dashed red lines below) with a maximum operating pressure of 1,900 kPa that could support commercial or light industrial applications and 4" lines (see dashed teal lines below) rated for a maximum operating pressure of 420 kPa that could support space heating applications or light commercial/industrial applications. All lines are subject to detailed review and capacity analysis based on future specific development applications.



National Street Industrial Area

The National Street industrial area is located north of Maley Drive on National Street within the Township of Garson. Enbridge Gas has confirmed that there is an existing 6" gas line (see dashed red line on exhibit below) rated for a maximum operating pressure of 1,900 kPa that could support commercial or light industrial applications and 4" lines (see dashed teal lines below) rated for a maximum operating pressure of 420 kPa that could support space heating applications or light commercial/industrial applications. If additional industrial lands were to develop north of the existing buildings, there would be a requirement for the gas line to be extended within National Street to service the future applications. All lines are subject to detailed review and capacity analysis based on future specific development applications.



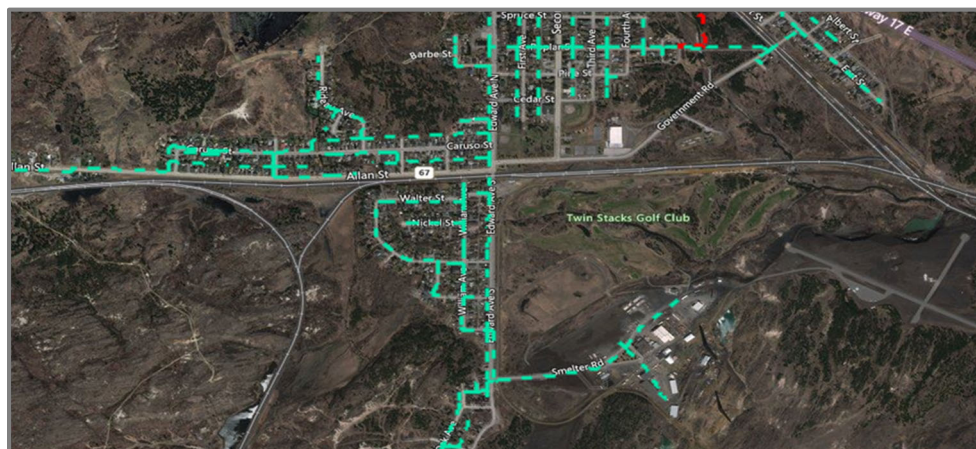
Maley Drive Industrial Area

The Maley Drive industrial area is located east of Falconbridge Highway on Maley Drive, within the Township of Garson. Enbridge Gas has confirmed that there is an existing 6" gas line (see solid pink line on exhibit below) rated for a maximum operating pressure of 3,450 kPa that could support higher pressure future industrial applications. There are also 4" lines (see dashed red lines below) with a maximum operating pressure of 1,900 kPa that could support commercial or light industrial applications, as well as 2", 4", and 6" lines (see dashed teal lines below) rated for a maximum operating pressure of 420 kPa that could support space heating applications or light commercial/industrial applications. All lines are subject to detailed review and capacity analysis based on future specific development applications.



Coniston Industrial Area

The Coniston industrial area is located southeast of the Trans-Canada Highway and Kingsway intersection, in the Township of Neelon. Enbridge Gas has confirmed that there are existing 2" gas lines (see dashed teal lines on exhibit below) rated for a maximum operating pressure of 420 kPa that could support space heating applications. All lines are subject to detailed review and capacity analysis based on future specific development applications.



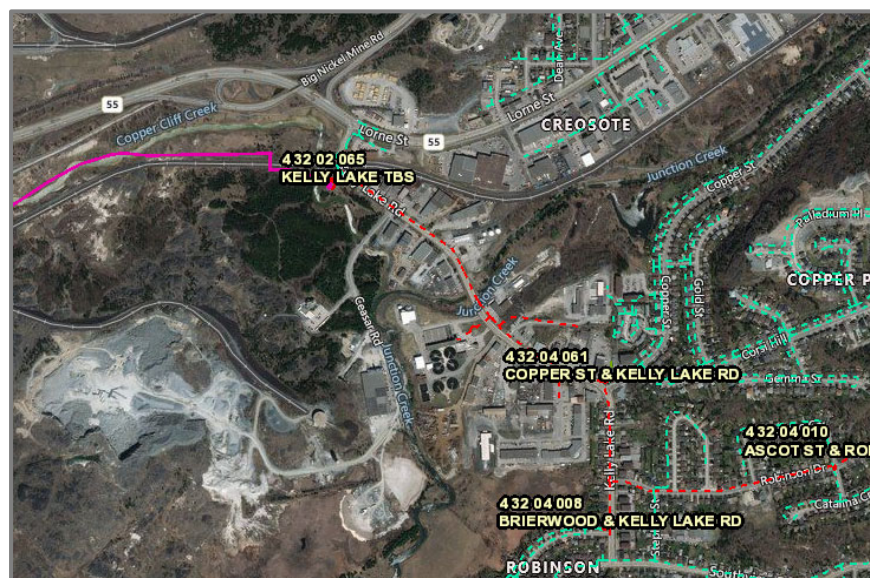
Kingsway Industrial Area

The Kingsway industrial area is located east of Falconbridge Road on Kingsway, within the Township of Neelon. Enbridge Gas has confirmed that there is an existing 4" plastic gas line (see teal dashed lines on exhibit below) within Kingsway rated for a maximum operating pressure of 420 kPa, and that this line is likely sufficient for traditional space heating applications in the future, subject to detailed review and capacity analysis based on future specific development applications.



Ceasar Road Industrial Area

The Ceasar Road industrial area is located south of Big Nickel Road along Kelly Lake Road and Lorne Street, in the Township of McKim. Enbridge Gas has confirmed that there are existing gas lines within Kelly Lake Road (see red dashed lines on exhibit below) rated for a maximum operating pressure of 1,900 kPa, and that this line may be able to support higher minimum delivery pressures and heavier industrial usage, subject to detailed review and capacity analysis based on future specific development applications.



Valley East Industrial Area

The Valley East industrial area is located south of Main Street along Belisle Drive and White Street, within the Township of Val Caron. Enbridge Gas has confirmed that there is a 2" steel line within Belisle Drive (see green dashed lines on exhibit below) rated for a maximum operating pressure of 550 kPa, and that this line could support space heating loads and potentially light commercial/industrial applications, subject to detailed review and capacity analysis based on future specific development applications.



APPENDIX 4 – COMPARATIVE MARKETS ANALYSIS

Introduction

As part of this Employment Land Strategy, the City of Greater Sudbury sought insights into how the city compares to other markets – both across Northern Ontario, as well as select markets in South-Central Ontario, as well as Quebec. The purpose of this work is to provide a competitive analysis of the Greater Sudbury's employment land supply relative to its competition, and make recommendations that could improve on the city's competitive advantage. The list of comparative markets is as follows: Barrie, Hamilton, Kingston, London, North Bay, Peterborough, Sault Ste. Marie, St. Catharines-Niagara, Thunder Bay, and Timmins.

