

GO INVESTMENT CORRIDOR VISION

DRAFT: FOR DISCUSSION PURPOSES ONLY
Prepared Q2 2022

Burlington
ECONOMIC DEVELOPMENT

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GO INVESTMENT CORRIDOR VISION AT A GLANCE

VISION

Develop future-focused business environments that strengthen existing businesses, and attract new high-growth businesses and knowledge-based talent.

OBJECTIVES

1. Retain and integrate existing compatible businesses into the development of the MTSA.
2. Create an open business environment and foster growth opportunities that attract new businesses.
3. Develop an environment that attracts knowledge-based talent to work and live in Burlington.

Guiding Principle #1:

Develop each MTSA into a complete community that has a mix of residential, employment, institutional and recreational uses.

Guiding Principle #2:

Focus on planning for future services and infrastructure, and ensure sustainable development.

STRATEGIES:

1. Achieve true mixed-use environments that focus on substantial employment outcomes.
2. Create a sense of place and character appealing to the future workforce and demographic.
3. Foster small businesses, retail and other amenities that cater to the requirements of employers and employees.

STRATEGIES:

1. Develop a joint phasing and servicing strategy with the Region and other partners.
2. Integrate smart city infrastructure into the development of the MTSA
3. Encourage sustainable forms of development in the MTSA.

Guiding Principle #3:

Develop a unique identity for each MTSAs and a marketing brand focusing on attracting people and talent to the area.

STRATEGIES:

1. Enhance the existing heritage, cultural and natural features in the MTSAs.
2. Develop a unique place identity for Burlington based on its unique characteristics.
3. Develop an employment attraction strategy to attract talent and investment in the MTSAs.

Guiding Principle #4:

Identify key employment growth areas in the MTSAs and market to the future workforce and industries.

STRATEGIES:

1. Strengthen key employment sectors.
2. Diversify the economy by encouraging external businesses to locate in Burlington.
3. Attract and retain talent desired by key employment sectors in the MTSAs.

Guiding Principle #5:

Integrate the MTSAs into the city fabric and provide seamless transportation connectivity.

STRATEGIES:

1. Encourage alternative modes of transportation in partnership with government agencies.
2. Advocate for active modes of transportation.

Guiding Principle #6:

Engage stakeholders to develop a collaborative implementation plan for the GO Investment Corridor Vision.

STRATEGIES:

1. Consult with stakeholders who are involved in or impacted by the development of the MTSAs.
2. Develop effective tools and strategic partnerships to address barriers in the implementation of the GO Investment Corridor Vision.

OVERVIEW OF THE GO INVESTMENT CORRIDOR

With more millennials entering the workforce and increased immigration in the Greater Toronto and Hamilton Area (GTHA), the industrial, office and retail markets' requirements are continuously changing. Workers seek culturally rich areas that offer a range of amenities and activities for people of all ages to provide them with work/life balance. Employers also seek to locate in or have access to such areas to retain a talented and diverse workforce. Burlington needs to distinguish itself as a desirable place for workers and employers to live, work and invest in the city. Although Burlington was given the titles of Best Community in Canada and the Best City to Raise a Family by Maclean's magazine in 2019, Burlington faces significant competition from other municipalities in the GTHA when it comes to economic growth. Employers in Burlington face a number of challenges, including a lack of developable land, limited access to transit, and lack of affordability among others, all of which this vision aims to address.

One of the greatest challenges in Burlington is the limited supply of greenfield land for development. In order to sustain economic growth while protecting our natural heritage, Burlington must intensify development in designated areas. One of the ways in which the city plans to accommodate development in the future is by developing compact, mixed-use urban areas around the GO transit stations along the QEW highway.

Much of Burlington's vacant and developed employment land is located north and south of the QEW highway, and is referred to as the GO Investment Corridor in this document. The areas around the three GO transit stations; Aldershot GO, Burlington GO and Appleby GO are referred by Metrolinx as Major Transit Station Areas (MTSAs) in The Growth Plan (2019).

Each MTSA covers an area of approximately 800 meters around the GO stations. The City has been working on developing Area Secondary Plans (ASPs) for these areas. The plans for the MTSAs will be aligned with the Province of Ontario's growth plan, A Place to Grow: Growth plan for the Greater Golden Horseshoe, and the Halton Regional Official Plan.

Burlington will take advantage of Metrolinx's planned Regional Express Rail, featuring two-way, all-day service every 15 minutes along the Lakeshore West line to develop the MTSAs into mixed-use areas that are environmentally friendly, infrastructure-efficient, walkable, bikeable and transit-oriented.

Through this process, Burlington Economic Development will set specific employment targets for employment lands converted to allow mixed land

uses. The predetermined targets will aim to achieve higher employment density or better employment outcomes than the existing state of converted mixed-use sites. Burlington Economic Development will also develop a business brand and marketing strategy attractive to 21st century businesses, aim to retain and integrate existing businesses, and to identify and implement tools to address key constraints in economic development.

The preliminary technical work conducted by the City in 2021 illustrates that there is a potential to add over 60,000 jobs in Burlington through the development of mixed-use, transit-oriented neighbourhoods around the GO stations. Burlington Economic Development plans to take advantage of this opportunity to derive positive economic outcomes for everyone in the City and attract the types of jobs and amenities that are desirable for these areas. With the redevelopment of Burlington, there comes an opportunity to competitively position the city within the GTHA as a top location for talent and business.

The City of Burlington has a dedicated team working on the ASPs and implementation strategies. The team conducted technical work in 2021 to determine the projected jobs, population and development density at full build out for each of the GO station areas. The following are the findings from the technical work:

ALDRSHOT GO MTSA

The Aldershot GO MTSA has an area of 129 hectares. The area is bounded by Highway 403 to the northwest, Plains Road to the southeast, Daryl Drive to the southwest, and is just northeast of Gallagher Road. The technical work projects that the Aldershot GO MTSA is projected to have capacity for 24,269 new people and

10,401 new jobs or a total of 34,670 people and jobs and a gross density of 200 people and jobs per hectare, resulting in a population to employment ratio of 2.3:1.




BURLINGTON GO MTSA

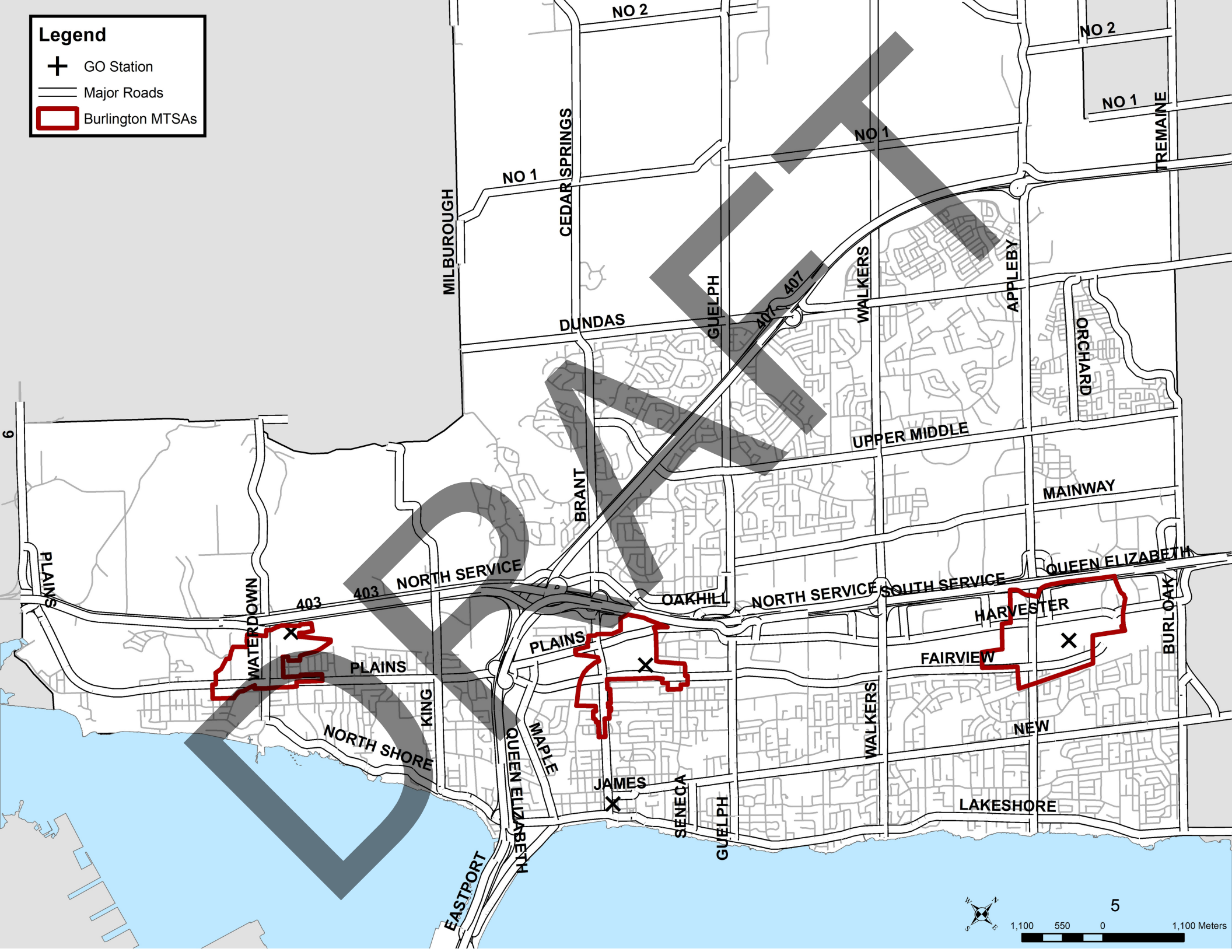
The Burlington GO MTSA has an area of 97 hectares. It is located south of Highway 403, along Brant Street and extends along the Fairview Street corridor and north along Queensway Drive. The Burlington GO MTSA is projected to have capacity for 20,362 new people and 8,727 new jobs or a total of 29,089 people and jobs and a gross density of 208 people and jobs per hectare. This results in a population to employment ratio of 2.3:1.

APPLEBY GO MTSA

Centered around the Appleby GO station, the Appleby GO MTSA has an area of 207 hectares. The area is south of Highway 403, along Appleby Line and extends along the Fairview Street corridor and north along Queensway Drive. The Appleby GO MTSA is projected to have capacity for 10,452 new people and 41,807 new jobs or a total of 52,259 people and jobs and a gross density of 149 people and jobs per hectare. This results in a population to employment ratio of 0.25:1.

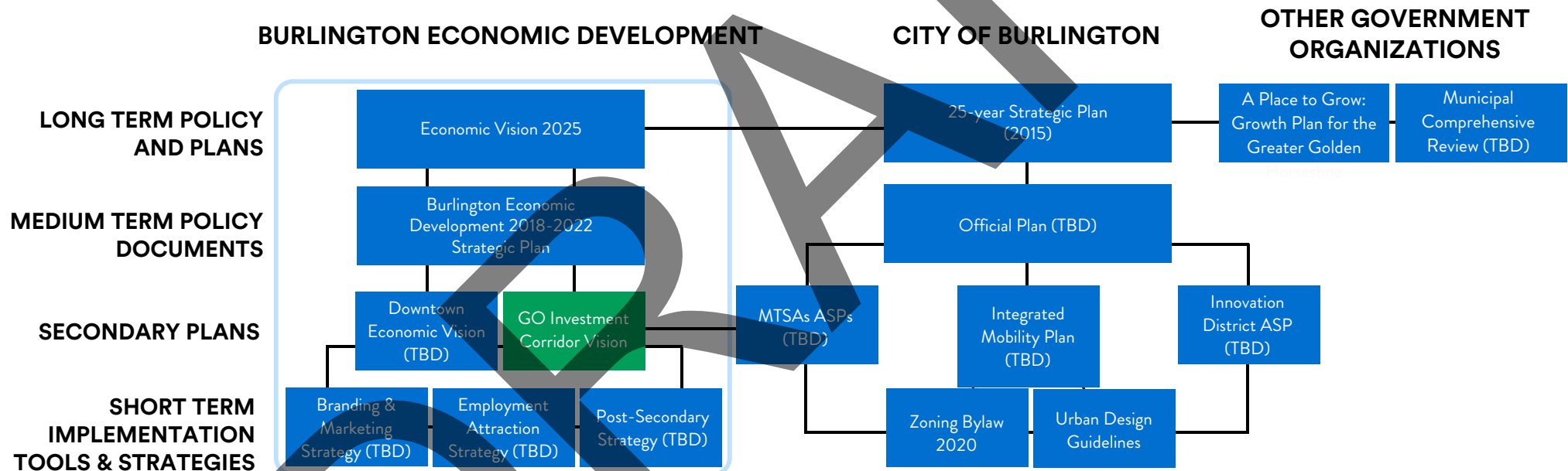
Legend

-  GO Station
-  Major Roads
-  Burlington MTSAs



5
1,100 550 0 1,100 Meters

POLICY FRAMEWORK



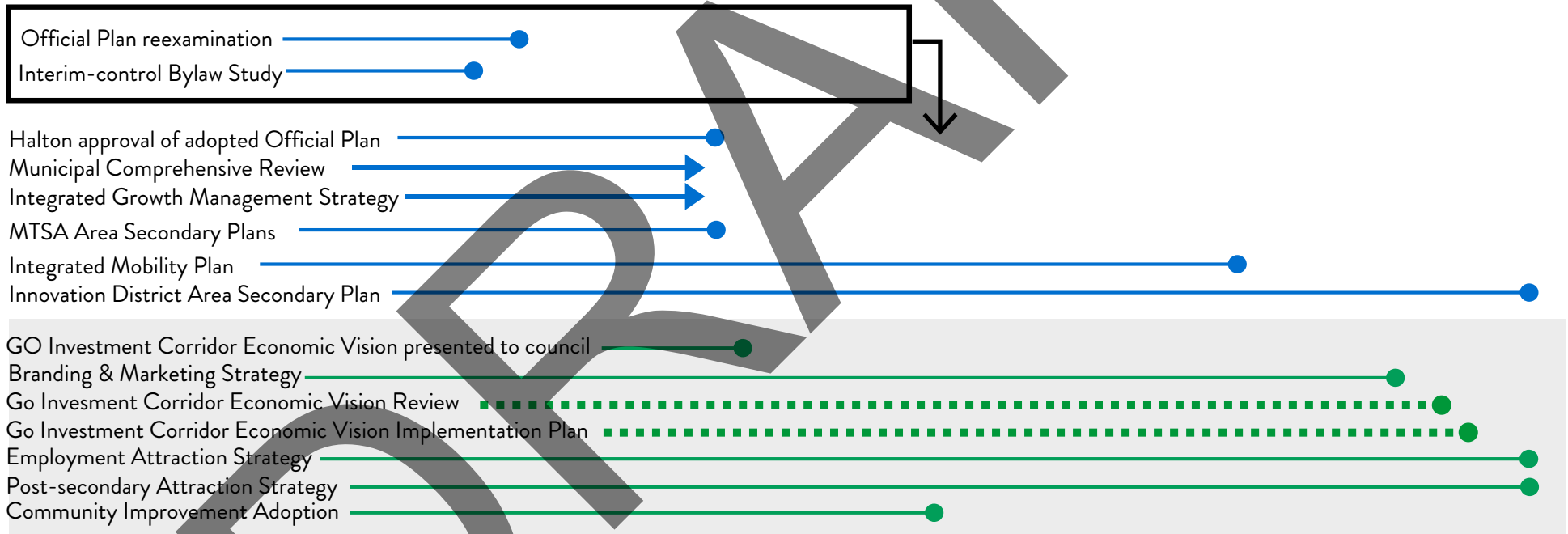
POLICY FRAMEWORK TIMELINES

2022

2023

2024

2025



OVERVIEW OF FOUNDATIONAL STUDIES

Burlington Economic Development retained consultants to conduct a number of studies. The ongoing work from the studies has been integrated into this vision. An overview of the studies is below and a summary and key themes emerging from the studies is provided in a subsequent section of this document.

