



SUBJECT: GO investment corridor economic vision

TO: Community Planning, Regulation & Mobility Cttee.

FROM: Burlington Economic Development

Report Number: ECDEV-01-22

Wards Affected: all

File Numbers: 125

Date to Committee: July 5, 2022

Date to Council: July 12, 2022

Recommendation:

Receive and file Burlington Economic Development report ECDEV-01-22, GO investment corridor economic vision and associated appendix.

PURPOSE:

Vision to Focus Alignment:

- Increase economic prosperity and community responsive city growth
- Improve integrated city mobility
- Support sustainable infrastructure and a resilient environment
- Deliver customer centric services with a focus on efficiency and technology transformation

Background and Discussion:

Burlington currently has a limited supply of greenfield land for development and has an opportunity to focus future growth around each of Burlington's three GO stations. The City of Burlington is developing Area Specific Plans (ASPs) for areas around the three GO Stations known as Major Transit Station Areas (MTSAs). The three MTSAs represent a significant opportunity for Burlington's growth from a residential, employment, and transportation perspective. The MTSAs provide the potential to create complete communities, expand the tax base, and provide a destination for employment growth for future generations. The MTSA developments will increase transit usage and

help to make Burlington a destination while lowering carbon emissions. Burlington Economic Development has been working with the City of Burlington to develop an employment vision for the MTSA's and an implementation plan that positions us to expand our tax base through employment attraction and branding opportunities, as well as ensuring we continue to retain key industrial employers and other employment uses associated with the MTSA's. This economic vision for the three MTSA's has been undertaken through the GO Investment Corridor Project.

The GO Investment Corridor Vision was focused on three key objectives:

- Developing an employment vision for the MTSA's that is future focused and attractive to 21st Century businesses
- Supporting the retention and integration of existing employment uses within the MTSA's
- Identifying key constraints and barriers to the MSTA Employment Vision along with recommended tools to address them

This vision lays the foundation for developing an employment attraction and branding strategy that delivers on the employment vision and will form a key part of Burlington's employment growth strategy over the next 20 years. These complete communities will contribute more local jobs in the short term and for future generations in the long term. As outlined in the table below, based on ROPA 48 density targets, Downtown Burlington UGC/Burlington GO MTSA is expected to add 7,161 new jobs by 2031 and Aldershot GO MTSA and Appleby GO MTSA are expected to add 2,582 jobs and 12,890 jobs, respectively. This totals 22,633 new jobs in the MTSA's/UGC for future generations. The Official Plan (2020) calls for a much higher level of employment growth and is expected to exceed the minimum density targets from ROPA 48. Based on a bottom-up approach using individual land use designations and proposed maximum heights in the Preliminary Precinct Plans, the Adopted Official Plan suggests 60,935 jobs will be added to the MTSA's/UGC for future generations.

		Aldershot MTSA Growth Estimate	Burlington MMTSA/UG C Growth Estimate	Appleby MTSA Growth Estimate	Total
Gross Area (ha)		86.1	102.3	179.0	367.4
ROPA 48/Growth Plan (top- down estimate)	People	10,328	13,298	8,593	32,219
	Jobs	2,582	7,161	12,890	22,633
	<i>Total People and Jobs</i>	<i>12,910</i>	<i>20,459</i>	<i>21,483</i>	<i>54,852</i>

Adopted Official Plan (bottom-up estimate)	People	24,269	20,362	10,452	55,083
	Jobs	10,401	8,727	41,807	60,935
	<i>Total People and Jobs</i>	<i>34,670</i>	<i>29,089</i>	<i>52,259</i>	<i>116,288</i>

Strategy/process

2017 – 2019 GO Mobility Hubs Economic Vision

Since 2017 Burlington Economic Development has been working in coordination with the City of Burlington on the GO Investment Corridor as an overall economic vision for the redevelopment of Burlington's Major Transit Station Areas (MTSAs).