Greater Sudbury's nearest competitors in Northern Ontario include the following:

- North Bay – offers 4-lane highway access, an airport, and is only 1.5 hour drive from Greater Sudbury. Located approximately 125 km to the east of Sudbury.
- Sault Ste. Marie – offers US border adjacency. Located roughly 275 km west of Sudbury.
- Timmins – is situated too far north; it competes only for the mining sector. Located roughly 275 km north of Sudbury.
- Parry Sound – a much smaller population base, with significant seasonality to its economy. Located approximately 150 km south of Sudbury. Given its size (the Parry Sound Census District had a population of approximately 43,000 in 2016 – with little change from 2011), it has been excluded from our analysis of comparative markets.

Key Industries and Targeted Employment Growth Sectors

Barrie

A strong mix of manufacturing, information technology, and cultural industries allows Barrie to stay consistent during economic cycles. These key sectors have global leaders who are driving innovation and growth in the community.

- Medical Technology – Industry leaders in community health, medical device manufacturers, and emerging industries such as cannabis, are driving growth in life sciences in Barrie.
- Data Centre, Security & Cloud Services – Data centres choose Barrie because of the location, climate, technology, and energy infrastructure.
- Food & Beverage – Competitive building prices, young talent, and local resources foster growth in Barrie's food and beverage sector.
- Automation & Precision Manufacturing – Barrie's low costs of doing business helps automation and precision manufacturers stay competitive internationally.
- Technology, Software Development & Digital Media – Whether you're in data processing, gaming, app development, or computer programming, Barrie has the right mix of talent, tech, and creatives to help you succeed.
- Aerospace – Barrie has unique strategic advantages in its emerging aerospace sector, thanks to proximity to Lake Simcoe Regional Airport and Canadian Forces Base Borden.¹

¹ <https://investbarrie.ca/why-barrie/key-sectors>

Hamilton

Hamilton was built around a legacy of advanced manufacturing, which continues to be a huge contributor to the local economy. Additional technologically-advanced industries have grown naturally to support the manufacturing cluster, creating a community that embraces cutting-edge science and technology.

Hamilton is also home to world-class universities, colleges, and research-intensive companies that have created an ideal environment for new product development and innovation. Industry and academia work together in Hamilton to lower the cost of commercialization and bringing products to market. Startups and entrepreneurs thrive in this hard working, high-tech city, where the cost of entry is very competitive with other tech-centric cities in the region. Hamilton's location – with close proximity to US border crossings and major international airports – provides businesses with ample opportunities for trade, transportation, and talent acquisition.²

- **Advanced Manufacturing** – Built on a strong history of steel production, Hamilton now attracts cutting-edge industries in advanced manufacturing.
- **Agribusiness and Food Processing** – Robust supply chains and logistics infrastructure make Hamilton a strong producer and transporter of food products.
- **Creative Industries** – Hamilton is home to musicians, artists, writers, film makers, and fashion designers.
- **Finance, Insurance, and Real Estate (FIRE)** – Hamilton's position within Canada's most populous region makes the city a major player in FIRE industries.
- **Goods Movement** – Supported by well-established infrastructure and proximity to airports, major highways, and border crossings.
- **ICT & Digital Media** – Powered by highly educated experts with industrial and academic support for research and innovation.
- **Life Sciences** – Producing improved health care products and services, as well as bioengineering and cellular research.
- **Tourism Industry** – Tourism in Hamilton is welcoming more people from across the region, nation, and world, through a number of exciting attractions and events.³

Kingston

Kingston is a beautiful, modern, and strategically located Smart City that offers many advantages for local businesses. No other site in Ontario can match Kingston's unique combination of strategic geographic location, state-of-the-art infrastructure, diverse workforce, and concentration of research & development capabilities. Strategically located in the middle of North America, Kingston is the regional centre for Eastern Ontario. Located along Highway 401, on the coast of Lake Ontario, Kingston is a short drive from major Ontario business centres, including Toronto and Ottawa, as well as Montreal and the American border.⁴

The City is committed to creating a high quality of life for residents by fostering opportunities that support social development, create jobs, and build prosperity. With a focus on innovation, Kingston will engage young people, entrepreneurs, innovators, artists, and creative citizens in facilitating economic growth.

² <https://investinhamilton.ca/discover-hamilton/>

³ <https://investinhamilton.ca/industries/>

⁴⁴ <https://www.kingstonecdev.com/invest>

The City will attract companies and private sector development in and from emerging markets and growing economies, to build on our assets and strengths, capitalize on talent, and seize global opportunities. In partnership with others, innovation hubs in health care, bio-technology, clean technology, education, and the arts will be created while supporting tourism, arts and culture, and rural economic development.⁵

London

London has a diverse economy, with strengths in educational services; health care and social assistance; retail; accommodation and food services; and professional, scientific, and technical services. London's fastest-growing, key sectors include:

- **Agri-Food** – London's agri-food sector is known for attracting historic investments, which has established the region as an ideal hub for agri-food production. Employing more than 7,000 people across 90+ companies, London's agri-food sector has strengths in large-scale meat processing, frozen foods including pizza and desserts, spices, and alcoholic beverages, in addition to emerging sub-sectors such as health and fermented foods, cannabis, and ready-made meals.
- **Manufacturing** – With more than 34,300 employees and 500 companies, the advanced manufacturing sector in London represents approximately 12% of all employment in the region. Defense and composite material-based products are driving growth in this sector, as well as the automotive, transportation, aerospace, sporting goods, and building products industries.
- **Digital Media + Tech** – London has strengths in information communication technology (ICT), digital media, software as a service (SaaS), game development, eCommerce, and financial technology. 350+ companies employ over 9,000 people in this sector, who are developing products that influence many other industries – from enhancing medical procedures and manufacturing processes to making every day financial transactions easier and secure.
- **Health** – London's 60+ companies and hospitals and their 25,000+ employees embrace strengths in clinical trials, medical devices, and medical technologies. With a complete range of scientific, clinical, testing, and data management services available, London has the leadership, facilities, talent, and capabilities to support start-ups, scale-ups, and mature companies. London's many strengths in the health sector are based on a foundation of highly regarded academic and clinical research capabilities, supported by two large research facilities, two teaching hospitals, contract research organizations, and an innovative private sector.
- **Professional Services** – London is recognized as an established, regional centre for professional and business services, including more than 500 companies, organizations, and institutions employing over 52,800 people in education, government, finance, insurance, accounting, customer service, and corporate offices.⁶

North Bay

North Bay's diverse local economy is supported by vibrant business and industry sectors.

Manufacturing – A diverse variety of products are manufactured in North Bay, ranging from the world's first fuel-cell to power a locomotive, to construction consumables, drill rigs, vehicles, pedal boats, kayaks, and more. Company capabilities range from machining to plastic injection moulding, to foundry, chrome plating, and galvanizing. From CNC plasma cutting to polyethylene extrusions, weaving and coating, from light assembly to heavy fabrication and re-manufacturing of railcars, locomotives, and aircrafts, and so much more.