BURLINGTON & GTA SUBURBAN OFFICE MARKET ANALYSIS

DELOITTE, 2016

This study analyzes the suburban office market in Burlington, focusing on the market context, financial implications and policy. The study also provides an overview of workplace transformation and potential growth scenarios for Burlington.

BURLINGTON OFFICE AND RETAIL MARKET ANALYSIS STUDY

DELOITTE, 2019

This study provides an update on current office and retail market conditions and performance, and market trends that may impact future demand and supply. Also reviewed in this study are office market trends driving potential growth for Burlington, as well as experiential and placemaking elements that would elevate and complement other developments with a focus on the three GO train stations.

FUTURE TRENDS OF INDUSTRIAL DEVELOPMENT- BURLINGTON & WEST GTA

DELOITTE, 2019

This study identifies current and future types of employment uses that can be attracted to and retained by the City of Burlington, for the employment lands strategy as well as in mixed-use areas.

BURLINGTON EMPLOYMENT TARGETS STUDY WATSON & ASSOCIATES, 2019

This study explores long-term employment growth and non-residential development potential in the areas surrounding the three GO train stations in Burlington by sector and examines the intensity of development that should be targeted based on market-based analysis.

FUTURE OF WORK

BURLINGTON ECONOMIC DEVELOPMENT, 2021

This study outlined the short term to long term impacts of COVID-19 on the industrial, office and retail markets in Canada and compared these national trends to the markets at the local level in Burlington. This study also analyzed current trends driving change in these markets.

| VISION

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OBJECTIVES

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PROCESS

1. PRELIMINARY RESEARCH & ANALYSIS

Burlington Economic Development reviewed the technical work and background research conducted by the City of Burlington, and analyzed previous work conducted internally on economic trends in Burlington. Burlington Economic Development retained consultants to conduct research on industrial, office and retail market trends, employment density and targets, and the types of employment uses that would be compatible within the MTSA's. Burlington Economic Development also began researching case studies of successful mixed-use environments focusing on employment uses. Burlington Economic Development identified key stakeholders within the MTSA's to engage in the process.

2. CONSULTATION & ENGAGEMENT

The consultation and engagement was conducted in two phases. In the first phase, Burlington Economic Development interviewed market stakeholders, including developers, land owners, existing businesses in the MTSA's, and realtors. In the second phase, Burlington Economic Development interviewed key partner stakeholders, including but not limited to city and regional partners, transportation agencies, real estate and housing associations, and infrastructure providers. Burlington Economic Development will work with the City of Burlington to conduct public engagement in 2020. The phasing of the consultation allowed Burlington Economic Development to note key differences and similarities in the vision for the MTSA's between the market and partner stakeholders.

3. PLANNING & VISIONING

Burlington Economic Development formed a subcommittee to help guide the economic vision and implementation plan for the GO Investment Corridor. The subcommittee included the organization's board members, as well as real estate, urban planning, human resources, and technology experts. Burlington Economic Development also conducted a SWOT analysis and analyzed themes emerging from stakeholder interviews.

4. DEVELOP DRAFT GO INVESTMENT CORRIDOR VISION

Based on the feedback and findings from foundational studies, Burlington Economic Development developed a draft vision and guiding principles.

5. RECOMMENDATIONS & STRATEGIES

Burlington Economic Development developed a list of key recommendations and strategies that can assist in the implementation of this vision.

6. IMPLEMENTATION

The development of the implementation plan will commence following the completion and adoption of the MTSA's ASPs at the end of Q2 2022.

TIMELINES

INITIAL PHASE 2018-2020

- ✓ **Preliminary Research & Analysis**
Conduct research on economic conditions and case study analysis to help form the GO Investment Corridor Vision
- ✓ **Preliminary Consultation**
Conduct one-on-one interviews with industry and institutional stakeholders
- ✓ **Planning & Visioning**
Form subcommittee and regularly meet with City Building staff to help guide the vision and receive feedback
- ✓ **Develop go investment corridor vision document**
- **Project Pause: 2020 Q2**

2018

Q3

Q4

2019

Q1

Q2

Q3

Q4

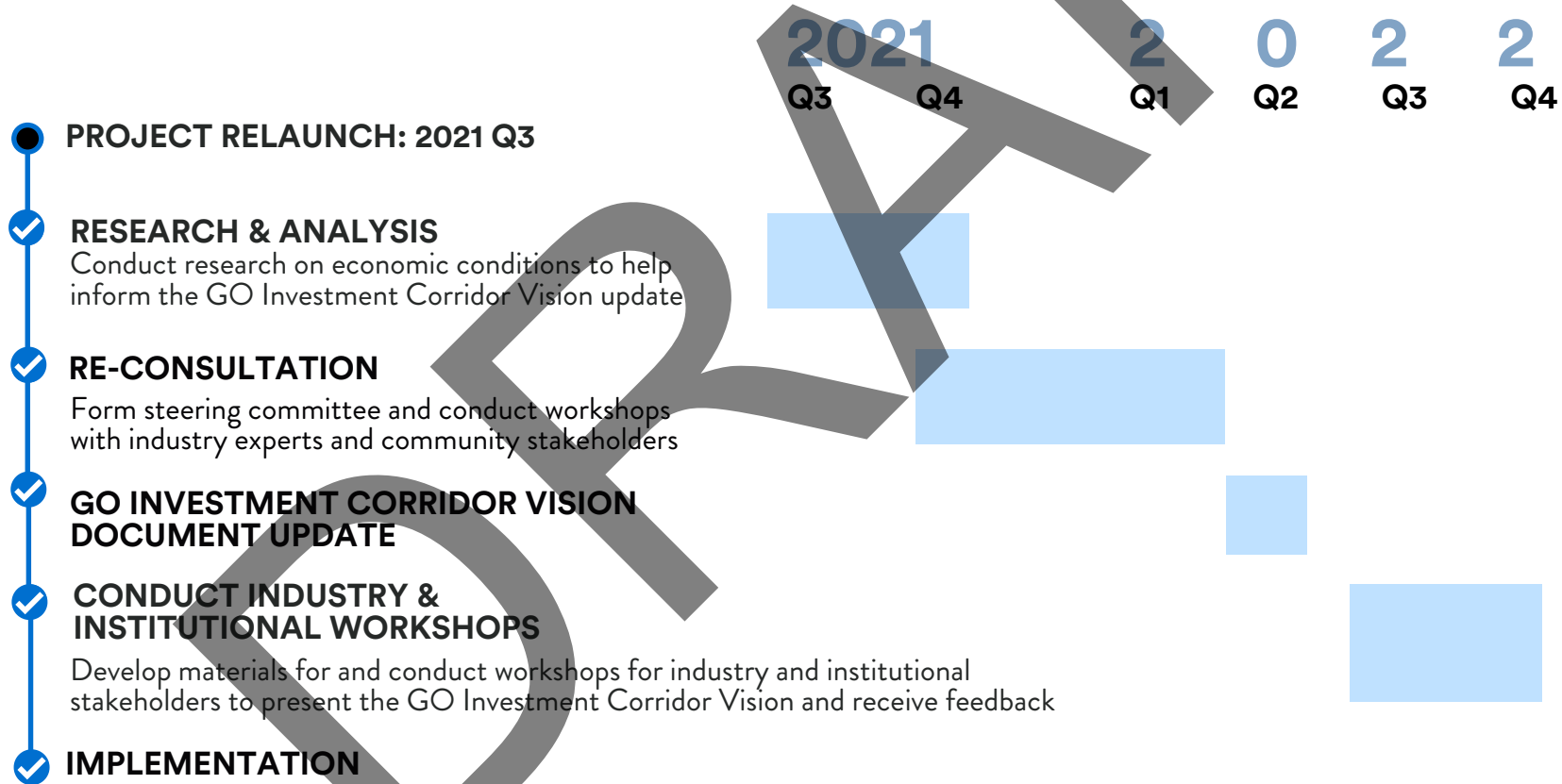
2020

Q1

Q2

PROJECT RELAUNCH 2021

The COVID-19 pandemic has had a profound impact on the business community and the real estate market in Burlington. Throughout the pandemic, some of the trends previously captured through the initial study conducted between 2017-2019 were enhanced, or catalyzed by the pandemic, and there were new trends introduced within this timeframe as well. In order to gain a full understanding of the changes at the local level, Burlington Economic Development conducted in-house research, engaged with community stakeholders, and formed a steering committee of industry experts. The following sections cover the findings and key messaging arising from these activities. Below is a project timetable for the 2021-2022 phase of the project.



SWOT ANALYSIS

- Connectivity to Toronto
- Strong Interest from residential market
- GO Train all-day service
- Proximity to highways
- Existing residential/amenity connectivity
- Appeal to knowledge-based businesses/office uses
- Appeal to commuters living in Burlington
- Ability to draw talent from Niagara to Toronto

STRENGTHS

- Lack of current onsite amenities
- Parking will be too low for current office market
- No highway visibility for employers
- Lack of employment vision
- Market is unclear on employment vision
- Lack of market vision for industrial development
- Lack of connectivity is impeding multi modal transit
- Regional transit connectivity is only focused East, not West or North
- Won't currently have the population density to support services and amenities
- Unstable policy and political climate
- Uncertain public perceptions and support

WEAKNESSES

- Create amenity-rich, connected employment areas that appeal to future employers
- Redevelop existing uses to create better employment outcomes
- Define the types of employment uses desirable for Burlington
- Utilize new technology and innovative design
- Create population/job intensification that will allow transit to function efficiently
- Create an implementation team to support the development of the MTSAs
- Zoning review and special permit/processing area
- Develop the MTSAs as new focal points that draw people to the area
- Branding and employment attraction

OPPORTUNITIES

- Rising prices per acre for employment land
- Majority of developers are residential without experience/vision for employment
- Displacement of industrial
- Jobs may be replaced with like for like i.e. retail and service jobs
- Ministry of Transportation Ontario and Canadian National Railway approvals
- Industrial operations moving out/recognize limited lifespan in mixed-use areas
- Business cycles
- Environmental constraints can delay development
- Industrial uses that are incompatible may not be willing to move out
- Competition from other areas
- Low demand for office development due to remote working

THREATS

STRENGTHS

One of the major strengths of the MTSA is their connectivity and easy access to Toronto. With scheduled improvements to the GO network by Metrolinx, including frequent all-day service, transit users will be able to travel to and from Toronto faster and more conveniently. The strategic location of the GO infrastructure provides the city with connectivity not only to Toronto, but also to the Niagara area, allowing Burlington to attract talent from both regions.

The GO connectivity is beneficial to commuters in Burlington who work outside the city as it can provide them with convenient alternative transportation options. The proximity of the GO transit stations to the QEW is attractive to knowledge-based businesses and provides employees with easy transportation access. The ability to attract people from across the region and the appeal of the MTSA to the emerging workforce demographic will attract companies to the MTSA, particularly companies in the knowledge and professional services industry. The MTSA are not only attractive locations for employers, but also for residential developers. There is a strong interest in the MTSA from the residential market because of the land values and location factors. The residential development in the MTSA will be well-connected to surrounding amenities and employment uses, as well as an efficient regional transit system.

WEAKNESSES

One of the biggest weaknesses of the MTSA, from an employment perspective, is that there is a lack of vision for employment uses from the current market. The market shows strong interest in residential development, causing an increase in land values that may be too steep for employment uses. The lack of highway visibility in some locations may also discourage businesses who are focused on the prestige of highway visibility for their business.

Although developers are willing to engage in discussions on integrating employment uses within mixed-use developments, they are unclear of the employment vision. The current vision and policy are unclear in defining the desired employment uses within the Investment Districts, and the type of development that would be supportive of such uses. Currently, the Investment Districts are lacking amenities, including public open spaces and service commercial uses. The existing population density in the districts is not enough to be supportive of the required services and amenities for the future demographic that the city desires to attract to the districts.

Although one of the strengths of the Investment Districts is the GO transit connectivity, it is a regional service that is not well-connected to the local transit network. The regional GO transit is also focused on the eastern

connection to Toronto and does not provide the same level of connection West of Burlington. The local transit network is highly disconnected from a regional perspective, particularly to the North of the city with no connectivity to Milton.

Regional transit must be better connected and more efficient to provide transit users access to the GO transit stations and to other key locations within the city to minimize car use.

The parking within the MTSA is too low for the current office market. GO transit is a viable option for employees, but since the service is not fully integrated with local transit, it causes commuters to rely on automobile use. Due to the increasing land values within the MTSA, providing parking will become increasingly expensive with the need to move to structured parking.

OPPORTUNITIES

The MTSA presents a significant opportunity for Burlington's future growth and development. The MTSA will create opportunities for intensification and mixed-use development that is well-connected by way of transit. The MTSA can accommodate and support a well-functioning transit system through policies to intensify population and

employment growth. The MTSA can be developed into new neighbourhood focal points within the city that are attractive to residents, visitors and employers. Furthermore, they can support amenity-rich areas that appeal to future employers, integrating service commercial uses and spaces for public interaction.

The redevelopment of the MTSA provides an opportunity to incorporate smart city elements, such as new technology and innovative design, that enhance the quality of life and improve efficiency and sustainability.

There is an opportunity to redevelop existing uses in the MTSA to achieve better employment outcomes by clearly defining the desired future employment uses for the areas. One of the biggest opportunities to ensure that the GO Investment Corridor Vision is inclusive of employment uses is the zoning review of the current zoning by-law, which will take place at the end of 2022. The zoning review will allow for policy changes that better represent the future vision for the MTSA. Policies that encourage desirable employment uses and discourage undesirable uses for the MTSA can be recommended through the zoning review.