From 2017 to 2019 the Mobility Hubs Study Team worked hand-in-hand with Economic Development to engage stakeholders on the economic vision for the MTSAs (formerly Mobility Hubs) in conjunction with work being undertaken as part of the Mobility Hubs project. While the original City of Burlington Mobility Hubs project undertook work to form recommendations for four Mobility Hubs (Aldershot GO, Burlington GO, Appleby GO and Burlington Downtown), the GO Investment Corridor has always been focused solely on the economic development potential which will be created by the redevelopment of the areas around Burlington's three GO stations (Aldershot GO, Burlington GO and Appleby GO). In early 2019, the Mobility Hubs Study was placed on pause to enable the City to address other planning priorities, such as the City's scoped re-examination of the adopted Official Plan project, the Interim Control By-law Land Use Study and the Region's Municipal Comprehensive Review (Regional Official Plan Review). In July 2021, Halton Regional Council adopted Regional Official Plan Amendment (ROPA) 48, which, among other things, set the boundaries and targets for each Major Transit Station Areas (MTSAs) in the Region. In 2021, the City resumed its work as the MTSA Area-Specific Planning Project. The project builds upon and advances the work undertaken through the Mobility Hubs Study.

From 2017 – 2019 Burlington Economic Development formed a GO Mobility Hubs Committee to help inform an economic vision and implementation plan for Burlington's three MTSAs. The committee was composed of Burlington Economic Development Board members and additional private sector stakeholders designed to bring a mix of perspectives to the table on what was needed to help make the redevelopment of Burlington's three GO Stations true mixed-use communities that would drive significant economic and employment growth for the city.

The workplan was focused on:

- Understanding the foundational context through research and best practice analysis
- Engaging key partners in an Advisory Committee to guide the development of the vision
- Engaging all stakeholders to understand the current and future situational context
- Developing a vision and an implementation plan that is based on research, engagement and a firm understanding of the Strengths, Weaknesses, Opportunities and Threats

From 2016-2019 the following foundational research and analysis took place:

- **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. This study finds that the office workplace is rapidly evolving with employers and employees preferring mixed-use, amenity-rich, and transit-oriented environments with flexible interior configurations and reduced footprints. However, financial incentives are required to encourage commercial developers to build in brownfield / mixed-use areas.

- **Mobility HUBs - 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 mobility hubs.

- **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 employment lands as well as in mixed-use areas, such as the mobility hubs. This study finds that traditional industrial users prefer greenfield areas, where businesses can easily expand – these users are moving further west of the GTA. However, Burlington's mobility hubs are attractive environments for high-tech and advanced industrial users that require smaller footprints and operate with minimal disruption to surrounding uses.

- **Burlington Mobility Hubs Employment Targets Study (Watson & Associates, 2019).**

This study explores long-term employment growth and non-residential development potential in the mobility hubs by sector and examines the intensity of development that should be targeted based on market-based analysis. The future growth forecasts in this study have since become obsolete due to the revised growth forecasting work undertaken by the Region of Halton.

- **Stakeholder Engagement**

Over 40 one-on-one interviews took place to help inform the GO Mobility Hubs Employment Vision. The first phase of the stakeholder consultation focused on market groups, including realtors, developers, existing businesses and landowners within the MTSA's. The second phase of the stakeholder consultation focused on public organizations, including municipal, regional and provincial partners. These interviews were used to inform the development of key themes, a SWOT analysis, guiding principles and implementation recommendations.

A number of GO Mobility Hubs committee meetings took place from 2017-2019 to help guide and inform the project. In December 2018 a joint workshop took place between members of Burlington Council and the Burlington Economic Development Board of Directors to review preliminary directions and key future opportunities and challenges identified through the Mobility Hubs – Office and Retail Market Analysis Study. The draft GO Mobility Hubs Economic Vision was presented to the Burlington Economic Development Board of Directors in June 2019. Subsequently the project was placed on hold in line with the City of Burlington Mobility Hubs project while the City of Burlington undertook the scoped re-examination of the Official Plan and other related projects.