⁵ <https://www.cityofkingston.ca/apps/councilpriorities/>

⁶ <https://www.ledc.com/key-sectors>

Aviation & Aerospace – There are over 31 individual businesses based at the airport, providing a variety of aviation and non-aviation services. A significant cluster of aerospace firms is involved in a wide range of activities established at the airport, including aircraft manufacturing/assembly, maintenance, repair and overhaul (MRO) (Voyageur Aerotech), and flight training and post-secondary aviation training activities (Canadore College). These companies employ in excess of 500 employees.

Mining Supply & Services – While there are no mines in North Bay, the local presence of the mining supply and services sector indicates that the North Bay region is an excellent strategic location to supply the mining industry. Well-developed air, rail, and road transportation infrastructure enables local companies to easily service mines throughout Canada and the world. Over 60 Mining Supply & Services businesses call North Bay home, with a growing list of multinational headquarters. As Canadian-based mining companies develop properties worldwide, North Bay provides a cost-effective location to establish new and expanded export-oriented mining supply operations.

Education – North Bay has educational programs ranging from pre-school to university. In addition to providing education to today's youth, the four school boards in North Bay offer continuing education services to the area's adult population. Private training institutions such as CTS Canadian Career College and Modern College of Hairstyling & Esthetics offer additional educational opportunities. Nipissing University and Canadore College (co-located on a campus) are leading economic engines for North Bay and region.

Forestry – The City of North Bay is within the forest management unit known as the “Nipissing Forest”. Wood from the Nipissing Forest is processed into pulp, paper, veneer, dimensional lumber, oriented strand board (OSB), fuelwood, pallets, and specialty products, and is delivered to more than 20 forest resource processing facilities in the region.

Health Sciences – North Bay has a strong and innovative health care sector. The medical community is comprised of specialists and general practitioners that provide patients throughout the region with the highest quality of care. The North Bay Regional Health Centre (NBRHC) is a partnership involving the North Bay and District Hospital and the Northeast Mental Health Centre.

Information Communication Technology – In the IT field, North Bay is recognized for software development, application, and hardware maintenance. Canada's twin fibre-optic routes crisscross only in North Bay, providing full redundancy and a unique competitive advantage. This sector includes the following: Telecom services and equipment; Back office shared services and contact management centres; Software development, hardware support, and services; and Digital media, web development, and film and television production.⁷

Peterborough

Unlike traditional manufacturing communities that tend to focus on one sector, Peterborough has long been a place where industrial, agricultural, and cultural businesses cooperate, collaborate, and flourish.

Advanced Manufacturing – The business models of our manufacturing companies include custom engineering, innovation, and lean manufacturing, making these companies part of the Advanced Manufacturing sector.

Aerospace – With a community of operations at and in close proximity to Peterborough's Airport and aerospace business park, Peterborough is a leading base for national and international manufacturing, repair and overhaul; research and development; and training.

⁷ <https://www.investinnorthbay.ca/community/industry-overview/>

Agriculture – Rolling hills of heritage farmlands blended with esteemed Ontario cottage country and vibrant urban landscapes are what makes Peterborough & the Kawarthas unique as a destination for both visitors and investment.

Tourism – Peterborough & the Kawarthas has the perfect blend of country and city landscapes and experiences.

Clean Tech – Peterborough & the Kawarthas is a region that has been shaped by two key things: innovative minds, and our connection to water with the Trent-Severn Waterway winding its way through our landscapes.⁸

Sault Ste. Marie

With its industrial roots, Sault Ste. Marie has been a manufacturing hub for over 100 years. Harnessing the local natural resources and capitalizing on its location, Sault Ste. Marie is a leading producer of steel, forestry products, renewable energy, and much more. The city continues to build on its traditional industries, as well as focusing on advanced manufacturing, and emerging industries such as ICT & digital, clean tech, lottery & gaming, aviation, and more.⁹ Once seen as strictly a steel town, Sault Ste. Marie continues to diversify its economy and has experienced growth in other sectors such as alternative energy, science and technology, aviation services, and business-process outsourcing.¹⁰

St. Catharines-Niagara

While Niagara's tourism story is a four-season best-seller, there is a whole lot more going on in Niagara today. It takes more than a good location to become one of the continent's busiest economic corridors. Niagara is home to state-of-the-art smart factories, cutting-edge agricultural technology that is changing the way the world is fed, and innovative warehousing and shipping solutions that are setting the region apart as a hotbed for international trade.

Manufacturing – Home to manufacturing icons like General Motors and Airbus, as well as small and strategic producers that are using today's technology to make their mark on a wide variety of markets, Niagara's manufacturers are diverse, driven, and keen to leverage every advantage associated with their proximity to the US.

Agri-Business – Niagara may be known as Ontario's fruit basket, but that's just a fraction of what the agri-business sector here puts on the table. Niagara's growers are also cashing in on cash crops, making green from four-season greenhouse operations, and developing innovative new solutions through partnerships with research partners.

Tourism – Niagara is one of the world's most beloved four-season vacation destinations, and one of Canada's most popular locations for conferences, conventions, and weddings. Explorers can take in a world-class wine, craft beer, and culinary scene; renowned theatre and live entertainment; Canada's largest casino; designer shopping; dozens of golf courses; buzzed-about spas; and so much more.

Emerging Sectors – Sectors like computer systems design, scientific research and development, architecture and engineering, and technology and innovation, are all thriving in Niagara Region. Growth in these technical sectors is set to continue with easy access to some of the continent's top talent.¹¹

⁸ <https://peterborough.ca/peterborough-industries/>

⁹ <https://investsaultstemarkie.com/key-sectors/>

¹⁰ <https://investsaultstemarkie.com/why-sault-ste.-marie/major-employers-industry/>

¹¹ <https://niagaracanada.com/key-sectors/>

Thunder Bay

Thunder Bay is a diverse and modern economy with endless natural resources, entrepreneurial SMEs, and world-leading research capabilities. Research and innovation are revitalizing our traditional forestry and mining industries, while science and technology are creating high-growth opportunities in health and education sectors. The high levels of creativity and innovation among local entrepreneurs has also resulted in small business clusters, and the emergence of thriving new sectors in local food, agriculture, and tourism.

Aerospace – The City of Thunder Bay, along with the Thunder Bay International Airport, are service hubs for northern communities and the mining sector, and an economic engine for the community, generating hundreds of millions of dollars in local economic activity, while providing one of the largest employment generators in the region. The Airport links the city and its northwest Ontario catchment area to centres of national and international commerce.

Forestry – The wood products manufacturing industries include businesses such as sawmills, veneer mills, and structural board and lumber plants, producing construction materials and specialty wood products. Pulp and paper mills are the largest types of plants for converting timber fibre to forest products. The forest envelops the economy and culture of Northwestern Ontario as inexorably as it covers the land.