The implementation of the MTSA could be supported by appointing an independent team that assists with the development within

the MTSA's and by designating specific zones within the MTSA's that allow for a special permit process for desired uses.

The MTSA's represent a significant opportunity from a branding and employment attraction perspective. The MTSA's will create a new urban-suburban employment environment with many of the features typically found in a downtown core, not a suburban office environment. Burlington is in a competitive position in which it can create well-connected, amenity rich employment areas within the MTSA's at a lower cost and with less transportation congestion than Downtown Toronto.

BARRIERS

One of the biggest barriers to the development of the MTSA's from an employment perspective is the rising price per acre for land. The increasing land values are not affordable for industrial businesses and presents a potential barrier to the current employment uses within the MTSA's. Many of the existing businesses may be forced to move outside of the MTSA's to other parts of Burlington, or to other cities. Residential land development within the MTSA's may displace industrial businesses, including some key employers, to other areas.

The majority of the developers within the MTSA's have a focus

on residential development and have limited vision and experience in relation to employment land development. Their lack of vision and experience in employment development may be another factor that leads to the loss of employment uses within the MTSA's as they may convert them into bedroom communities. Industrial businesses within the MTSA's recognize their limited lifespan and are preparing to move out of the MTSA's, except for the Appleby MTSA. There is a danger of the employment uses within the MTSA's being replaced with commercial and service-based jobs versus professional services and knowledge-based jobs.

External development approvals and requirements may present a barrier in achieving development. The Aldershot MTSA is near the QEW and subject to MTO authority. CN Rail requirements for development may also present a barrier and must be better understood.

Integrating employment uses within mixed-use developments or near residential developments, can cause concerns from residents. Another barrier for employment uses within the MTSA's may be the nature of business cycles. Depending on the timeline of development and how it coincides with the various stages of the business cycle, businesses may not be able to integrate well into the MTSA's. The changing nature of business cycles can prevent developers from successfully attracting the desired employment uses within mixed-use developments.

CASE STUDIES

EMPLOYMENT AREA REVITALIZATION



MIXED-USE EMPLOYMENT



STRATEGIC POLICIES



**PARTNERSHIPS &
INNOVATIVE TOOLS**



**WORKFORCE
ATTRACTION**



**BRAND
IDENTITY**



INVESTMENT ATTRACTION & REVITALIZATION



EMPLOYMENT AREA REVITALIZATION

After the bombings during World War II destroyed the London Docklands, the area was abandoned and empty until the beginning of the 1980s. However, the area still possessed many advantages that made it an attractive development opportunity. The London Docklands were located close to the city, meaning the population would eventually flow into the area, providing opportunities for real estate and business development. The transit in the area was also being improved through extensions of the London underground trains and a new airport.

To further escalate this growth, the London Docklands Development Corporation (LDDC) was created in 1981. In order to rebuild the area into a thriving economic hub, the LDDC focused on two main areas - the first, to provide the area with access to basic utilities and services such as gas, electricity, roads, and sewage, and the second, to rebrand the area to attract people based on its history, location and culture. The LDDC was given three powers to regenerate the area - power of land assembly (power to take land from public bodies without public inquiry), power to control development within three boroughs, and the power to spend government grants to prepare land for development. Instead of creating a plan, the LDDC relied on market-driven development. In 1982, the government designated an area of the Isle of Dogs as an Enterprise Zone. Enterprise Zones were incentivized to attract investors and developers into the area. Some economic incentives included a relief period for taxes, offsetting rights, and



more. Initially, the local government's efforts were seen as inefficient and their planning powers were transferred to the LDDC. However, they quickly realized that successful regeneration of an area requires the involvement of the local community and authority, and they shifted to a collaborative partnership approach.

Key takeaways:

- The public sector alone was not able to successfully revitalize the docklands area, thus creating the London Docklands Development Corporation (LDDC). The LDDC utilized a market-based approach to attract private investment, which spurred development initially, but the market was not easy to control. Partnerships between the public and private sector led to the successful revitalization of the docklands.
- The development corporation's ability to acquire land, combined with offering financial incentives and flexibility to the private sector allowed for the area's economic success.

EMPLOYMENT AREA REVITALIZATION

With a population of approximately 323,223 in 2015, Vaughan has been steadily growing at an average rate of 11% per year. The city has been working on implementing an ambitious economic development plan focused on bringing in new residents through creating a lively work and family-friendly environment. The official plan for the city focuses on the revitalization of the city centre to attract a larger and highly diverse workforce. Vaughan's emerging downtown, also known as the Vaughan Metropolitan Centre (VMC) is to be the center of finance, innovation and culture for the City. The plan for the VMC includes the development of several new cultural, retail, civic, and green spaces --a tactic to bring people into the city for enjoyment. Pedestrian shopping areas, cycling paths, as well as urban squares will also be created to enhance the city's culture and attract visitors. By 2031, the VMC will have 12,000 residential units, bringing in 25,000 new residents, 1.5 million square feet of commercial office space, and 750,000 square feet of new retail space.

The VMC contains a Metrolinx-designated MTSA within its boundaries, which the city has divided into sub-districts based on the unique characteristics associated with each area. The MTSA is the primary connector for the VMC, which accommodates large volumes of transit and pedestrian activity. Transit users have access to multiple modes of transit. Creative wayfinding programs, public art, retail uses, and interactive public space animation are planned for the VMC MTSA to



create a unique experience for travelers. The City is developing unique programming for each sub-district of the mobility hub.

The City conducted a Community Improvement Plan (CIP) study, which was adopted by Council in 2015. The CIP is focused on attracting and supporting office development in key designated areas in Vaughan and in particular, the VMC. The financial incentives recommended in the CIP included Development Charges (DC) Grants/Reductions; Tax Increment Equivalent Grants; and Cash-in-Lieu of Parkland (CIL) Reductions.

The Toronto-York Spadina subway has contributed to the growth of the downtown Vaughan area by attracting a number of well-known professional and technical service offices. With large offices of firms such as KPMG and PwC moving into the area, Vaughan has set the stage to become an attractive city for office employment.

Key takeaways:

- The VMC has leveraged its location as a transit hub by improving access to the GTA, as well as a range of attractions for travelers.
- Vaughan's adoption of a CIP to encourage office development in a competitive region has successfully attracted some major offices.

MIXED-USE EMPLOYMENT

Located adjacent to Silicon Valley in the Greater San Francisco Bay Area, Pleasanton has a population of approximately 83,000 people. In the past, the City had a reputation as a bedroom community, but has successfully transitioned to a "job-surplus" community by designating employment and commercial areas in the form of business and office parks in the 1980s.

The development of Hacienda Business Park in the early 1980s represented Pleasanton's largest employment centre. It is an 860-acre master-planned complex of office space and ancillary commercial uses. The business park has also grown to include four retail centres and residential uses, allowing for a mixed-use office environment.

Key takeaways:

On-site childcare facilities and schools are also provided, improving convenience for parents working within the business park. Hotels, conference facilities, health clubs, and open spaces also support attraction of businesses, paired with local and regional transit connections to provide additional access to markets, labour, and air and water ports.

- Instead of developing standalone office buildings, a mixed-use approach to development was utilized, which focused on on-site amenities for employees, contributing to its success.



MIXED-USE EMPLOYMENT

There are very few case studies that are successful examples of mixed industrial and residential use development. The WorkSpaces in Strathcona Village is one of the few unique precedents of a mixed-use residential and industrial development. The development is comprised of 350 residential units and over 60,000 sq. ft. of space on the lower levels for light industrial uses. These spaces are dedicated for light industrial uses and can be utilized as creative space for artists and small industrial start-up businesses. The units are zoned CD-1, which allows general manufacturing, wholesaling, offices, and retail uses.

Strathcona Village is a district located in downtown Vancouver and the WorkSpaces are one of the largest redevelopment projects in the area. It is also amongst the first major projects in the region to incorporate industrial space as part of mixed-use development. The residential towers extend up to 15 storeys, and the development includes extensive outdoor amenity spaces located on the rooftop of the podium.

Key takeaways:

- The development blends elements of industrial design with streetscaping and design elements that make the development more liveable.
- Smaller industrial units and flexible zoning that also incorporates convenience and service retail uses reduces negative public perception.

THE WORKSPACES, VANCOUVER, BC



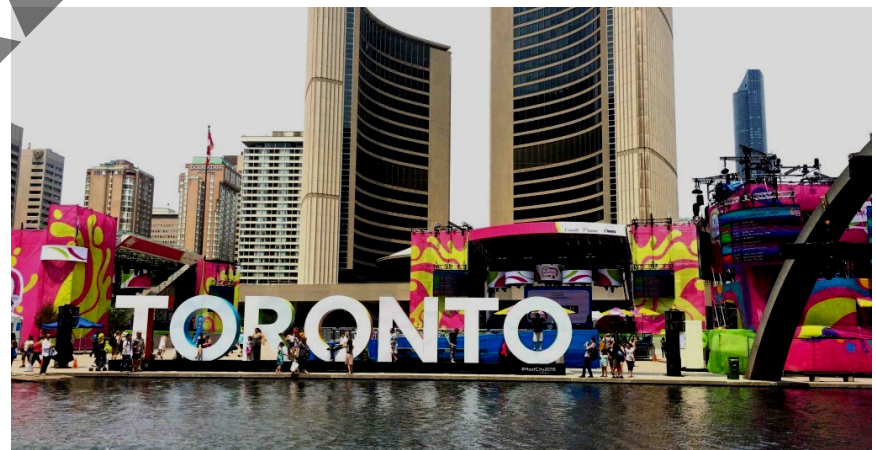
STRATEGIC POLICIES

The City of Toronto's updated Development Charges (DC) bylaw was approved by Council in 2018. The bylaw was renewed as a result of a comprehensive review process. The city began collecting data for proposed DC calculations in 2017, and conducted a background study, which involved stakeholder and public engagement.

There are a number of exemptions from the bylaw. DCs are not imposed for the intensification of small residential housing. There are also exemptions for hospitals, worship facilities, temporary sales offices and land used for colleges or universities. Initially, industrial and commercial uses were being considered for removal from exemptions, but were maintained in the updated bylaw. However, not all commercial development is exempt, such as stand-alone office buildings. Non-residential DCs may still apply to some commercial developments. Aside from exemptions, the updated bylaw increases DCs over a two-year period. This phased approach is beneficial for projects requiring significant upfront capital.

Key takeaways:

- Phased DCs allow developers to adjust to increases more gradually.
- Exemptions for industrial uses and office uses (not including stand-alone office buildings) encourages mixed-use development.



STRATEGIC POLICIES

A development permit system (DPS) is an optional land use planning tool available for municipalities. The DPS streamlines zoning, minor variances and site plans into one approval process; this provides flexibility in allowing for discretionary uses subject to specified criteria and allows for variations from development standards within specified limits. Municipalities can impose a range of conditions on the issuance of a development permit through a DPS bylaw.

The City of Brampton established a Development Permit bylaw which came into force in 2015 for an area along Main St. N., identified as a distinct "Character Area" within the downtown. The area is transitioning towards a mixed-use neighbourhood. Most of the development in this area is expected to occur within or as additions to existing buildings. The bylaw guidelines for new development to maintain the area's character, support a mix of uses, provide streetscape improvements, and support transit ridership and pedestrian activity. The downtown is identified as an Anchor Hub in the Greater Toronto & Hamilton Area (GTHA) by Metrolinx.

Key takeaways:

- The Main St. N. Development Permit bylaw combines zoning, site plan and minor variance approvals into a single approvals procedure, and allows for development to be expedited.



| PARTNERSHIPS AND INNOVATIVE TOOLS

Markham is recognized as one of Canada's high-tech capitals, with globally competitive professional services. Markham has over 1,000 high-tech and life sciences companies generating 37,000 jobs. The visioning for downtown Markham began with recommendations and input gathered from an extensive consultation process between 1992 to the present. The visioning for the area was conducted in collaboration with the private sector. The City of Markham partnered with the Remington Group, a local land developer for the long-term vision for the downtown to create shovel-ready land. At full build-out, downtown Markham will have 3.7 million square feet of premium office space, 2.4 million square feet of award-winning retail space, and the largest number of mixed-use LEED-certified buildings in North America. The City has also formed partnerships with three sister cities and 11 friendship cities, and economic alliances with two municipalities and 7 educational institutions, which attract foreign residents and investment to the city. A post-secondary strategy was also developed for Markham to attract a satellite campus of York University, which is expected to contribute to Markham's knowledge economy and global innovation.

Key takeaways:

- The links between Markham and its partner cities has resulted in significant international interest to live and invest in Markham.
- Downtown Markham has been the result of long-term planning, visioning and collaboration between the public and private sectors.

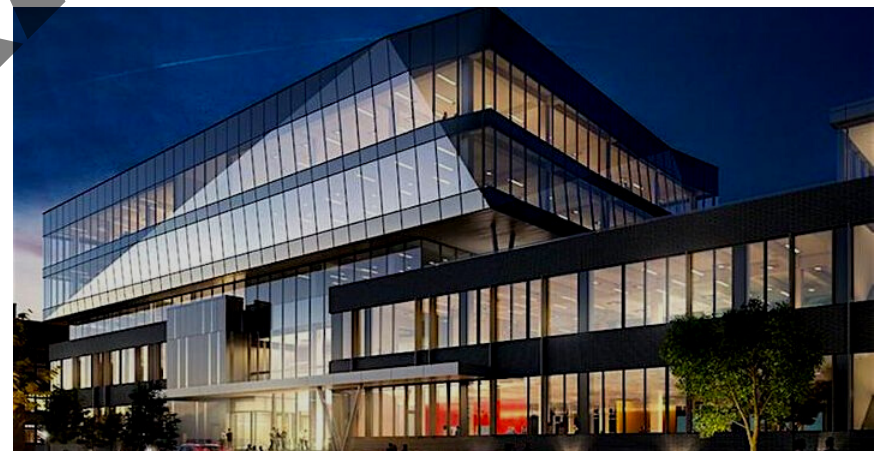


| PARTNERSHIPS AND INNOVATIVE TOOLS

Downtown Kitchener began to decline in the late 1950s and early 1960s, as people began moving to new suburban residential areas. Industries, businesses and retail followed to the periphery. The City, in response to these changes, began initiating downtown revitalization strategies in 1963. Initial strategies included urban renewal projects such as the pedestrianization of the Central Business District for the summer months and the creation of a mini-mall in the late 1960s. It wasn't until 2003 that Kitchener began to see some success in its revitalization strategies. In 2003, the City made the decision to shift its economic development focus to the downtown.