2021 - 2022 MTSA Area Specific Plans and GO Investment Corridor Vision

In 2021, the City relaunched the development of area-specific plans (ASPs) for the Major Transit Station Areas (MTSAs), formerly known as the Mobility Hubs Study. The City is developing ASPs for each MTSA which will consider and include policies and guidance related to urban design, jobs, housing, servicing, public transportation, parks and green space. The 2018-2022 From Vision to Focus document identifies the completion of ASPs as a key action to achieve responsive growth management during the current term of Council.

In coordination with the City of Burlington Policy & Community Team, Burlington Economic Development resumed the GO Mobility Hubs Economic Vision work rebranded as the GO Investment Corridor Vision. The expanded vision encompasses

key employment areas along the QEW corridor, including the three GO MTSAs. The GO Investment Corridor Economic Vision is an evolution of the Mobility Hubs work and is informed by previous studies.

To support this work a new GO Investment Corridor Committee was formed with expanded membership to represent key stakeholder groups and areas of expertise including:

- Industrial, commercial, institutional (ICI) / mixed use Real estate
- ICI / mixed use land development
- Urban planning
- Post-secondary partnerships
- ICT and professional services
- Talent attraction and retention
- Marketing and branding
- Landowners within MTSAs and adjacent areas

The committee met three times from 2020 – March 2021 to provide strategic guidance including reviewing research and studies that informed the GO Investment Corridor Economic Vision, providing their expertise as it relates to the economic vision for the area; and advising on the goals and key recommendations of the GO Investment Corridor Economic Vision.

New research and stakeholder engagement that took place to inform the updated and expanded GO Investment Corridor Vision included:

- **The Future of Work Study (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.

- **Stakeholder Engagement on changes since 2019 which should be incorporated into the vision including the impacts of COVID-19.**

The following key themes were integrated into the updated vision.

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.

Coworking 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.

Integrating Current Businesses: Current industrial businesses benefit from the transportation infrastructure found in and around the MTSAs, 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.

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.

Office Spaces: Office spaces are changing, and although cubicles are useful for social distancing, they are expected to quickly change after COVID-19 is over. Businesses are also requiring less space for employees because of remote working arrangements. There is a lot of uncertainty surrounding future office demand and office market recovery.

In addition, the following policy developments and their implications for the GO Investment Corridor Vision were reviewed.

- **Interim Control Bylaw (ICBL)**

On Jan. 30, 2020, Council approved the revised recommendations from the findings of the Interim Control Bylaw (ICBL) Land Use Study, including the approval of the proposed Official Plan and Zoning Bylaw Amendments resulting from the ICBL Land Use Study. The City received 31 appeals to the Local Planning Appeal Tribunal (LPAT) (now, Ontario Lands Tribunal (OLT)) for both the Official Plan Amendment 119 and Zoning Bylaw Amendment 2020.418. Because of these appeals under the Planning Act, the ICBL remained in effect. Since that time, it considered and granted a number of motions to find that the Zoning Bylaw Amendment does not apply to those sites and lifted the ICBL “freeze”. On Oct. 15, 2021, the OLT granted a motion brought by the City regarding the Interim Control Bylaw’s continued application to the City’s downtown and lands around the Burlington GO station. The motion sought to lift

the freeze on all lands subject to the Interim Control Bylaw with the exception of lands impacted by Zoning Bylaw Amendment 2020.418, which are located around the Burlington GO station. This will allow development in compliance with zoning that was in effect before the ICBL and the City will be able to issue building permits in this area and Community Planning staff will also be able to bring forward recommendations for Council decisions with respect to Planning Act applications.