Health Sciences – Thunder Bay boasts a strong and innovative health sciences sector, including a local Medical School, DNA labs, and a renowned research institute. Thunder Bay Regional Health Sciences Centre (TBRHSC) is a leading teaching and research hospital, serving all of Northwestern Ontario. The Thunder Bay Regional Research Institute (TBRRI) is an innovative, brand new facility, equipped with advanced technology that attracts world-class talent. It is contributing millions of dollars to Thunder Bay's economy and driving the growth of the Life Sciences Manufacturing cluster including innovative young businesses and ground-breaking research.

Information and Communications Technologies (ICT) – With an extensive fibre optic network, Thunder Bay has excellent communication and technology infrastructure. Thunder Bay's ICT sector is a dynamic cluster of businesses that includes telecommunications, film, television, technology, digital, and computer services organizations.

Manufacturing/Advanced Manufacturing – The manufacturing sector in Thunder Bay is poised for strong growth due to the city's strong economic performance, low property and operating costs, highly skilled labour force, and proximity to US and global markets. Thunder Bay is currently home to over 177 manufacturing businesses, which makes up just over 5% of its labour force. Internationally recognized companies, such as Bombardier and Resolute Forest Products, have a proud history of manufacturing in Thunder Bay. Today, exciting new opportunities are emerging in traditional, advanced, and specialized manufacturing sectors including wood products, aerospace, life sciences, clean water, food and beverage, agriculture, mining machinery, and transportation.

Medical Devices and Remote Health Care – Jobs in the health care, medical, and social assistance industry are more highly concentrated in Thunder Bay than in most Canadian cities, and have enjoyed a stable labour supply of educated professionals in recent years. With a strong outlook as a growth industry, the medical devices and remote health care sectors represent a unique and encouraging investment opportunity for both established and up-and-coming companies.

Tourism – Year-round opportunities drive the local tourism industry. The Gateway to Northwest Ontario and the 150,000 lakes and rivers in the area, Thunder Bay is where the most epic outdoor adventures begin. Climb to one of the highest points in the province, sail in the world's largest freshwater lake, explore historic sites, and indulge in culinary delights – and that's just day one!¹²

¹² <https://gotothunderbay.ca/key-sectors/>

Timmins

The City has a focus on opportunities in the following sectors: mining (including mining supply and services); cold weather testing; scientific research; data centres; winter filming; agriculture; and mineral exploration.

Mining Supply and Services – The City of Timmins is a mining powerhouse, where almost half of all Ontario's metal mining operations are located within a 300 km radius. As one of the largest cities in the north, Timmins has a strong and diverse economy encompassing resource-based industries and manufacturing. Timmins is the largest producer of gold, which is Ontario's highest valued mineral production at nearly \$4 billion annually. Timmins' central location between Northern Ontario and northwestern Quebec mining centres makes it an ideal location for equipment manufacturers and service providers to access both Ontario and Quebec markets.

Cold Weather Testing – Throughout the winter, you can expect freezing temperatures, ice, snow, slush, freezing rain, and high wind speeds. From November to March, the weather remains consistently cold, with significant amounts of snowfall throughout the extended winter. Timmins has the support network needed to conduct successful testing throughout the winter season. Cold weather testing is a developing field for many manufacturers and their clients. Consumers demand products that perform well in all-weather situations; therefore, there is a strong need to test these products in real-world settings.

Scientific Research – Timmins acts as the intermediary with Glencore Canada Corporation, which operates the deepest base metal mine in the world, over 2,900 metres (9,514 ft) underground, where the opportunity for a deep-underground laboratory exists. How deep underground scientists are able to conduct experiments is of significant importance in order to elude the universe's cosmic rays that bombard Earth and interfere with experimentation. Scientists seek to evade these cosmic rays to conduct experiments in isolation and have more conclusive results.

Data Centres – The City of Timmins is the ideal and cost-competitive location to house a major data centre. It features a cool climate overall, with a low risk of natural disasters, and plenty of industrial land available for development. With an average annual temperature that only exceeds 24°C (75°F) four times, the cool climate is favourable for maintaining low operational costs. The abundance of lakes and rivers in the area provide an opportunity to use unique, environmentally-sound cooling options that could help reduce the overall electricity consumption required for a high end centre.¹³

Summary

The following exhibit presents a summary of the key industries and targeted employment growth sectors identified on the websites of the respective municipalities.

¹³ <http://www.timminsedc.com/business/invest/investtimmins/>

KEY INDUSTRIES AND TARGETED EMPLOYMENT GROWTH SECTORS											
	Greater Sudbury	Barrie	Hamilton	Kingston	London	North Bay	Peterborough	Sault Ste. Marie	St. Catharines-Niagara	Thunder Bay	Timmins
Industry Sectors											
Agriculture & Agribusiness			✓		✓		✓		✓	✓	
Aerospace & Aviation		✓				✓	✓	✓		✓	
Arts & Culture/Film/Creative Industries	✓		✓	✓							
Bio-Technology				✓							
Clean Technology/Renewable Energy	✓			✓		✓	✓				
Cold Weather Testing											✓
Data Centres		✓									✓
Education				✓	✓	✓				✓	
Food & Beverage		✓			✓					✓	
Food Processing			✓								
Forestry/Forest Products						✓		✓		✓	
Goods Movement			✓								
Health Care/Life Sciences	✓		✓	✓	✓	✓				✓	
Lottery & Gaming								✓			
Manufacturing/Advanced Manufacturing	✓	✓	✓		✓	✓	✓	✓	✓	✓	
Medical Technology		✓									
Mining/Mining Supply & Services	✓					✓					✓
Professional & Technical Services/FIRE	✓		✓		✓				✓		
Scientific Research	✓										✓
Technology, Software & Digital Media (ICT)		✓	✓		✓	✓		✓	✓	✓	
Tourism	✓		✓	✓			✓		✓	✓	

Employment/Industrial Land Supply

Barrie

Land Supply – As of January 2018, the City of Barrie had a total of 526 gross ha (1,300 gross acres) of vacant designated employment land, including a net developable vacant employment land supply of 444 net ha (1,100 net acres). Based on a desktop review of lands with direct access to roads and servicing of water and wastewater, it is estimated that approximately 276 gross ha (682 net acres) are considered serviced, representing approximately 53% of the vacant land supply.¹⁴

¹⁴ <https://www.buildingbarrie.ca/9628/documents/17602>

City-owned Lands – According to news outlet Simcoe.com, Barrie sold its last remaining parcel of vacant industrial land, 44 Hooper Rd., to SiteCom Services for \$295,000 in March 2020.¹⁵

Hamilton

Land Supply – In November 2019, the City of Hamilton completed a draft Employment Land Review report. A Land Needs Assessment (LNA) was completed in 2020 which concluded that employment land need and supply are anticipated to be balanced to the year 2051; no new employment land is needed. In Hamilton, three of the city's employment areas have been identified as Provincially Significant Employment Zones (PSEZs): Bayfront Industrial Area, East Hamilton Industrial Area, and Stoney Creek Business Park; Red Hill North and South Business Parks; and Airport Employment Growth District. The following is a summary of vacant employment land:

- Airport Employment Growth District – 331 net hectares vacant
- Ancaster Business Park – 91 net hectares vacant
- Bayfront Industrial Area – 47 net hectares vacant
- Dundas Industrial Area – <1 net hectare vacant
- East Hamilton Industrial Area – 8 net hectares vacant
- Flamborough Business Park – 53 net hectares vacant
- Red Hill Business Park North – 51 net hectares vacant
- Red Hill Business Park South – 161 net hectares vacant
- Stoney Creek Business Park – 58 net hectares vacant
- West Hamilton Industrial District – 9 net hectares vacant
- Total – Approximately 810 net hectares vacant¹⁶

City-owned Lands – The City's website currently lists two properties for sale within industrial parks. There is a 10 acre parcel with M2 – Prestige Industrial zoning, and a 13.4 acre parcel with M3 – Prestige Business Park zoning.