In 2004, the City of Kitchener established a 10-year, \$110 million Economic Development Investment Fund (EDIF), which was funded through a special 10-year capital levy. The fund, monitored by an EDIF Steering Committee, was able to deliver several projects to the Kitchener and Waterloo area. The pharmacy school, the Wilfrid Laurier University graduate School of Social Work on Duke Street, the Downtown Community Centre, redevelopment of King Street, the redevelopment of Hall's Lane, Centre Block, Communitech, the central library expansion, and the medical school all benefited from the EDIF fund. The University of Waterloo School of Pharmacy was an EDIF funded project as well, and it achieved several indirect benefits achieved for the community. This includes medical school students training in the community, several pharmacies, clinics and health care teaching centres, as

DOWNTOWN KITCHENER, ON



well as an international pharmacy graduate program. Within two years of the EDIFs implementation, Kitchener was considered one of the fastest growing economies in Canada by CIBC and maintained the second lowest unemployment rate in Ontario, at 5.3% compared to the national average of 6.4%. The University of Waterloo has been a critical partner in the project to build a creative economy in downtown Kitchener. Its downtown campus has stimulated over \$200 million in private-sector investment and has set the stage for the long-term redevelopment downtown.

Key takeaways:

- Although a number of municipalities have implemented an EDIF, Kitchener is one of the most successful and unique examples. Kitchener leveraged its partnerships, land, financial investment, assets and real-estate.
- Kitchener also stimulated private-sector investment in the re-use of vacant and underutilized lands, and focused on creating both direct and indirect results for the community through its government processes.
- Much of investment in Kitchener has resulted from the attraction of post-secondary institutions and innovation hubs that foster start-up growth.

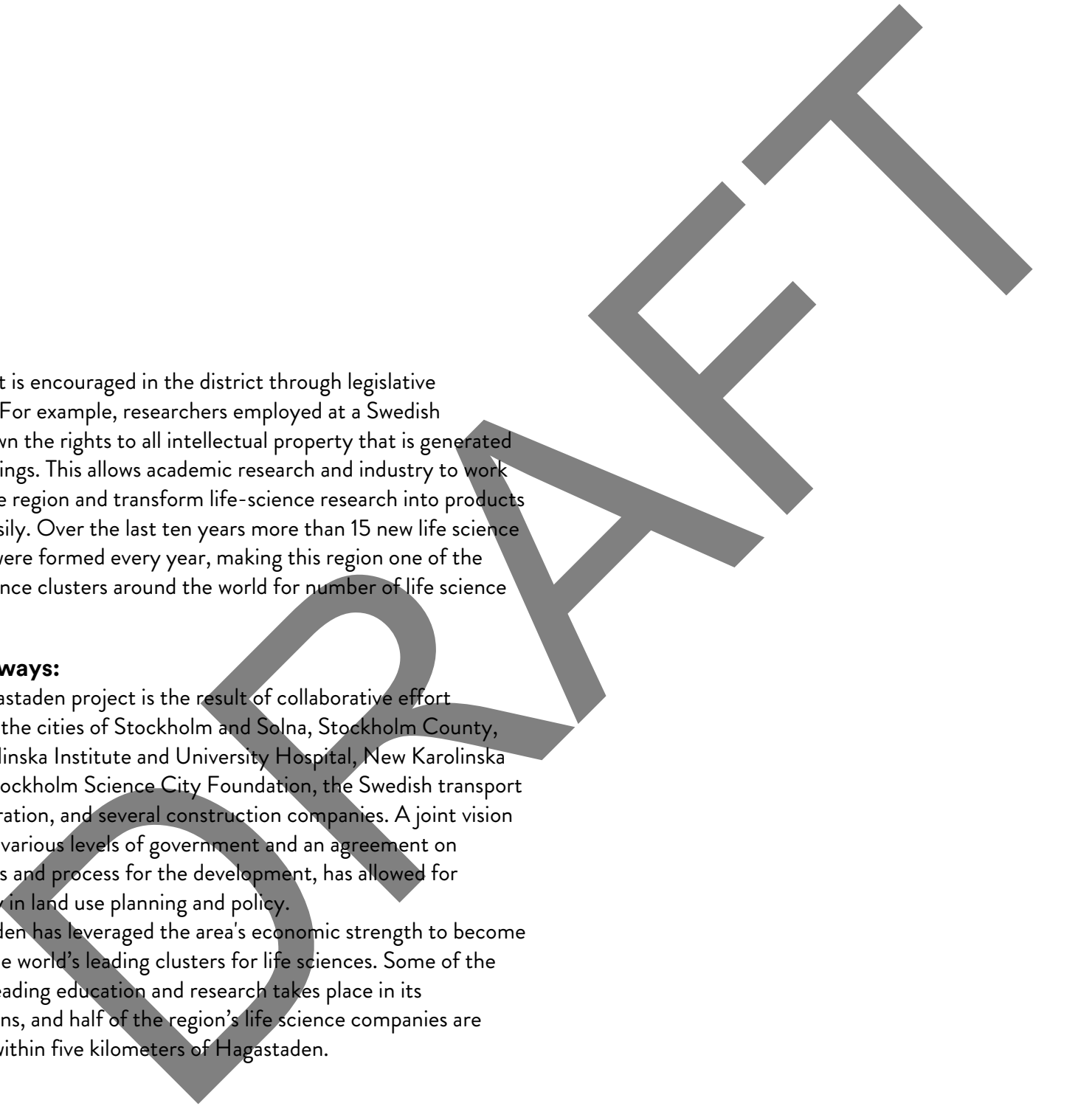
WORKFORCE ATTRACTION

Much like Burlington, Stockholm is facing development challenges due to the city's limited supply of land and is forced to grow vertically. Much of Stockholm's future growth is planned to occur in Hagastaden. The population of Stockholm is expected to exceed 1 million by 2020. Hagastaden, a municipal development project, is an important component for Stockholm's progress. It is a project that merges two cities, Stockholm and Solna, to create a cohesive development of homes and workplaces in strategic locations. The development includes a park over the railway lines in the region, which improves connectivity between the two cities.

Hagastaden is to become a vibrant inner-city district with 6,000 new homes and 50,000 workplaces. The area will extend the inner city and, at the same time, integrate Stockholm with Solna. By 2025, the area will be an entire new city neighbourhood, with a mix of housing, parks and knowledge-intensive industries. The construction period of Hagastaden spans 15 years and includes several large projects including the Norra Länken (the Northern link), the Stockholm City Line, the New Karolinska Solna University Hospital and the Karolinska Institute campus. Hagastaden is surrounded by a large concentration of scientific research and entrepreneurship within the field of life sciences.

Hagastaden is where researchers, universities, and companies of all sizes work together to develop innovative research and products. Research and





development is encouraged in the district through legislative advantages. For example, researchers employed at a Swedish university own the rights to all intellectual property that is generated by their findings. This allows academic research and industry to work closely in the region and transform life-science research into products relatively easily. Over the last ten years more than 15 new life science companies were formed every year, making this region one of the best life science clusters around the world for number of life science start-ups.

Key takeaways:

- The Hagastaden project is the result of collaborative effort between the cities of Stockholm and Solna, Stockholm County, the Karolinska Institute and University Hospital, New Karolinska Solna, Stockholm Science City Foundation, the Swedish transport administration, and several construction companies. A joint vision between various levels of government and an agreement on outcomes and process for the development, has allowed for creativity in land use planning and policy.
- Hagastaden has leveraged the area's economic strength to become one of the world's leading clusters for life sciences. Some of the world's leading education and research takes place in its institutions, and half of the region's life science companies are located within five kilometers of Hagastaden.

WORKFORCE ATTRACTION & RETENTION

One of the key focuses of Vancouver's Economic Development Plan for the city is on "People --Attracting and Retaining Human Capital". Vancouver competes for talent by working through Canadian expat organizations, such as C-100 in Silicon Valley to bring Canadians home, and works with partners such as Immigrant Employment Council of BC (IECBC) to attract and support skilled immigrants.

Another one of Vancouver's strategies involves a partnership with Campus-City Collaborative (C3) that creates opportunities to develop and retain talented students in the City. CityStudio is a project of the C3 that directly involves students in the process of solving city challenges in Vancouver's pursuit of its "Greenest City" goals. The program enrolls students from six post-secondary institutions and provides them with design thinking, dialogue and leadership skills. In its first year, CityStudio engaged 480 students across 12 disciplines in the participating institutions, contributing 20,000 hours of work towards the "Greenest City" goals.

Key takeaways:

- Participation in immigration programs and efforts to attract global mobile talent has positioned the city as a global competitor.
- Partnerships between post-secondary institutions and the city have created opportunities for professional and skills development, as well as providing the City with access to innovative research and ideas.

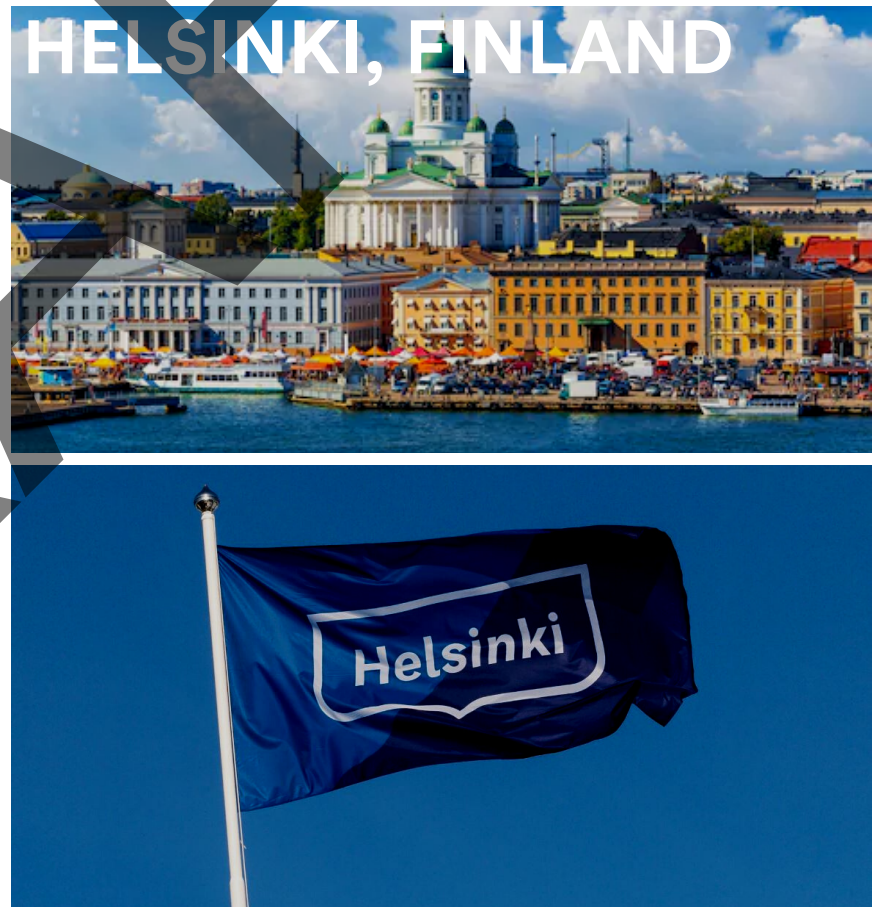


BRAND IDENTITY

Helsinki is a city that has gained many titles over the years. In 2000 Helsinki was chosen as the European Capital of Culture and in 2012 the city was chosen as the World Design Capital. Despite the various titles the city had gained, it had no uniform identity and city departments and projects used various identities and logos. Led by Werklig, a strategic brand design agency, Helsinki began developing a new brand identity in August 2017. Through the rebranding, Helsinki sought a fresh new identity that would respect its past and be both modern and timeless. Through the rebranding, the city's 200 logos were replaced by one unifying logo, which was used for everything from parking tickets to international marketing materials. The new logo was based on the well-known Helsinki crest, and was designed to be adaptive and responsive to various content. The target audience for the brand was everyone, including city employees, Helsinki residents, other Finns, foreigners, tourists and immigrants. Because of this, the new brand was developed to be flexible and memorable, and easy to use.

Key takeaways:

- For citizens and visitors the uniform brand makes for more understandable and resident-oriented marketing and communications from the City and its services.
- The new uniform identity also helps distinguish Helsinki from other cities and regions.



BRAND IDENTITY AND PLACEMAKING

Located in Charlotte, North Carolina, the expansive former-IBM campus had been neglected for a number of years before BECO Management (BECO) capitalized on the opportunity in 2010, and purchased the land. Soon after, BECO invested in rebranding the property as an “Innovation Park” through a \$100 million renovation strategy. By incorporating modern ways to foster an innovative, collaborative, and positive work environment into the old buildings, BECO built a community for businesses and their employees. Creating a workplace of the future that had a place for everybody to share ideas and do any kind of work they wanted involved spaces like a shared “Living Room”. BECO focused heavily on connectivity and creating experiences for workers by offering Wi-Fi throughout the campus, building an outdoor nature lounge, a massage center, hosting fitness center classes, and local food truck visits. Within 2.5 years, BECO Innovation Park hosted 7,000 employees, and raised the occupancy rate from just above 30% to 95%. Smaller companies with limited resources now have access to a workplace that accommodates their needs. Some notable tenants at BECO Innovation Park are Allstate, Wells Fargo, IBM, and Siemens.

Key takeaways:

- BECO's investment in placemaking for the area not only proved to be beneficial in securing top tenants, but the tenants also reported an increase in employee retention as a result of the work environment.



INVESTMENT ATTRACTION & REVITALIZATION

For many years, there was worry surrounding lack of activity and low foot traffic in the downtown area in Moncton, New Brunswick. The Downtown Moncton Centre-ville group, a local business association, advocated since 2005 for an events centre to improve the attractiveness of the city. After years of advocacy, the city decided to close down the Moncton Coliseum, located in the city's periphery, opting for a new publicly funded events centre in the downtown core. Initially, there were mixed emotions from the community due to the high costs of the events centre, and there were many doubting whether people would attend events at the new venue due to its new location in a part of the city not deemed attractive, and due to lack of parking. Nevertheless, in 2013 the events centre broke ground and it was completed 5 years later in 2018, it was initially named Moncton Events Centre, and later renamed Avenir Centre. The 8,800-seat events centre amounted a total cost of \$107 million. As part of its development, the events centre also included a new adaptable public plaza that would double as an ice rink in the winter, and a outdoor music and community space with trees in the summer. The event's centre signed two permanent tenants, the Moncton Wildcats of the Quebec Major Junior Hockey League, and the Moncton Magic of the National Basketball League.