- **New Official Plan**

The new Burlington Official Plan, Official Plan (2020) was approved, with modifications, by Halton Region on Nov. 30, 2020. Following the last date for filing a notice of appeal (December 22, 2020), Halton Region advised that 48 appeals had been received. While four of the appeals have since been withdrawn, the majority of the Burlington Official Plan(2020), remains subject to appeal.

- **Provincially Significant Employment Zones (PSEZ)**

On May 25th, 2019, the Province of Ontario introduced a new planning policy framework as part of the 2019 update of the *Growth Plan for the Greater Golden Horseshoe* (GGH), titled Provincially Significant Employment Zones (PSEZ). This designation is applied to employment areas throughout the GGH that are deemed critical to the local and provincial economy. The framework allows greater coordination between planning, economic development, and infrastructure investments to support investments.

- **Regional Official Plan Amendment 48 (ROPA 48)**

ROPA 48 was approved and adopted by the Minister of Municipal Affairs and Housing on November 10th, 2021. This amendment updated the Regional Urban Structure, updating land uses boundaries, restructuring key regional growth areas, and updating population and job targets for these areas. The growth areas serve to guide development and growth in the region, they include all types of land uses and are designed to be well connected to the rest of the city. ROPA 48 also re-aligned the Urban Growth Center (UGC) designation from Downtown Burlington and focused it more closely on the Burlington GO MTSA..

The Updated GO Investment Corridor vision and focused implementation recommendations were reviewed and approved by the Burlington Economic Development Board of Directors in April 2022.

Financial Matters:

Not Applicable

Total Financial Impact

Not Applicable

Source of Funding

Not Applicable

Other Resource Impacts

Identify any indirect costs e.g. staffing requirements. If none type “not applicable”.

Climate Implications

The development of the GO Investment Corridor and MTSAs will be a critical component of helping reduce Burlington’s GHG emissions as our city continues to grow by:

- Creating more options for employment in Burlington and reducing GHG emissions associated with commuting
 - Increasing options for people to arrive at work via more carbon positive options such as rail, bike and foot by encouraging employment development within MTSAs
 - Supporting the development of complete communities that reduce individual residents and employees carbon footprints by reducing the need to use the car to live their daily lives
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Engagement Matters:

Extensive engagement of the business community took place from 2017-22. This included the formation of a GO Investment Corridor Committee was formed with membership to represent key stakeholder groups and areas of expertise including:

- Industrial, commercial, institutional (ICI) / mixed use Real estate
- ICI / mixed use land development
- Urban planning
- Post-secondary partnerships
- ICT and professional services

- Talent attraction and retention
- Marketing and branding
- Landowners within MTSAs and adjacent areas

In addition over 40 stakeholders were engaged via one on one interviews and regular stakeholder engagement session took place with business, land owners, developers and commercial realtors to discuss draft directions from the vision.

Conclusion:

Coordination has been taking place with Community Planning on preliminary directions, stakeholder engagement and draft recommendations from the GO Investment Corridor Vision since its inception in 2017. The recommendations from the vision have been fully integrated by Community Planning as part of every report that has gone to City of Burlington Council on the MTSAs and the presentation of the GO Investment Corridor vision in coordination with upcoming reports on the MTSA ASPs will help reinforce the specific actions needed to achieve the economic vision for the MTSAs. As part of the strategic planning cycle the GO Investment Corridor Vision will become a foundational document for both the renewal of the Burlington Economic Development 2023-2026 Strategic Plan, the new Council Workplan 2022-2026 and the updated City of Burlington Strategic Plan 2050. Recommendation and actions outlined in the GO Investment Corridor Vision will help Burlington to achieve truly complete mixed use communities at our MTSAs that provide new employment destinations for businesses and residents.

Respectfully submitted,

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Appendices:

- A. GO Investment Corridor Vision

Report Approval:

All reports are reviewed and/or approved by Department Director, the Chief Financial Officer and the Executive Director of Legal Services & Corporation Counsel.