Kingston

Land Supply – While scattered industrial lands are located throughout the urban and rural areas of the city, the current supply of industrial land is generally contained in six industrial areas:

- Gardiners Road / Cataraqui North Industrial Area;
- Progress Avenue / Nortel Industrial Area;
- Kingston Airport Industrial Area;
- Clyde/Binnington/Alcan Industrial Area;
- Old Industrial Area; and,

St. Lawrence Business Park.¹⁷

City-Owned Lands – Kingston is home to four fully-serviced, shovel-ready business parks. These City-owned industrial lands have state-of-the-art infrastructure with easy access to Highway 401 and the downtown core.

¹⁵ <https://www.simcoe.com/news-story/9878282-the-price-of-doing-business-this-is-what-barrie-got-for-its-final-parcel-of-industrial-land/>

¹⁶ <https://www.hamilton.ca/sites/default/files/media/browser/2020-10-30/coh-employment-area-inventory-2019.pdf>

¹⁷ <https://www.cityofkingston.ca/business/planning-and-development/planning-studies/land-review>

- Alcan Business Park – Lands are designated for mixed use business activities such as research and development, light manufacturing and assembly, data processing facilities, and corporate or professional offices. Approaching build-out; just one 0.6 hectare vacant parcel remaining.
- Catarauqui Estates Business Park – Prestige in character, accommodating a number of small to medium to large sized businesses, including manufacturing and assembling operations, processing plants, warehousing and distribution facilities, and business or professional offices. Lands are a mix of Business Park Industrial and General Industrial uses. Lots range in size from 0.25 to 6 hectares.
- Clyde Industrial Park – Accommodates a broad range of sectors such as construction, wholesale trade, transportation, manufacturing, and professional, scientific, and technical services. The park is approaching full build-out, with only two municipally owned vacant parcels remaining.
- St. Lawrence Business Park – Highly prestige in character, it is home to distribution/logistics, scientific, medical, and technical services, and other commercial uses. Parcels range from less than 0.5 hectares to approximately 3 hectares.

London

Land Supply – London offers shovel-ready, fully serviced lands in a variety of sizes. These Class-A serviced lands are located next to highways 401 and 402 with easy access to three United States (U.S.) border crossings and an international airport.

City-owned Lands – London offers shovel-ready, fully serviced lands in a variety of sizes. These Class-A serviced lands are located next to highways 401 and 402 with easy access to three United States (U.S.) border crossings and an international airport. The City of London has five municipally-owned Industrial Business Parks that offer a range of vacant, serviced, industrial land available for sale.

- Innovation Park (181 acres/73 ha available) – Innovation Park is a 4-phase City-owned park located north of Highway 401, west and east of Veteran's Memorial Parkway, and south of Hamilton Road. Sanitary sewers, storm sewers, and water services are available.
- Skyway Industrial Park (5 acres/2 ha available) – Skyway Industrial Park is adjacent to the London Airport, located east of Veteran's Memorial Parkway, west of Crumlin Side Road, and north of Oxford Street East.
- Trafalgar Industrial Park (<2 acres/<1 ha available) – Trafalgar Industrial Park, Phase III (A) is located north of Trafalgar Street, east of Veteran's Memorial Parkway, west of Crumlin Side Road, and south of Admiral Drive. Phase III (B) is located south of Dundas Street, east of Veteran's Memorial Parkway, west of Crumlin Side Road, and north of Admiral Drive.¹⁸

North Bay

Land Supply – Municipal industrial land is available for qualified projects in the Gateway Industrial Park and Airport Industrial Business Park. There are hundreds of acres of undeveloped industrial-designated lands surrounding the city.

City-Owned Lands – There are three municipally-owned sites within the Gateway Industrial Park totaling approximately 4 hectares (9 acres), as well as lands available within the Airport Industrial Business Park.

Peterborough

Land Supply – Economic Development staff indicate that the supply of vacant industrial/employment land is limited; they have identified three lots on Technology Drive totaling approximately 9 hectares.

¹⁸ <https://www.ledc.com/industrial-land>

The City is working with Trent University to create an 85-acre employment park at the University, to be known as Cleantech Commons. It is envisioned as a university-linked Research and Technology Park.¹⁹

City-Owned Land – The City’s website describes City-owned industrial land being available for \$100,000 per acre. The website links to Realtor.ca, but does not specifically list sites for sale. City staff from Economic Development advised that there is very little municipally-owned industrial land available – perhaps only a single site of approximately 1.2 ha (3 acres) at 915 Major Bennet Drive. For the purposes of this analysis, the City is not considered an active participant in the industrial/employment land market.

Sault Ste. Marie

Land Supply – The city has a vast industrial area along its waterfront, situated west of the downtown area; on the north and northeast edges of its Urban Settlement Area; and other smaller, dispersed sites.

City-Owned Land – The City is an owner of industrial lands, and are currently working on an updated industrial land strategy.

St. Catharines-Niagara

Land Supply – Niagara Region has a large supply of vacant designated employment lands. The combined supply of designated land in the Non-Gateway (urban employment lands located in Grimsby, Lincoln, West Lincoln, Pelham, St. Catharines, Niagara-on-the-Lake and Wainfleet) and Gateway (Welland, Niagara Falls, Fort Erie, Thorold, and Port Colborne) municipalities is just less than 2,300 net hectares.²⁰

City-Owned Lands – The municipal websites for St. Catharines and Niagara Falls do not indicate that there is any City-owned employment land.

Thunder Bay

Land Supply – Vacant industrial lands are distributed across the three types of Official Plan categories as follows: Light Industrial (520 gross hectares), Heavy Industrial (202 gross hectares), and Business Area (47 gross hectares), on nearly 450 total sites. Thunder Bay has a vacant Commercial land inventory of some 84 gross hectares across over 350 individual sites; however, most of the undeveloped land inventory is comprised of very small parcels. There is a vacant Institutional land inventory of some 24 gross hectares across 16 individual sites.

City-owned Lands – The City owns industrial lands within Innova Business Park. The Business Park totals approximately 34 hectares. Presently, six sites have been developed for office and industrial uses, totaling a gross floor area of just less than 8,000 m², across almost 5 net hectares. This leaves a total of 29 net hectares undeveloped. City-owned Innova Business Park lot prices start at \$70,000 per acre.²¹

Timmins

Land Supply – There are large, designated employment areas to the east and west of the city – including east of Porcupine Lake.