Both sports teams had good years, with the Moncton Magic winning a title during their first season at the venue. Apart from the regularly occurring sporting events, the centre has also hosted world renowned



artists, such as Keith Urban, Bryan Adams, and Def Leopard, as well as events for Cirque Du Soleil and the Ultimate Fighting Championship. The events centre management team states that they are strongly committed to promoting the centre to draw big acts and in turn raise the profile of the venue and the community. To solve the parking concerns from the Moncton residents, for every event hosted at the venue, the City of Moncton increased its number of buses on the road on those days, this proved to be a successful alternative to access the venue, and during its first year of operation 250,000 people attended events organized at the events centre. The venue has managed to catalyze development in the Downtown, including the addition of two new hotels within a block of it. There is also a trio of 15 storey towers that broke ground in 2021, and some smaller apartment buildings closer to AVENIR Centre, totaling 709 new residential units since the events centre was built. In total by the end of 2021, the AVENIR Centre had generated over \$68 million in increased assessment value already at the end of 2021, on track to surpass its \$108 million target by 2023 to recover the cost of the stadium. AVENIR Centre has been called a success by many, including the Downtown Moncton Centre-ville group, who claim that businesses have benefited greatly from the increase in activity generated by the venue on event nights.

Key takeaways:

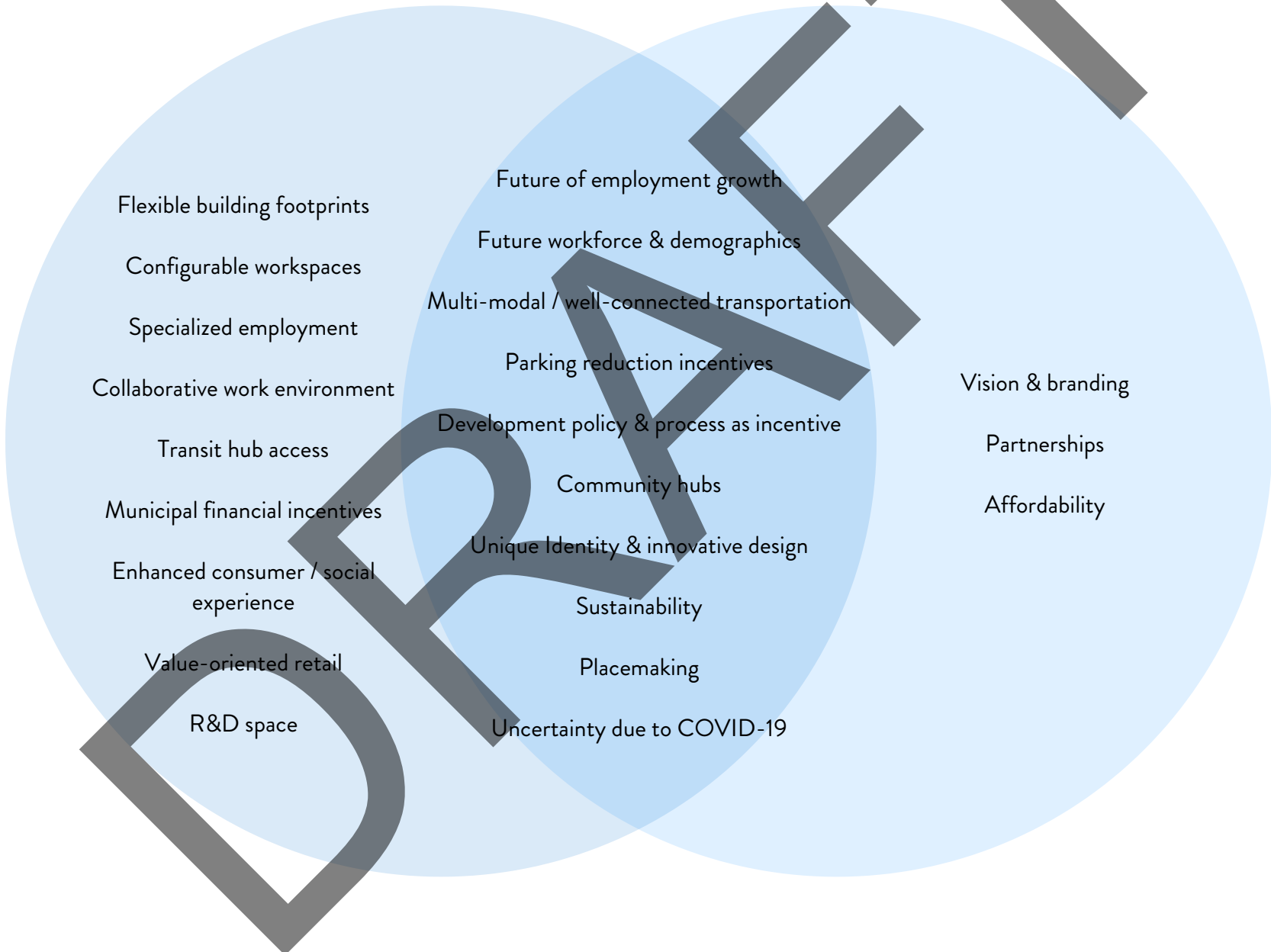
- Events centres have the potential to catalyze growth when there is a good mix of events and popular acts that draw large crowds and raise the profile of the community.
- Events centres located in high density mixed-used communities can draw large crowds even in regions where car is the preferred form of transportation, as long as frequent and accessible transit is offered.

DRAFT

KEY THEMES FROM FOUNDATIONAL STUDIES & STAKEHOLDER ENGAGEMENT

THEMES EMERGING FROM FOUNDATIONAL STUDIES

THEMES EMERGING FROM STAKEHOLDER ENGAGEMENT



SUMMARY OF FOUNDATIONAL STUDIES - 2019

The foundational studies that review the industrial, office and retail markets in Burlington and the broader GTA were conducted by Deloitte LLP and are summarized below.

Trends in the Industrial Market

Five key trends were highlighted in the studies as influencing the industrial sector's future state while reshaping the land economics and uses based on the following requirements:

1. Flexible building typologies and footprints.

As the manufacturing sector becomes more consumer-centric, good quality, well-located, modern industrial assets will be one of the most desirable asset classes in Canada. Aligned to enhancing the consumer experience through multiple touchpoints, businesses are designing industrial buildings that allow for flexibility of alternative uses, such as service centres / showroom properties used in the auto-industry. This could also translate to businesses requiring smaller warehouses close to urban centres to handle pick-up and returning requests.

2. Digital infrastructure and R&D space.

IoT capabilities and integrated machine learning technologies will enable the development of products with cutting edge technologies. Smart products will lead to highly digitalized transit hubs with automatized machinery, requiring industrial sites that meet industries' locational requirements while incorporating flex and R&D uses into the Zoning Bylaw and Official Plan. Increasing demand for IoT applications and technological innovation will drive demand for R&D space, such as business parks, to develop new solutions and test various applications in the real world.

3. Well-connected transportation infrastructure.

A digitized supply chain requires a stronger reliance on IoT and sensor powered technologies as well as infrastructure to serve the growing demand within the supply chain. The digital supply chain will require fulfillment centres in close proximity to large urban centres, necessitating a stronger reliance on public infrastructure such as highway networks to serve warehouses and distribution centres' mandates. A major cost driver in e-commerce is transportation, which accounts for approximately 50% of the total cost. As a result, well-connected and established highway networks are crucial infrastructure to support the growth of fulfillment centres.

4. Fewer and more specialized jobs.

Smart factories will leverage smart plug-and-produce approaches to increase manufacturing agility, also known as Industry 4.0. Modular construction and smart building will change the talent skill sets and knowledge requirements, shifting the talent pools that will be tapped. As factories continue to progress to Industry 4.0, employment opportunities will accelerate towards high technology and specialized skill-sets. Likely this means that there will be a demand for newer skills, but fewer workers –land use will be further optimized and intensified. This will likely mean that although demand for technical talent will increase, there may be fewer and more specialized jobs, resulting in an opportunity for the City to free up industrial employment land for alternative uses.

5. Flexible policy and zoning regulations.

Evolving business models require meeting prerequisites in order to accommodate changes. The industrial sector continues to progress at an accelerated rate in order to accommodate the fast-paced implementation of technologies. Enterprises are continually challenged to adjust their business models and maintain flexibility within their business models. This will mean businesses require greater support through policy measures and flexible / multi-purpose end-use options.

Trends in the Office Market

Four of the following key recommendations emerge from the studies for Burlington's office market:

1. Burlington faces significant competition from Oakville.

Burlington possesses a highly educated and skilled workforce, which provides a tangible competitive advantage when trying to attract and retain employers. However, Burlington is located in the Greater Toronto Area West, the most competitive suburban office market in the Greater Toronto and Hamilton area. Oakville is preferred by the international and institutional occupiers and that is unlikely to change in the short or medium-term. Burlington itself is currently a preferred location for local occupiers and lends itself to development as a regional hub for smaller users who desire office space that is different from traditional institutional uses.

2. Market will favor traditional greenfield development.

The QEW Corridor and the 403 West Corridor represent traditional greenfield development locations. Historically, the majority of new major office buildings outside of the City of Toronto have been accommodated in business park environments featuring superior 400 series highway access

or GO train access in some instances. The most successful suburban office nodes, such as those in Mississauga, prospered due to their proximity to major arterial highways, high visibility and branding for large office users, proximity to employee populations and large areas of surface parking to satisfy tenant requirements for high parking ratios. If the market is left to act freely, the QEW and 403 West corridors are likely to see lower density, greenfield development due to lower construction costs, however this is at odds with the Province's growth plan which promotes intensification. The market must be provided with financial incentives, such as a community improvement plan (CIP) to locate in mixed-use environments and attract office users in the MTSAs.

3. Workplace transformation will affect potential growth.

Open concept and collaborative environments are steadily becoming the norm for new office developments. The demand for office use is changing increasingly as companies choose to offer teleworking and agile work environments –ultimately resulting in less space per worker and reduced demand. Furthermore, there has been a shift internally towards flexible, configurable space that offers plenty of natural daylight. Burlington must encourage and embrace the workplace transformation and it's built-form in order to attract developers and tenants.

4. Burlington needs to leverage its role as a regional hub in the marketplace.

Burlington is a regional hub that is a preferred location for local users, while Oakville is a target for larger international and institutional entities. This dynamic is unlikely to change in the short or medium-term as Oakville will always be closer to Downtown Toronto, Pearson International Airport and other established infrastructure. The City must take a leadership role throughout the development process, and consider using financial incentives to attract development or facilitating expedited planning approvals. Ultimately, Burlington Economic Development and Burlington stakeholders must embrace their role as a regional hub and implement creative measures to attract and retain tenants who are more likely to invest and stay in Burlington.

The studies highlight five prevailing trends that are disrupting the office industry and will impact future office developments:

1. War for Talent.

Surrounding uses of an office building and the supporting retail mix have become one of the key considerations when organizations choose a location as they aim to accommodate preferences.

2. Agile Workspaces & Footprint Optimization.

With the reductions of office space requirements and an increasing demand for amenities, the GO Investment Corridor development needs to be cautious to ensure an appropriate amount of new supply.

3. Infrastructure Improvements.

Affordable, reliable and convenient transit options are highly sought after and are the key components for any successful mixed-use development.

4. Sustainability.

End-users and landlords are increasingly looking for ways to improve sustainability to achieve their objectives, it is important for to keep this in mind during the build out process of the GO Investment Corridor.

5. The Rise of “Space as a Service”.

Where possible, the MTSA may incorporate the rise of co-working spaces in its planning process to accommodate future demand for small-scale office space.

Trends in the Retail Market

The studies highlight the following key trends emerging in the retail market:

1. Omni Channel & Retail Accessibility.

Retailers are enhancing the consumer experience by aligning all consumption channels. Brick-and-mortar retail remains relevant as

the impact of e-commerce is not equal across all retail categories and formats. The MTSA must target comparison retailers that are able to thrive in a suburban setting or have a strong existing customer base.

2. The Rise of Mixed-use Developments.

Retail amenities within these mixed-use concepts typically are convenience-based to support on-site residents and commuters, but may also include entertainment and leisure facilities to attract customers and visitors from a wider trade area.

3. Rise of Food, Beverage, & Entertainment as “New Anchors”.

As consumers are placing greater emphasis on social experiences and health as part of their lifestyle choices, food & beverage, wellness, and entertainment offerings are increasingly part of the retail mix.

4. The Polarization of Retail.

Alongside the ‘hollowing out’ of the mid-market segment has come a surge of value-oriented and premium retailers. The MTSA could be positioned with value-oriented and convenience retailers.

5. Walkability & Placemaking.

Implementing enhanced urban design features and placemaking elements that are unique to each MTSA would add an element of visual completeness and attract visitation.

SUMMARY OF FOUNDATIONAL STUDIES - 2021

The Future of Work study is a foundational study that reviews the industrial, office and retail market trends in Canada post-2020 was conducted internally, these trends are compared and applied to the Burlington context.

Trends in the Industrial Market

The industrial real estate market experienced vastly different trends and relatively no negative impacts from COVID-19. During this period, E-Commerce activity skyrocketed, increasing demand for industrial land, and resulting in the lowest vacancy rates for industrial land in Burlington in the past 10 years, averaging around 2%. The industrial real estate shortage has resulted in interest in industrial densification, such as multi-story industrial buildings, a similar trend seen in the rest of the GTA. Labour shortages have been a key trend during this period, leading industrial businesses to make investment decisions based on areas with a high availability of labour.

Trends in the Office Market

Since the beginning of COVID-19, office real estate has been negatively affected to a degree greater than any other market. Burlington has experienced its highest office vacancy rates in the past 10 years, averaging around 20%, some of the highest in the GTA. This is largely due to a shift in the ratio of office work versus work from home for most office

workers during the pandemic, with virtually all office workers having worked from home during this period. The work from home trend has resulted in a permanent reduction in demand for office space, which is expected to continue for the next few years as 1/3rd of businesses expect to reduce their space used by 5-15%. Additionally, most large companies have decided to adopt hybrid work plans after the pandemic is over. As a result, Burlington's office market is not expected to return to pre-COVID levels until 2026.

Trends in the Retail Market

The real estate market saw similar trends to the industrial and office markets. The rise of E-Commerce caused an increased blurring of lines between warehousing and retail. Businesses are still interested in increasing in-person shopping, with many businesses reinventing their physical stores. This timeframe also saw an increase in consumer interest in sustainable retail. Burlington's retail vacancy rates are expected to remain stable for the next three years with some likelihood of decreasing.