¹⁹ <https://cleantechcommons.ca/>

²⁰ <https://niagararegion.ca/council/Council%20Documents/ICP%208-2014.pdf>

²¹ City of Thunder Bay Employment Land Strategy 2020. Cushman & Wakefield et al. September 2020.

City-Owned Lands – In April 2010, the 86-acre McBride Street North property was declared surplus to the needs of the municipality. Almost 10 years after the Timmins Industrial Park was created, the City announced in early 2020 that it is selling the first property at the site. City Council approved selling a 1.05-acre piece of land directly to Blais Capital Inc. for \$43,700.²²

Best Practices for Municipally-Owned Industrial/Employment Lands

Municipal ownership/development of vacant industrial lands is arguably a strategy best suited to small to mid-sized, slow-growing markets, with a limited extent of local private sector land development players. In these cases, the municipality can take the risk to spend capital to subdivide and service industrial/employment lands, and seek to attract users as part of its economic development efforts. The trade-off in capital spending is realized in future employment growth and building the tax base (as well as land sales – which can be priced at-cost, or competitively at-market, as dictated by market forces). The municipality has the financial means to up-front the cost of infrastructure/land servicing and be patient for longer-term opportunities, whereas the private market may be more inclined to seek a return on its investment over a shorter horizon. A municipality can play an important role in the local industrial land market because it offers land/lots for sale to prospective owner-occupiers as well as builders/landlords, since it may be the case that much of the private sector landowner market is focused on being a developer and landlord (i.e., constructing a building and retaining ownership as a landlord, and leasing to a tenant). While the latter point is less clear, in general, the aforementioned conditions are observed in the City of Greater Sudbury.

The following provides a summary of best practices related to municipally-owned employment lands.

- Available lands should be actively marketed – Municipal websites should be updated to reflect current land holdings, and local real estate brokerages should be provided with periodic updates regarding employment land availability. Key metrics to be disclosed include the following: municipal address and general location; land area; Official Plan and Zoning designations, along with permitted uses; and asking price and key terms of sale.
- Offer a range of site selection attributes, where feasible – Lands/lots should be made available in a range of sizes to suit smaller owner-users or investors, along with larger occupiers that may emerge. Lands should also be offered to suit a range of uses (zoning designations), including light industrial and heavy industrial lands, so that occupier needs across a spectrum of industries may be readily accommodated. From a servicing standpoint, shovel-ready lands should be made available (at least a portion of the land inventory should be fully serviced and ready for on-site construction to commence as soon as development approvals are obtained).
- Lands should be periodically appraised to ensure asking prices are aligned with market values – the municipality should engage an appraiser to provide a valuation of its land holdings on a periodic basis, and as market conditions evolve. Benchmarking against recent known sales in the market will ensure that asking prices for land/lots reflects current market conditions.
- Requirement to build within an agreed-upon timeframe – In order to ensure that the municipality's lands are not bought by land speculators, the purchase agreement should have a clause that the buyer must obtain a building permit and commence construction within a reasonable period of time (e.g., 12 months) – otherwise, the municipality can reacquire the lands at the original transaction price, less expenses.

²² <https://www.northernontariobusiness.com/regional-news/timmins/city-sells-first-property-in-timmins-industrial-park-2018095>

Industrial Land Prices

The following exhibit illustrates the prevailing price range for industrial land across the comparative markets, based on a review of recent transaction activity and current listings for sale, as well as discussions with local real estate brokerage professionals and property appraisers. These prices generally reflect land which has municipal services and utilities in place at the property boundary (unless otherwise noted), and parcels that have already been severed into an individual development site (although some comparables are larger parcels which have not yet been sub-divided, representing the lower end of the pricing range, due to longer timing to development). Some sites are “shovel-ready” (upper end of pricing range), while others may require site preparation prior to construction (reflecting the lower end of the pricing range).

INDUSTRIAL LAND PRICES		
Market	Industrial Land (\$ per acre)	Industrial Land (\$ per hectare)
Greater Sudbury	\$100,000 (long-term land) \$325,000 - \$375,000 (serviced lots)	\$40,000 (long-term land) \$130,000 - \$150,000 (serviced lots)
Barrie	\$350,000 - \$500,000	\$140,000 - \$200,000
Hamilton	\$200,000 - \$450,000 (not subdivided) \$400,000 - \$1 million (smaller parcels)	\$80,000 - \$180,000 (not subdivided) \$160,000 - \$400,000 (smaller parcels)
Kingston	\$50,000 - \$100,000 (not subdivided)	\$20,000 - \$40,000 (not subdivided)
London	\$100,000 (long-term land)	\$40,000 (long-term land)
North Bay	\$20,000 - \$60,000 (municipally-owned) \$100,000 - \$150,000 (privately-owned)	\$10,000 - \$25,000 (municipally-owned) \$40,000 - \$60,000 (privately-owned)
Peterborough	\$150,000 - \$200,000	\$60,000 - \$80,000
Sault Ste. Marie	\$75,000 - \$175,000	\$30,000 - \$70,000
St. Catharines-Niagara	\$250,000 - \$350,000	\$100,000 - \$140,000
Thunder Bay	\$150,000 - \$275,000	\$60,000 - \$110,000
Timmins	\$40,000 - \$50,000 (municipally-owned)	\$15,000 - \$20,000 (municipally-owned)
<i>Note: The 2021 Altus Group Canadian Cost Guide indicates site servicing costs for industrial land of approximately \$200,000 per acre in the Greater Toronto Area (a range of \$157,000 - \$240,000 per acre). This has been added to the figures for Kingston and London when ranking land pricing later in this section.</i>		

Industrial Development Charges

The following exhibit illustrates the prevailing development charge rates for new industrial development across the comparative markets, based on a review of municipal websites. Five of the 11 comparative markets do not collect a development charge for new industrial construction – including all of the Northern Ontario municipalities that were included. Greater Sudbury ranks as the lowest among those comparative municipalities that do impose a development charge, and sixth lowest among the 11 communities overall.

INDUSTRIAL DEVELOPMENT CHARGES				
Market	DC (\$psf)	DC (\$ per m ²)	Comment	Rank (Lowest = 1)
Greater Sudbury	\$3.05	\$32.83	All services	6
	\$2.82	\$30.35	Excluding water service	
	\$2.02	\$21.74	Excluding wastewater service	
	\$1.80	\$19.38	Excluding water and wastewater service	
Barrie	\$20.40	\$219.62		10
Hamilton	\$21.78	\$234.44		11
Kingston		None		1
London	\$19.16	\$206.26	Inside the Urban Growth Area	9
North Bay		None		1
Peterborough	\$12.17	\$131.00		8
Sault Ste. Marie		None		1
St. Catharines/Niagara	\$5.27	\$56.73	Regional development charge only	7
Thunder Bay		None		1
Timmins		None		1

Industrial Property Taxes

The following exhibit presents a comparison of property taxes for industrial buildings across the comparative markets. Greater Sudbury has the highest property tax rate among all of the comparative markets.

INDUSTRIAL PROPERTY TAX RATES (2020)			
Market	Tax Rate	Taxes per \$1 Million Assessed Value	Rank (Lowest = 1)
Greater Sudbury	5.899375	\$5,899	11
Barrie	2.583094	\$2,583	1
Hamilton	4.413374	\$4,413	8
Kingston	4.041798	\$4,042	6
London	3.532945	\$3,533	4
North Bay	2.905456	\$2,905	2
Peterborough	2.9386780	\$2,939	3
Sault Ste. Marie	5.029739	\$5,030	9

St. Catharines/Niagara	3.707030	\$3,707	5
Thunder Bay	4.328485	\$4,328	7
Timmins	5.180808	\$5,181	10
<p><i>Greater Sudbury note: The rate shown applies to the former City of Sudbury.</i></p> <p><i>St. Catharines/Niagara note: The rate shown is a blend of the St. Catharines and Niagara Falls rates.</i></p> <p><i>Note regarding “new industrial”: Barrie, Hamilton, Kingston, Peterborough, and Sault Ste. Marie have a different (slightly lower) rate for new industrial versus existing industrial buildings. The “new” rate is indicated on the exhibit above.</i></p> <p><i>Note regarding “large industrial”: Some municipalities have a different rate for “large industrial”. The “general” industrial rate is shown on the exhibit above.</i></p>			

Incentive Programs

Overview

The information below explores Community Improvement Plans in comparable municipalities to the City of Greater Sudbury. This includes exhibits related to examining the available incentives; Tax Increment Program Elements; and various other programs, summarized by common themes.

Theme 1: Eligibility

Eligibility for the programs is generally specified in the program guide, which makes it accessible for potential applicants to understand the program. Eligibility has several common themes:

1. Brownfield tax and other incentives are capped based on the costs of assessment of contamination (if present), site preparation, site remediation, and what is needed to prepare the site for development and redevelopment. The capping means that the site preparation becomes the fixed maximum for incentives, and the amount of grant/incentive will vary depending on the level of preparation and remediation.
2. There is a mix of eligibility related to conformity to Official Plans and Zoning. Some municipalities require conformity at the time of application, while others allow applications to amend the Official Plan and/or Zoning to occur for a project.
3. Tax arrears must be paid – no arrears are permitted. This is a consistent requirement.
4. Access is generally on the basis of first come, first served. One municipality (that does not have an employment CIP) does a twice-yearly intake with fixed deadlines.

Theme 2: Criteria

Most municipalities do not have specific criteria against which applications are assessed. For the employment CIPs reviewed, only Sault Ste. Marie and Niagara have defined and measurable criteria. Others are much less specific in terms of requirements, or have more general statements (e.g., “substantial public benefit” – with the term not explicitly defined).

Theme 3: Stacking

Stacking is the approach where a project is eligible to apply for more than one program. For example, a project could qualify for both Tax Increment Financing and Municipal Fee Rebates. Most municipalities permit stacking of programs, and access to multiple incentive programs for a given project. Limitations are established for Tax Increment Financing Incentives – where a project is in more than one CIP Area, applicants may only apply for Tax Increment Financing through one of the CIP's.

Theme 4: Application Fee

Only one municipality requires an application fee to accompany the application form.

Theme 5: Communication and Marketing

The quality and level of detail available through the municipal websites varies greatly. Key observations are:

1. Having a program guide and an application form available is a best practice. In one instance, a municipality has an online application portal.
2. Having a contact person for the program in the municipality is important. Some municipalities have a general email inbox which is less than ideal – in this instance, having the email linked to a staff person's email is important.
3. Less important but still good practice is having the full Community Improvement Plan available on the website. In one instance, the municipal website had no information, and an email was needed to obtain the information.
4. Marketing materials that summarize the available programs, eligibility, and how to get answers to questions, is also commonly found. This could be in the form of a program guide. What is important is that the marketing material/program guide is succinct, written in plain language, and free of jargon.

Theme 6: Northern Municipalities

Key findings from Northern Ontario municipalities:

1. All municipalities reviewed have employment land CIPs targeted to their economic sectors.
2. All of these CIP's include Tax Increment Financing ranging from 4 years of increment to 10 years of increment. The exception beyond this is Timmins, which has a mining sector CIP with extended timeframes for the TIF (with very generous terms).

Theme 7: Multiple Programs for Employment Lands

All of the municipalities with employment CIP's provide additional programs for funding. These are related to two general areas: (a) environmental studies and (b) forms of municipal fees. The former is for site remediation for any contamination; the latter is municipal application fees; development charges; or both.

Summary Exhibits

GENERAL SUMMARY						
Market	Employment Land CIP	Name of Employment CIP	Other CIPs	Employment Land CIP Budget	Program Guide Available Online?	Application Form Available Online?
Greater Sudbury	No	• N/A	• Downtown • Brownfields	N/A	Yes	Yes
Barrie	No	• N/A	• Downtown • Affordable Housing • Heritage Buildings	N/A	No	Yes (online portal)
Hamilton	Yes	• Office Tenancy Assistance Program • ERASE • LEEDing the Way	• Residential Water/Wastewater • ERASE (Residential) • ERASE (West Harbour/Downtown) • Several BIA and Commercial Corridor CIPs	Unknown	Yes	Yes
Kingston	No	• N/A	• Brownfields	N/A	No	No
London	Yes	• Industrial CIP • Airport CIP	• Affordable Housing • Brownfields • Heritage	Unknown	No	No
Niagara	Yes	• Gateway CIP	• Smarter Niagara Incentives Program	Unknown	Yes	Yes
North Bay	Yes	• Growth CIP	• Growth CIP also covers Downtown, Housing, and Waterfront.	\$85,000; will increase by \$100,000 in 2022.	Yes	Yes
Peterborough	No	• N/A	• Central Area	N/A	Yes	Yes
Sault Ste. Marie	Yes	• Economic Growth CIP	• Downtown	Unknown	Yes	Yes
St. Catharines	No	• N/A	• Brownfields • Façade	N/A	No	No
Thunder Bay	Yes	• Airport Development Grant	• Strategic Core Area	Unknown	Yes	Yes
Timmins	Yes	• Commercial/Industrial CIP	• Downtown	\$50,000 annually	No	Yes