STAKEHOLDER ENGAGEMENT: MARKET FEEDBACK - 2019

During the initial phase of the study (pre-2020), the first part of the stakeholder consultation focused on interviews with market groups, including realtors, developers, existing businesses and land owners within the MTSA's. It should be noted that the majority of developers who were interviewed were primarily experienced in residential developments. Burlington Economic Development reached out to contacts within these market groups to conduct one-on-one interviews to determine their vision for the MTSA's. The key themes that emerged are outlined below:

Multi-modal Transportation

As Metrolinx plans for more frequent regional GO service and reduced travel times to and from Burlington, transit users are expected to increase in the near future. To help the public make the shift from auto-reliance to using transit, it is essential to provide connectivity between the MTSA's and the rest of the city. The improved GO service is an opportunity for Burlington to reduce traffic and congestion by investing in local transit. The city needs to provide seamlessly integrated, multi-modal transit to help people travel between their origin and destination conveniently. The transit infrastructure needs to be in place to assist the shift from automobile reliance. New transit modes and programs, such as car sharing, bus rapid transit, etc., should be easily accessible to provide transit users with more cost-friendly and convenient options, making them more likely to use transit. Aside from

providing multiple transit service options, the MTSA's should have an integrated transit system, such as well-connected bicycle and sidewalk networks to create a safe environment for cyclists and pedestrians. A key concern for stakeholders was supporting the transition to a transit-oriented community with the lack of transit and active transportation infrastructure currently available in the MTSA's.

Development Policy and Process

The development process for the MTSA's should be streamlined and there should be clarity in the vision and development requirements. The definition of the desired employment uses within the MTSA's should also be clear so that developers are able to understand the needs and requirements of the target employers and employees. A lack of clarity on the expectations and vision within the development process can cause significant delays in development, which increases costs and may deter desired development from occurring.

Specifically, the development process needs to be streamlined and more efficient for employment-focused developers due to their lower return on investment as compared to residential developers. The timing is also significant for employment-focused developers because businesses are usually looking to lease space immediately and their decisions are often

based on ever-evolving business cycles.

Concerns regarding the development process also extended to external development approval agencies, including Ministry of Transportation of Ontario (MTO), Canadian National Railway (CNR) and Conservation Halton. One developer whose project was within the CNR jurisdiction cited multiple new regulations and costs that came up unexpectedly during the process. Developers and land owners want a clear process with little to no surprises.

One conflict that may arise in the development process is inconsistency in the GO Investment Corridor Vision between various stakeholders, such as the city, land owners, developers, and business owners. It can be difficult to commence development if the vision for particular sites is inconsistent between stakeholders; therefore, it is important to engage stakeholders throughout each stage of the visioning process and provide clear and well-defined expectations and policies. The majority of stakeholders who were interviewed had plans for residential development for the sites they owned or were considering to develop, with a limited vision for non-residential development. The perception of mixed-use mostly entailed ground floor commercial uses with residential above. There was no strong employment vision for most of the sites and many stakeholders cited the difficulties or lack of experience with integrating non-population-based employment and residential buildings in a development.

The Future of Employment Growth

The rising prices of land in the MTSA's and the strong interest of residential developers will cause the displacement of industrial businesses to other parts of the city. Burlington has a shortage of land for industrial development and many of the uses may be pushed out to other areas in or outside of the city. To retain employment within the MTSA's, the city will need to identify the types of employment uses that can be successfully integrated into mixed-use areas. The current vision of stakeholders interviewed does not integrate industrial uses in the MTSA's, except for the Appleby GO MTSA. It is possible that the economy around the MTSA's may shift from industrial and manufacturing uses to professional services and high-tech employment. This is in line with broader employment trends seen across Burlington and Canada over the last 20 years. The future employment areas should be identified in the MTSA's where the employment uses are compatible with other surrounding uses. The target employment uses should be attractive and desirable for the area. Appleby GO MTSA was seen as a strong focus for future employment growth and the need to protect the employment uses north of the tracks was cited by several stakeholders.

A clear consensus emerged in the MTSA's as attractive locations for professional services and technology firms whose workforce is composed of young knowledge workers. Stakeholders cited the easy

transportation links to Toronto and the proposed mixed-use amenity rich environment as clear drivers for professional services and technology firms. From a developer and land owner perspective, many stakeholders assumed employment uses would be focused on population serving uses such as retail, health professionals and restaurants reflecting the current commercial mix of employment in the MTSA.

Community Hubs

A key theme that emerged often during interviews was that the MTSA should not be one-dimensional bedroom communities. In order to combat this, the MTSA not only need to integrate a number of uses but be a key attractor to draw people outside of getting to the GO train stations. Suggested amenities included community recreational hubs, parks, unique restaurants and retail and a mix of employment uses. The MTSA should have a “European feel” and be a place that encourages people to gather and create community.

It was suggested that they should be a key focus of city building moving forward with new recreational, institutional and transportation infrastructure planning focused on the MTSA. They should be inclusive, livable communities that integrate a wide variety of uses, be easily accessible by transit and allow and encourage people to interact with one another.

Vision and Branding

Each of the MTSA has distinct features, such as existing land uses, infrastructure and amenities. Whereas the Appleby GO MTSA has the highest concentration of industrial employment, the Aldershot GO MTSA has unique geographic features, such as being in close proximity to the Royal Botanical Gardens, and the Burlington GO MTSA is accessible to the downtown and waterfront. The nature of each MTSA should be enhanced and emphasized by creating a unique and distinctive brand for each of them.

According to initial feedback from stakeholders, the MTSA should be developed with a European vision in mind. Much of the development in Europe is transit-oriented and mixed-use with high levels of intensification, well-connected transit infrastructure, and is a good precedent for the MTSA. Many stakeholders cited the European feature of squares and piazzas that created gathering places and drew people. Some of the key words from a branding perspective included: complete communities, connected, “live, work play”, accessible, efficient, creative, vibrant, functional, and convenient.

Future Workforce and Demographics

The MTSAAs were readily identified as having the capability to provide all the attributes that will appeal to future knowledge workers. These included easy access to public transportation and the ability to be car free, easy connectivity to the broader GTA region and a mix of amenities accessible within walking distance. These attributes were deemed particularly important in looking forward to future workforce demographics and the domination of millennials, and Gen Y and Z, who were seen to be influencing future work force trends. The MTSAAs were also perceived as providing an affordable housing/market entry option for the new generation of knowledge-based workers.

The MTSAAs will need to provide a range of employment options that appeal to the future workforce demographic, and provide lifestyle amenities as well as affordable housing options to retain the workforce in Burlington. According to many of the realtors within our stakeholder group, employers are seeking office buildings that meet their new requirements, specifically for facilities and lifestyle amenities that are attractive to the younger workforce. As more of the younger demographic enters the workforce, their lifestyle and demands are constantly restructuring traditional offices to more flexible, comfortable and collaborative environments. This new office model needs to be implemented in the MTSAAs to attract the desired employment uses and

workforce.

Unique Identity and Innovative Design

Each of the MTSAAs needs to be designed with a unique identity in mind that can be leveraged to brand and market the MTSAAs. The future identity of the MTSAAs needs to be leveraged in all aspects to plan and they should be designed in a manner that creates a unique identity and community feel.

Stakeholders also pointed to the opportunity to integrate new state of the art features into the planning of the MTSAAs. These varied from green design, to world class design, to smart infrastructure. A forward-thinking philosophy should be at the heart of not just the design but also the infrastructure of the MTSAAs. Key elements to appeal to employers of the future will be significant broadband capacity and the integration of smart technology and smart city features into the neighborhoods. The MTSAAs should be test beds for new ideas and technology and Burlington should be willing to partner with developers, designers and businesses to build state of the art neighbourhoods.

STAKEHOLDER ENGAGEMENT: MARKET FEEDBACK - 2021

Stakeholder engagement was conducted in two parts. meetings were held with the local business, development, and real estate community. The meetings included a full presentation regarding the project, as well as a discussion based on the research conducted during the post-COVID-19 phase of the project. The following are the key themes that arose from the discussions

CO-WORKING SPACES

There is currently a lot of demand for workspaces for those that work from home and need more space or want a change of scenery. This is likely to remain even as the pandemic subsides. Currently developers are meeting this demand internally, by providing amenity space within their developments for residents.

PARKING

Parking ratios are contributing to unaffordability and need to be reduced but also need to be flexible enough to match demand. Parking lots and building spaces will also need to be flexible in order to navigate the changes during the pandemic, and to pivot if trends (WFH) that we are currently seeing are reversed after the pandemic.

VISIONING

Visioning and planning should not focus too narrowly on current conditions caused by COVID-19, because these conditions may not be relevant in 30 years.

INTEGRATING CURRENT BUSINESSES

Current industrial businesses benefit from the transportation infrastructure found in and around the MTSA's, they want to remain in the area, and wish to see as little disturbance as possible from the redevelopment of the surrounding lands. Compatibility of land uses will be of utmost importance to successfully integrate industrial uses and other non-commercial uses, such as parks and residential development.

OFFICE SPACE

Office space needs have been changing, cubicles are useful for social distancing, but they are expected to quickly be replaced after COVID-19 passes. Businesses are also requiring less space for employees because of remote working arrangements, so there is a high level of uncertainty over future demand.

MOBILITY

Current active transportation links are subpar and dangerous. There is a need and an opportunity to create better transportation links both active and vehicular.

STAKEHOLDER ENGAGEMENT: OTHER FEEDBACK - 2019

This stakeholder engagement part of the pre-2020 phase focused on partner groups, including City of Burlington departments, Regional economic development, planning, environmental and transit agencies, school boards and libraries, and real estate boards. Many of the ideas that emerged from these discussions were similar to the ideas of the market groups, discussed in the section above. The city and regional partners emphasized the following additional concepts:

Sustainability

As Burlington nears the end of its land supply, it is ever more significant for the city to ensure future development aligns with sustainable development policies and regulations. Burlington needs to preserve its existing natural areas. The natural heritage features within the MTSA's need to be preserved and enhanced as natural amenities for the residents and workforce. Sustainability must be emphasized at the community level, but also at the business level. Businesses should be made aware of sustainable business practices and available resources. LEED-certified and zero carbon office and industrial buildings should be encouraged and incentivized in the MTSA's. Brownfield redevelopment should be encouraged using financial and policy incentives and tools. The city should explore district energy systems in the MTSA's as a means of minimizing environmental impact and attracting investment. The design of the MTSA's should encourage active transportation


in order to reduce emissions from automobiles, and reduce overall traffic and congestion. Parks and open spaces should also be encouraged in the MTSA's.

Placemaking

The MTSA's must be attractive and inviting for all ages. Investment in arts, culture and entertainment will cultivate a high quality of life that will help to attract knowledge workers and multi-generational talent. There should be a distinct brand for each of the MTSA's that reflects and enhances the unique character of the area. The MTSA's should not only have an attractive environment for residents, but also for small businesses and retailers, who can benefit from placemaking elements. The focus should be on creating destinations within the MTSA's that attract visitors, as well as employees and residents through offering events and unique experiences. Vibrant public spaces that create opportunities for collaboration and inspire creativity should be integrated into the MTSA's in order to foster innovation and talent.

Partnerships

In order to make any vision for the MTSA's successful, it is essential to understand the interests, roles and responsibilities of the various



stakeholders involved in the process or affected by the development. Forming public-private partnerships with key market and public-sector stakeholders, and providing a platform for them to participate can help everyone achieve their goals efficiently through pooling resources and sharing risks. Partnerships between market stakeholders and partners can help bridge the gap between the interests of both groups, and develop a scenario that is satisfactory for all parties. Partnerships can be a significant tool for improving economic and time efficiencies by involving stakeholders at an early stage, and reducing the gap between planning and implementation.

Affordability

The conversions of employment land to mixed-use has caused land prices to escalate at an unprecedented level in the MTSA. The high cost of land is one of the factors that discourages employment land development, as there is a higher return on residential development. There is a general misinterpretation that the conversions mean the focus has shifted from employment to residential use. However, this is not the case; rather, the residential is allowed as an ancillary use where mixed-use development is permitted. Rising costs for land can deter businesses from purchasing or renting within the MTSA, even though they may be ideal places for businesses to locate. The MTSA need to be affordable places for

businesses to locate and expand, through efficient timelines, and financial or other incentives. The lack of affordability would not only be an issue for businesses, but also for the younger generations and families who desire to live and work in Burlington. The MTSA need to be affordable places to live for younger generations to ensure Burlington is a top location of choice for talent. There needs to be a mix of housing types that are affordable within the MTSA in order to cater to a diverse population of residents. Other than housing, the transit also needs to be made affordable for workers and residents to encourage alternative modes of transportation, especially for the younger workforce that does not own cars.

STAKEHOLDER ENGAGEMENT: OTHER FEEDBACK - 2021

Steering Committee

A steering committee comprised of industry expertise was formed in order to provide additional guidance and feedback regarding the project in its post-COVID-19 phase. The committee had members within various fields of expertise, including Industrial, commercial, institutional (ICI), & mixed-use development, urban planning, post-secondary partnerships, ICT and professional services, talent attraction and retention, and marketing and branding. The committee also included landowners within the MTSA areas.

The recurrent themes that were provided as feedback from these sessions were the following:

- Encouraging ICI Development: incentives are necessary, there is a clear disparity between the attractiveness of developing residential versus ICI, and this discourages ICI and mixed-use development. The development process for ICI development is also lengthy and arduous, and it is very constrained by current zoning by-laws.
- Parking: People will continue to drive to the GO stations for their daily commute and leisure activities and underground parking is quite expensive to build, so surface parking will be needed, even as the MTSA's become fully developed. Parking ratios should match demand, there should be flexibility in ratios, and the parking needs of different uses should be accounted for to maximize land-use efficiency.

Co-working Space Interviews

This engagement activity was added to the project workplan following the stakeholder workshops, where we heard that individual resident demand for co-working space was high, and developers were taking a proactive role in providing these amenity spaces as part of their developments. However, this is not the most effective use of land in the MTSA's, since that space can be used for more residential or ICI units. This is an opportunity for co-working spaces to expand to the MTSA's and meet the future demand for co-working space in these areas. Consequently, interviews were held with the local co-working spaces in Burlington to identify interest in these areas.

Currently there is not a lot of interest in expanding to these areas, at the time of the interviews coworking spaces were still recovering financially from the COVID-19 pandemic lockdowns, which impacted the types of coworking spaces in high demand by remote workers, such as those with a pay-per-use structure more than those with a fixed structure.

DRAFT GUIDING PRINCIPLES



1. Develop each MTSA into a complete community that has a mix of residential, employment, Institutional and recreational uses.

The MTSA's will be compact, mixed-use urban neighbourhoods that will enhance the quality of life by providing a range of amenities and services catered to residents and businesses within a walking distance. The MTSA's will be destinations that attract visitors and bring the community together through places and programming.



2. Focus on planning for future services and infrastructure, and ensure sustainable development.

Plan for services and infrastructure, both physical and virtual, in a manner that meets future trends and needs. The MTSA's will be able to accommodate the future demographic and business needs and will require long-term planning and revision. The future vision will be flexible and be able to adapt to current conditions.



3. Develop a unique identity for each MTSA and a marketing brand focusing on attracting people and talent to the area.

Each of the MTSA's encompasses a unique identity, which will be enhanced to make them into desirable places for residents, employers and visitors alike. The distinctive brand of each MTSA will be representative of its current strengths and will ensure the area is an attractive destination instead of a pass-through zone for transit users.



4. Identify key employment growth areas in the MTSA's and market to the future workforce and industries.

The areas designated for employment growth within the MTSA's will attract desirable uses and accommodate the evolving requirements of employers. The employment uses will be compatible with the surrounding uses of the area and will cater to future businesses and talent. The MTSA's will provide a range of affordable housing options, transit connectivity, and amenities that will support the future workforce.



5. Integrate the MTSA's into the city fabric and provide seamless transportation connectivity.

Ensure that the GO Investment Corridor Vision aligns with the vision for the broader City of Burlington. The MTSA's will be individual communities that are seamlessly connected through infrastructure such as street network, transit, sidewalks, cycling paths, etc.



6. Engage stakeholders to develop a collaborative implementation plan for the GO Investment Corridor vision.

It is essential to engage stakeholders at all levels early in the process to develop a holistic implementation strategy and business plan for the development of the MTSA's. The execution of this vision relies on strong collaboration to ensure the resources and tools are in place to reach the full potential of the MTSA's and ensure a smooth development process.

DRAFT

IMPLEMENTATION

KEY BARRIERS AND OPPORTUNITIES

The following barriers and opportunities relate to the implementation of this economic vision from the perspective of stakeholders who were interviewed.

BARRIERS

- The development community lacks a vision for employment uses within the districts. The lack of vision for employment is combined with a lack of experience in development of office and industrial, as most of the land has been purchased by residential developers.
- Multiple levels of government agencies involved in the development process, obtaining a development permit can be time-consuming. ICI developers can have a difficult time securing tenants, as business cycles are fast-paced and constantly evolving.
- Employment land conversions to mixed-use has resulted in high costs of land in the districts, which can make the land unfeasible for ICI development. Higher rents and housing costs also make it difficult for young workers and families to secure housing, and makes it difficult to attract talent.
- Currently, the districts lack amenities, public spaces, and retail uses attractive to the employers and workforce of the future.
- Uncertainty regarding hybrid work and demand for office space.
- The districts are intended to be walkable, transit-oriented areas. However, the current population relies on cars to travel, and office and industrial users require a significant amount of parking per unit.

OPPORTUNITIES

- Attract a significant number of jobs and investment in the community through the development of the districts.
- Create desirable employment areas that fit with the character of each district, and are attractive to the employers and workforce of the future.
- Develop amenity-rich employment areas that are attractive to the younger talent base.
- Streamline the development process and expedite process for employers creating a significant number of jobs of investment in the community.
- Develop and implement an institutional attraction strategy to capture research and development in the community, and retain a young, and creative talent base.
- Dedicate an implementation team for the districts to ensure the plan is implemented efficiently and in a timely manner, and that stakeholders are engaged throughout the implementation process.
- Develop a new business brand and marketing strategy for the districts that is appealing to the types of employment uses and workers Burlington needs.
- Form strategic partnerships to address barriers early on in the process and develop creative mechanisms and support tools to achieve successful economic outcomes.

KEY RECOMMENDATIONS

PRIORITY ACTIONS

The list was developed based on all of the research, stakeholder engagement, and steering committee sessions. This list selectively includes priority implementations, and it is not an extensive list of all implementation actions that will be undertaken throughout the project. The rest of the implementation actions, with examples, are found in the following sections. The priority implementation actions were grouped into the following major themes:

- Tools & Partnerships: Establishing dedicated teams of city staff from various relevant departments, these dedicated teams include an implementation team, and a team that provides MTSA development support. Identifying and investing in key parcels in the MTSA through the Burlington Lands Partnership and private developers. Developing effective tools and strategic partnerships with external organizations, and supporting main street businesses through the creation of new Business Improvement Areas.
- Land Use Planning: Reviewing the zoning by-law to align it with the economic vision for the MTSA, developing a transitional parking strategy as demand for changes through the development of each MTSA, and advocating for new active and vehicular transportation linkages.
- Attracting & Retaining Businesses: Drafting and adopting new financial incentives to encourage ICI development, developing a branding strategy for each MTSA, and working with current businesses to ensure a smooth transition throughout the development of each MTSA, this may include finding alternative locations in the city for those that are not compatible with the planned land-uses.

KEY RECOMMENDATIONS

1. DEVELOPMENT SUPPORT

- Establish a dedicated implementation team comprised of city and economic development staff that ensures efficient implementation of the GO Investment Corridor Vision.
- Establish a community planning permit system, previously known as development permit system that streamlines and expedites applications for employment land development that has the potential to create a significant number of jobs or investment in the community.
- Develop regional and municipal incentives for development focused on employment uses.
- Review the zoning bylaw and regulations pertaining to ICI development, and ensure there is flexibility to accommodate a greater mix and density of employment uses.
- Invest in land in the districts, and pursue joint ventures for development to implement the employment vision directly.

2. BRANDING & PLACEMAKING

- Develop a cultural and placemaking strategy for the districts, including tools and support available from the city for public-private partnerships.
- Develop programming that makes the districts active and vibrant 24/7 in partnership with the BIAs and Parks and Recreation.
- To attract employers and workforce of the future, integrate public spaces and amenities in employment areas, and leverage urban design guidelines to encourage creative architecture.
- Foster cultural and creative industries and businesses in the districts.
- Create public spaces that inspire and support collaboration and collision of ideas.
- Foster retail and small businesses that contribute to the unique character of each area.
- Institutional and city investment in cultural infrastructure and services, such as libraries and BIAs.

3. SUSTAINABILITY AND INNOVATION

- Allow for higher density and greater mix of employment uses to support sustainable development.
- Integrate smart city infrastructure in the districts and ensure development can easily adapt to future technology.
- Encourage and incentivize LEED-certified and zero carbon buildings.
- Develop tools to manage an energy demand plan for key areas in the districts, in order to reduce climate change impact and attract private investment.
- Implement a broadband network, and create technology-enabled areas to allow employees to enjoy greater mobility and flexibility.
- Facilitate pilot projects in the districts for adopting new technologies and reducing barriers in implementing innovative and sustainable solutions.

4. TRANSIT AND TRANSPORTATION

- Increase the level of service and transit connectivity in the districts at both the City and regional levels.
- Encourage well-connected, compact development to promote active transportation.
- Establish alternative first-mile-last-mile solutions.
- Develop an interim/transitional parking strategy.

5. EMPLOYMENT ATTRACTION

- Develop an Employment Attraction Strategy for the city.
- Conduct a cluster analysis to determine which key industry clusters to focus on for employment attraction.
- Partner with post-secondary institutions to develop a cluster-based talent strategy.
- Leverage Halton Region's Newcomer Strategy and establish Burlington's planned economic migrant outreach and liaison office to attract investors and entrepreneur class immigrants and businesses.
- Attract foreign talent and businesses through the Global Skills Strategy.
- Form partnerships with international cities to attract investment and talent.

GUIDING PRINCIPLE #1

Develop each MTSA into a complete community that has a mix of residential, employment, and recreational uses.

Strategy #1: Achieve true mixed-use environments that focus on substantial employment outcomes.

POTENTIAL ACTION 1

Promote and market the mobility MTSA to best in class industrial, commercial and institutional (ICI) developers.

POTENTIAL ACTION 2

Collaborate with existing developers in the MTSA to establish successful mixed-use projects.

POTENTIAL ACTION 3

Establish tools to manage future employment development and growth, and ensure true mixed-use environments.

Example tactics

- Identify best in class developments across the GTA and Canada and develop a list of targeted developers to approach.
- Develop marketing materials for key redevelopment parcels that discuss constraints, potential solutions and estimated timelines for development.
- Promote key purchasing and development opportunities to best in class ICI developers.

Example tactics

- Connect developers in the mobility MTSA with best in class developers with expertise in mixed-use development.
- Encourage partnerships between residential and ICI developers in the MTSA.
- Advocate for development policies and regulations that promote mixed-use as a cost-effective form of development.
- Form clear and specific employment density targets and types of employment uses supported in the MTSA.
- Engage developers early in the process and notify them of target employment density and uses.

Example tactics

- Develop tools to participate in joint ventures, such as a municipal development corporation, to sustain employment growth.
- Advocate for mixed-use policies and zoning regulations unique to each MTSA.
- Advocate for flexible zoning regulations that accommodate a range of compatible light industrial uses in mixed-use environments.
- Advocate for and support transit-oriented developments in the MTSA.
- Advocate for creative solutions, such as a Community Planning Permit System, to expedite and incentivize employment-focused development.

GUIDING PRINCIPLE #1

Develop each MTSA into a complete community that has a mix of residential, employment, and recreational uses.

Strategy #2: Create a sense of place and character appealing to the future workforce and demographic.

POTENTIAL ACTION 1

Encourage stakeholders to collectively invest in public art projects and streetscape beautification.

POTENTIAL ACTION 2

Advocate for recreational activities that employers can leverage to attract and retain their workforce.

POTENTIAL ACTION 3

Advocate and assist in generating unique, authentic experiences and events in the MTSAs.

EXAMPLE TACTICS

- Advocate for the establishment of the Percent for Art program in the MTSAs
- Partner with BIAs to encourage businesses to invest in public art and streetscape projects.
- Engage local, community artists, arts and cultural organizations, and non-profit groups in the process.
- Encourage partnerships with transit agencies to implement art projects along major transit nodes as a wayfinding tool.

EXAMPLE TACTICS

- Engage with Transportation Services to include employment areas in the Cycling Master Plan.
- Encourage developers to create units for recreational and service-based businesses to locate within employment areas.
- Advocate developers and businesses to invest in indoor and/or outdoor placemaking elements.

EXAMPLE TACTICS

- Partner with BIAs, other city organizations and festival organizers to host and market public events in the MTSAs.
- Leverage urban design guidelines as a method of developing a wayfinding system in the MTSAs.
- Advocate for a food hall in one of the MTSA to locate for flexible zoning for food trucks in the MTSAs.

GUIDING PRINCIPLE #1

Develop each MTSA into a complete community that has a mix of residential, employment, and recreational uses.

Strategy #3: Foster small businesses, retail and other amenities that cater to the requirements of employers and employees.

POTENTIAL ACTION 1

Identify and cater to the needs of existing businesses, residential communities and future population.

EXAMPLE TACTICS

- Examine current demographic data and analyze future trends.
- Determine current and future needs of employees, and existing and target businesses.
- Ensure current and future business and residential needs are considered in the development of the MTSA.

POTENTIAL ACTION 2

Develop a phasing plan for retail and commercial uses in mixed-use developments and commercial corridors.

EXAMPLE TACTICS

- Determine existing retail demand and supply.
- Determine future retail and commercial demands of target business and resident consumers.
- Examine the changing dynamics of the retail industry.
- Advocate for flexible retail units to accommodate future retail trends.
- Market the MTSA as desirable areas for target retailers.
- Encourage an appealing public realm in retail areas to attract consumers.

POTENTIAL ACTION 3

Focus on developing support tools and resources for small businesses.

EXAMPLE TACTICS

- Extend existing BIAs or create new BIAs in areas with a significant concentration of small businesses in the MTSA.
- Partner with the Burlington Chamber of Commerce to actively promote networking opportunities.
- Promote existing coworking spaces in Burlington and attract other coworking associations and organizations in the MTSA.
- Leverage Halton Small Business Centre to provide business planning support.

GUIDING PRINCIPLE #2

Focus on planning for future services and infrastructure, and ensure sustainable development.

Strategy #1: Develop a joint phasing and servicing strategy with the Region and other partners.

POTENTIAL ACTION 1

Create a smooth development approvals process with clear infrastructure and environmental mitigation requirements.

POTENTIAL ACTION 2

Advocate for public and private sector investment in physical infrastructure and community services.

POTENTIAL ACTION 3

Plan for and phase future community infrastructure and amenities.

EXAMPLE TACTICS

- Partner with Conservation Halton to understand the impact of intensification on the watershed and develop clear requirements for developers.
- Advocate for Ministry of Transportation Ontario (MTO) to develop efficiency in approvals process and provide clarity in jurisdictional boundaries.
- Advocate Canadian National Railway (CNR) to provide clarity and efficiency in approvals process.
- Develop a regional collaboration strategy and partnership with the Region to prioritize mixed-use development and intensification.

EXAMPLE TACTICS

- Encourage public-private partnerships between developers and regional and/or local government for the redevelopment of underutilized land.
- Advocate for the region to form public-private partnerships with developers to extend public infrastructure systems in exchange for pre-defined conditions.
- Advocate for the city to form public-private partnerships with developers to invest in public facilities and infrastructure in exchange for pre-defined conditions.

EXAMPLE TACTICS

- Determine current demand for community services, and forecast future population growth and demographics.
- Plan for park spaces and community facilities for the current population and projected growth.
- Partner with community organizations, such as school boards, early in the process to inform them of the planned development and to ensure the needs of future demographics are met.
- Encourage the protection, enhancement and restoration of green infrastructure.

GUIDING PRINCIPLE #2

Focus on planning for future services and infrastructure, and ensure sustainable development.

Strategy #2: Integrate smart city infrastructure into the development of the mTSAs.

POTENTIAL ACTION 1

Transform Burlington into a data-driven city.

POTENTIAL ACTION 2

Develop a smart city strategy and action plan for the MTSAs.

POTENTIAL ACTION 3

Partner with energy and technology services companies to pilot innovative projects in key employment areas.

EXAMPLE TACTICS

- Develop and acquire standardized and reliable data and data infrastructure.
- Develop a comprehensive database for the city, with open and accessible data.
- Obtain the World Council on City Data Certification.
- Invest in smart technology to collect and analyze infrastructure and behavioural data to improve city services.

EXAMPLE TACTICS

- Identify smart city features, such as a smart electricity grid, electric chargers, smart traffic lights, public Wi-Fi-enabled areas, etc. to integrate in the development of the MTSAs.
- Advocate for smart city features and initiatives in the MTSAs.
- Ensure developers consider smart city features prior to planning for development.
- Advocate for a digital customer service platform for the submission of development applications and updates on the approvals process.

EXAMPLE TACTICS

- Identify key stakeholders and interested parties.
- Brainstorm potential innovative pilot projects to implement in the MTSAs, such as a district energy plan, smart streetlights, solar energy, etc.
- Advocate for regional and municipal governments to implement innovative community waste collection infrastructure.

GUIDING PRINCIPLE #2 Focus on planning for future services and infrastructure, and ensure sustainable development.

Strategy #3: Encourage sustainable forms of development in the mobility MTSAs.

POTENTIAL ACTION 1

Advocate for flexible policies to allow for higher density and greater mix of employment uses.

POTENTIAL ACTION 2

Develop a strategy to ensure developments integrate low (or net zero) carbon and resilient energy systems.