TAX INCREMENT PROGRAMS – EMPLOYMENT LANDS			
Market	Tax Increment Financing	# of Years	Scale
Greater Sudbury	No	N/A	N/A
Barrie	No	N/A	N/A
Hamilton	Yes	10	80% per year
Kingston	No	N/A	N/A
London	Yes	Up to 10 years	Up to 100% per year
Niagara	Yes	5 or 10 years (depending on location – Strategic Lands in Regional OP receive 10-year TIF)	Score: 0-7: No grant 8: 40% 9: 45% 10: 50% Each additional point = 5%, up to score of 20 = 100%
North Bay	Yes	5	Year 1: 100% Year 2: 75% Year 3: 50% Year 4: 25% Year 5: 0%
Peterborough	No	N/A	N/A
Sault Ste. Marie	Yes	4	Years 1-3: 100% Year 4: 0%
St. Catharines	No	N/A	N/A
Thunder Bay	Yes	Up to 25 years	Unspecified
Timmins – Commercial/Industrial CIP	Yes (projects >\$2.5 million)	5	Year 1: 100% Year 2: 75% Year 3: 50% Year 4: 25% Year 5: 0%
Timmins – Mining CIP (projects \$50-\$250 million)	Yes	10	Year 1: 100% Year 2: 90% Year 3: 80% Year 4: 70% Year 5: 60% Year 6: 50% Year 7: 40% Year 8: 30% Year 9: 20% Year 10: 0%

Timmins – Mining CIP (projects \$250-\$500 million)	Yes	15	Years 1-5: 100% Year 6: 90% Year 7: 80% Year 8: 70% Year 9: 60% Year 10: 50% Year 11: 40% Year 12: 30% Year 13: 20% Year 14: 10% Year 15: 0%
Timmins – Mining CIP (projects >\$500 million)	Yes	20	Years 1-10: 100% Year 11: 90% Year 12: 80% Year 13: 70% Year 14: 60% Year 15: 50% Year 16: 40% Year 17: 30% Year 18: 20% Year 19: 10% Year 20: 0%

EMPLOYMENT CIP – GRANT PROGRAMS

Market	Grant Program	Maximum Allowed	Municipal Fee Rebate	Development Charge Rebate	Environmental Study Rebate
North Bay	• Yes	See specific programs	Up to 100% of City fees (maximum of \$250,000)	Up to 100% of City DCs (maximum of \$250,000)	75% of study, up to \$5,000
Sault Ste. Marie	• Yes – Site Preparation-Focused	\$100,000	No	No	Eligible as part of Grant Program
Timmins	• Municipal Fee Rebate • Environmental Studies	Not specified	Yes	Yes – in Municipal Fee Rebate	Yes – Environmental Study Grant (\$5,000 Phase 1, \$10,000 Phases 2-3)
Hamilton	• Environmental Studies • Development Charges	Not specified	No	Yes – reduces Tax Increment Grant	Up to 50% (maximum of \$20,000); maximum of 2 studies per property.
Niagara	• Development Charges	\$1.5 million (Regional DCs)	No	Yes – Region only	N/A

EMPLOYMENT CIP – OTHER PROGRAMS			
Market	Program	Maximum Amount	Additional Details
Hamilton	Office Tenancy Assistance Loan	\$450,000	<ul style="list-style-type: none"> • Applies to Downtown, BIAs, and Airport area • 0% interest loan • Up to 90% of leasehold improvement costs
Hamilton	LEED Grant	Not specified	<ul style="list-style-type: none"> • 50% of incremental costs for LEED standards • Percentage increases with increasing certification level

Eligibility for Employment Community Improvement Plan Programs

NORTH BAY	
Program Item	Details
Project Development	Development, redevelopment, rehabilitation
Access	First come, first served
Retroactivity	No – project cannot have commenced
Official Plan and Zoning	Must comply
Stacking	Tax Increment Financing can only apply through one CIP in cases where properties are in more than one CIP area
Annual Report	Yes
Application Fee	No
Grant Timing	One year after approval to submit documents to receive funds
Evaluation Criteria	Increase useable floor space by 25% (redevelopment, rehabilitation) OR have a substantial increase in floor space (undefined what “substantial increase” means)
SAULT STE. MARIE	
Program Item	Details
Project Development	Significant investment
Access	First come, first served
Retroactivity	No – project cannot have commenced
Official Plan and Zoning	No requirement
Stacking	TIF and Grant Funds can be stacked
Annual Report	No
Application Fee	No
Grant Timing	Must be submitted with application
Evaluation Criteria	<ol style="list-style-type: none"> 1. Targeted sectors must be export-based and focus on identified sectors. 2. Building and/or land-related investment must occur. 3. Economic criteria (permanent jobs, tax revenue, private sector investment, building permit value, need for City funds for project viability).

TIMMINS	
Program Item	Details
Project Development	Development, redevelopment, rehabilitation
Access	First come, first served
Retroactivity	No – project cannot have commenced
Official Plan and Zoning	No requirement – can apply for them and receive fee rebates
Stacking	TIF and Grant Funds can be stacked
Annual Report	No
Application Fee	No
Grant Timing	Must be submitted with application
Evaluation Criteria	None specified
THUNDER BAY	
Program Item	Details
Project Development	Aerospace development
Access	First come, first served
Retroactivity	No – project cannot have commenced
Official Plan and Zoning	No requirement
Stacking	N/A (it is one program only)
Annual Report	No
Application Fee	No
Grant Timing	N/A (it is only Tax Increment Financing)
Evaluation Criteria	Measurable public benefit
HAMILTON	
Program Item	Details
Project Development	Employment lands (part of the city-wide ERASE program)
Access	First come, first served
Retroactivity	No – project cannot have commenced
Official Plan and Zoning	Must comply
Stacking	Yes
Annual Report	No
Application Fee	Yes
Grant Timing	Upon approval
Evaluation Criteria	None specified for TIF; Office and LEEDing the Way is specific to those programs

NIAGARA	
Program Item	Details
Project Development	Employment lands in the Economic Gateway and Zone
Access	First come, first served
Retroactivity	No – project cannot have commenced
Official Plan and Zoning	No requirement
Stacking	Yes
Annual Report	No
Application Fee	No
Grant Timing	Upon approval
Evaluation Criteria	<p>Economic Performance:</p> <ul style="list-style-type: none"> Job Growth – more points awarded for more jobs Economic Performance – more points awarded for increased Construction value Maximum Total Points from adding Job + Economic Scores: 16 <p>Environmental Performance OR Smart Growth:</p> <ul style="list-style-type: none"> Based on LEED Certification OR Niagara Region's Smart Growth Criteria Maximum Points: 5

Summary Exhibit

SUMMARY EXHIBIT											
	Greater Sudbury	Barrie	Hamilton	Kingston	London	North Bay	Peterborough	Sault Ste. Marie	St. Catharines-Niagara	Thunder Bay	Timmins
Economic and Site Selection Factors											
Regional service centre	✓	✓	✓	✓	✓		✓		✓	✓	
"Gateway" to broader region	✓			✓	✓		✓	✓		✓	
Canada-U.S. border access/proximity			✓	✓				✓	✓	✓	
Natural resources key to economy	✓					✓		✓		✓	✓
Municipality owns employment land	✓		✓	✓	✓	✓		✓		✓	✓
Employment Land CIP			✓		✓	✓		✓	✓	✓	✓
Real Estate Cost Factors											
Industrial Land Cost – Ranked (Lowest = 1)	9	10	11	6	8	1	4	3	6	4	2
Development Charges – Ranked (Lowest = 1)	6	10	11	1	9	1	8	1	7	1	1
Property Tax Rate – Ranked (Lowest = 1)	11	1	8	6	4	2	3	9	5	7	10