POTENTIAL ACTION 3

Advocate local and regional governments to invest in brownfield redevelopment, innovative sustainability solutions and climate resiliency.

EXAMPLE TACTICS

- Determine target employment density and uses for the MTSAs.
- Conduct a compatibility analysis for target employment uses.
- Advocate for land use policies and zoning regulations that accommodate retail, office, compatible light industrial and residential uses in a building.

EXAMPLE TACTICS

- Partner with Burlington Hydro and the City of Burlington to identify potential locations and target customers for a district energy plan.
- Implement and promote district energy in high-priority areas of the MTSAs to attract investors and top business tenants.
- Implement a future-thinking energy demand system and develop creative management solutions for energy stability.
- Promote and encourage (or incentivize) low carbon building solutions such as geothermal, solar photovoltaics and solar thermal, solar walls, passive house building design and energy storage.
- Recognize builders who design and develop projects that are resilient and have low carbon footprints.

EXAMPLE TACTICS

- Identify underutilized employment lands across Burlington.
- Establish a Community Improvement Plan for redevelopment of brownfield industrial areas, and high-density office development.
- Incentivize zero-carbon buildings in the mobility MTSAs.
- Develop a liability policy limiting city responsibility for environmental damage on sites caused by business operations.
- Integrate climate adaptation strategy in the implementation of the MTSAs.

|GUIDING PRINCIPLE #3 Develop a unique identity for each MTSA and a marketing brand focusing on attracting people and talent to the area.

Strategy #1: Enhance the existing heritage, cultural and natural features in the mTSAs

POTENTIAL ACTION 1

Identify and promote heritage, cultural and natural assets in the community in partnership with local agencies and organizations.

EXAMPLE TACTICS

- Develop a map of key heritage, cultural, and natural features in the MTSAs.
- Integrate significant features in the development of a unique brand for each MTSA through the Branding and Marketing Strategy.
- Promote cultural and natural features to encourage future businesses and workforce to locate within the MTSAs.
- Use an ecosystem approach to designing and developing the MTSAs –integrating the benefits from nature for humans.
- Work with BIAs, Tourism Burlington and Parks and Recreation to foster activities that are attractive to the future workforce.
- Develop and market a mobile app to showcase points of interest and promote city events and cultural activities.

POTENTIAL ACTION 2

Advocate for institutional and city investment in cultural infrastructure and services.

EXAMPLE TACTICS

- Advocate for the expansion of existing or creation of new BIAs.
- Advocate for more investment in BIAs, libraries and community facilities.
- Leverage community facilities for placemaking initiatives.
- Promote libraries as an event space and community MTSA.

GUIDING PRINCIPLE #3

Develop a unique identity for each MTSA and a marketing brand focusing on attracting people and talent to the area.

Strategy #2: Develop a unique place identity for Burlington based on its unique characteristics.

POTENTIAL ACTION 1	POTENTIAL ACTION 2	POTENTIAL ACTION 3
Develop a cultural and placemaking strategy for the MTSA's	Develop a business brand and a marketing strategy for Burlington that leverages and integrates the unique value proposition of the MTSA's	Create opportunities for social interactions that inspire creativity and collaboration.
EXAMPLE TACTICS <ul style="list-style-type: none"> • Encourage partnerships to develop affordable and accessible arts and cultural spaces and programs. • Advocate for seasonal retail markets in public spaces and parks. • Encourage the use of underutilized spaces between buildings for recreational and leisure activities. • Encourage the use of streets as public spaces. • Encourage pop-ups and temporary uses to activate public areas by advocating for a simplified business permitting process. 	EXAMPLE TACTICS <ul style="list-style-type: none"> • Engage key stakeholders and target audiences to determine existing perceptions of Burlington. • Identify and engage key users of the mobility MTSA's (residents, employers, employees, visitors, etc.). • Determine desired perceptions of key stakeholders and develop the Burlington brand in partnerships with BIAs. • Identify brand ambassadors, such as business owners, entrepreneurs and public figures, for storytelling and promoting the brand image. • Ensure internal and external marketing communication efforts are consistent with the brand. 	EXAMPLE TACTICS <ul style="list-style-type: none"> • Advocate for 24/7 programming in key areas of the MTSA's. • Collaborate with newcomer organizations and Indigenous groups to develop cultural programming. • Encourage community gardens and rooftop amenity spaces in the MTSA's. • Partner with local cultural boards and organizations to develop a programming strategy inclusive of key employment areas, and advocate for a lead organization to execute strategy. • Encourage and assist in events and activities that animate key nodes and streets, and indoor public facilities.

GUIDING PRINCIPLE #3

Develop a unique identity for each MTSA and a marketing brand focusing on attracting people and talent to the area.

Strategy #3: Develop an employment attraction strategy to attract talent and investment in the mTSAs.

POTENTIAL ACTION 1

Actively promote investment in the MTSA through attracting global development and employment interest.

EXAMPLE TACTICS

- Promote the MTSA as a destination for Foreign Direct Investment through the Branding and Marketing Strategy and in partnership with local and regional trade organizations.
- Leverage existing sister-city relationships to attract international investment and businesses.
- Form new international economic partnerships to attract international investment and businesses.
- Leverage Halton Region's Newcomer Strategy and Burlington's future economic migrant outreach and liaison office to attract investors and entrepreneur class immigrants and businesses.

POTENTIAL ACTION 2

Ensure a smooth development and business permitting process to ensure investment timelines for businesses are met.

EXAMPLE TACTICS

- Advocate for an expedited, streamlined development process for employment-focused developments.
- Advocate for a site-specific Community Planning Permit System in strategic areas of the MTSA, and integrate it into the official plan policies and zoning bylaw regulations.
- Advocate for streamlining the business permitting process.
- Advocate for an automated business permitting system for issuing business permits and permit renewals.
- Advocate for an expedited business permitting process for short-term pop-up retailers.
- Establish an implementation team dedicated to the mobility MTSA.

GUIDING PRINCIPLE #4

Identify key employment growth areas in the MTSAs and market to the future workforce and industries.

Strategy #1: Strengthen key employment sectors.

POTENTIAL ACTION 1

Strengthen key local and regional employment clusters.

EXAMPLE TACTICS

- Analyze existing business data and identify dominant industries and niche clusters in Burlington and Halton Region.
- Target and promote key local and regional employment clusters in the MTSAs.
- Encourage partnerships between businesses to strengthen cluster network.
- Partner with post-secondary institutions to develop a cluster-based talent strategy.

POTENTIAL ACTION 2

Develop and market unique value propositions for key employment sectors through the Branding and Marketing Strategy.

EXAMPLE TACTICS

- Create an accessible, data-comprehensive community profile for the city highlighting its quality of life and business environment.
- Market Burlington's quality of life to attract businesses and talent.
- Reduce bureaucratic red tape for businesses to start-up and/or expand in Burlington.
- Reduce bureaucratic red tape for businesses to start-up and/or expand in Burlington.

POTENTIAL ACTION 3

Identify and develop solutions to business issues in key sectors.

EXAMPLE TACTICS

- Engage stakeholders from key industry sectors to determine some of the major issues they have encountered in doing business in Burlington.
- Determine and advocate for innovative potential solutions in partnership with industry experts, and local and regional governments.

GUIDING PRINCIPLE #4

Identify key employment growth areas in the MTSAs and market to the future workforce and industries.

Strategy #2: Diversify the economy by encouraging external businesses to locate in Burlington.

POTENTIAL ACTION 1

Develop a strategy to attract desirable businesses supported by creative talent.

EXAMPLE TACTICS

- Engage target businesses to determine their needs and requirements.
- Match target businesses with target employees, and develop a talent attraction strategy.
- Partner with post-secondary institutions to provide businesses with easy access to talent.
- Market Burlington Economic Development's position as a referral partner for federal immigration programs, including the Global Skills Strategy and Dedicated Service Channel to attract foreign talent and businesses.
- Advertise and promote investment opportunities for new immigrants.

POTENTIAL ACTION 2

Attract local and foreign entrepreneurs, and encourage entrepreneurship among Burlington residents.

EXAMPLE TACTICS

- Leverage TechPlace's LaunchPad and Soft Landing programs to provide innovative businesses with start-up support and community resources.
- Partner with coworking organizations such as Nuvo Network, WeWork, and OnePlan to ensure flexible footprint options are available for companies of various sizes.
- Develop a strategy to leverage and attract businesses testing the Burlington market through coworking and short-term spaces.
- Target and attract businesses that have a significant number of remote workers in the city.
- Partner with Regional Innovation Centres and the Halton Small Business Centre to deliver business resources and support to entrepreneurs.

GUIDING PRINCIPLE #4

Identify key employment growth areas in the MTSAs and market to the future workforce and industries.

Strategy #3: Attract and retain talent desired by key employment sectors in the mTSAs.

POTENTIAL ACTION 1

Advocate for housing affordability that reflects the general level of housing prices relative to the general level of household incomes.

EXAMPLE TACTICS

- Promote existing regional financial incentives to potential investors and developers interested in including affordable housing in their development.
- Leverage the city's planned housing strategy to attract young talent and newcomers.
- Encourage and subsidize development of rental housing.
- Encourage development of various types of housing and ownership models.

POTENTIAL ACTION 2

Encourage the development of amenity-rich, flexible workplaces desired by the future workforce.

EXAMPLE TACTICS

- Advocate for flexible employment units and coworking spaces in the MTSAs.
- Invest in local and regional transit to attract and provide easy access to talent in Burlington.
- Attract service commercial and retail uses in proximity to high-density employment areas.
- Advocate for government, developers and businesses to dedicate public park space in employment areas.

POTENTIAL ACTION 3

Develop a post-secondary attraction strategy.

EXAMPLE TACTICS

- Actively promote the MTSAs to post-secondary institutions for a potential satellite campus.
- Partner with post-secondary institutions to provide research and internship opportunities for students.
- Leverage post-secondary relationships with international post-secondary institutions to attract foreign talent and develop economic partnerships.

GUIDING PRINCIPLE #5 Integrate the MTSAs into the city fabric and provide seamless transportation connectivity.

Strategy #1: Encourage alternative modes of transportation in partnership with government agencies.

POTENTIAL ACTION 1

Encourage employers to establish transit incentive programs.

EXAMPLE TACTICS

- Analyze successful case studies of employer transit incentive programs.
- Advocate employers to provide financial incentives to employees using active modes of transportation.
- Advocate employers to invest in a transit shuttle service for employees in partnership with other businesses in areas where public transit is unavailable.
- Advocate employers to provide free or subsidized transit passes to employees in exchange for reduced parking spaces.
- Advocate for the use of maximum parking standards for employment uses and flexible parking regulations for employers promoting alternative transportation modes.

POTENTIAL ACTION 2

Advocate for an interim, transitional parking strategy.

EXAMPLE TACTICS

- Educate businesses of alternative transportation modes, and advocate for them to provide incentives to employees who do not require a parking space.
- Advocate for the city to construct a parking structure as a short-term solution for existing parking demand.
- Advocate for Metrolinx to invest in local transit in return for reduced parking costs long-term.
- Advocate for Metrolinx to redevelop surface parking for a transit-oriented development, and/or develop structured parking.
- Establish policies to encourage above-ground convertible parking inside buildings.
- Explore opportunities to partner with residential developers to allow nearby businesses to utilize empty parking spaces during the day.

POTENTIAL ACTION 3

Partner with local and regional transit agencies to pilot alternative transit modes in the MTSAs.

EXAMPLE TACTICS

- Pilot innovative transit projects in the MTSAs, such as autonomous shuttles, e-scooters, car-share and bike-share programs.
- Form regional partnerships with transit agencies of adjacent municipalities to integrate services and align schedules.
- Advocate transit agencies to implement transit demand management strategies.
- Advocate Halton Region for a regional transit strategy.

GUIDING PRINCIPLE #5 Integrate the MTSAs into the city fabric and provide seamless transportation connectivity.

Strategy #2: Advocate for active modes of transportation.

POTENTIAL ACTION 1

Advocate for connections between transportation and open space network to encourage active transportation.

EXAMPLE TACTICS

- Determine and analyze commuting flow patterns in the MTSAs.
- Advocate the City of Burlington to extend the open space network and trails to existing transit stations and stops, and key destinations in the MTSAs.

POTENTIAL ACTION 2

Advocate for well-connected, compact development to promote active transportation in employment areas.

EXAMPLE TACTICS

- Advocate for and support transit-oriented development in the MTSAs.
- Advocate local and regional partners invest in and improve walking and cycling infrastructure in employment areas.
- Advocate Metrolinx to invest in first and last mile solutions.
- Encourage employers to develop measures to support active transportation such as on-site change rooms, showers and secure bike parking.

GUIDING PRINCIPLE #6

Engage stakeholders to develop a collaborative implementation plan for the GO Investment Corridor vision.

Strategy #1: Consult with stakeholders who are involved in or impacted by the development of the mTSAs.

POTENTIAL ACTION 1

Engage key stakeholders in the development of the MTsAs early in the process.

POTENTIAL ACTION 2

Develop an interim strategy to identify short and long term actions.

POTENTIAL ACTION 3

Develop an implementation and action plan to determine responsibilities, timelines, investments, and infrastructure.

EXAMPLE TACTICS

- Identify and consult key public and private sector stakeholders in the development of the economic vision for the MTsAs.
- Develop a strategy to engage various public groups and target demographics in the process.
- Clearly identify goals and responsibilities of each stakeholder group.
- Create communication and dialogue between stakeholders, such as Metrolinx, MTO and CNR, by hosting workshops and focus groups to determine objectives of each organization.
- Integrate feedback into the vision and implementation plan.

GUIDING PRINCIPLE #5 Integrate the MTSAs into the city fabric and provide seamless transportation connectivity.

Strategy #2: Develop effective tools and strategic partnerships to address barriers in the implementation of the economic vision for the mTSAs.

POTENTIAL ACTION 1

Examine creative tools to achieve city building outcomes.

EXAMPLE TACTICS

- Identify areas of the vision that align and areas that create conflict between stakeholders.
- Brainstorm and advocate for effective tools and mechanisms that resolve conflicting visions of stakeholder groups.

POTENTIAL ACTION 2

Establish public-private partnerships with key stakeholders to achieve the long-term vision for the MTSAs.

EXAMPLE TACTICS

- Match vision objectives with potential partnership interests (public and private sector).
- Develop key objectives, procedures, structure, and outcomes of the potential partnerships.
- Advocate for cross-sector stakeholder partnerships.

POTENTIAL ACTION 3

Maintain an ongoing dialogue with key stakeholders.

EXAMPLE TACTICS

- Develop a communication plan for internal city and external stakeholders to provide updates on modifications or delays to the project.
- Develop and share key performance indicators for the project with stakeholders and partners.



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