

JETS & JOBS

SUMMARY OF FINDINGS FROM THE TARGETED STAKEHOLDER CONSULTATIONS BY THE INDEPENDENT ADVISOR ON THE ECONOMIC DEVELOPMENT OF THE PICKERING LANDS

by Dr. Gary Polonsky

Presented to the Honourable Marc Garneau, Minister of Transport

June 2016

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LETTER TO THE HONOURABLE MINISTER OF TRANSPORT

Dear Minister,

I have the honour to submit *Jets and Jobs: Summary of Findings from the Targeted Stakeholder Consultations by the Independent Advisor on the Economic Development of the Pickering Lands.*

The Report is the product of interviews with 5 sets of stakeholders with expertise and opinions as to what should happen with the development lands set aside for the proposed Pickering Airport and provides recommendations on possible next steps for the federal government, as described in the Independent Advisor's Mandate.

A recurring theme in the Report is that there appear to be two opposing views as to what should happen to the 8688 acres (3561 hectares) of land.

The grassroots Agriculture/Conservation view believes this excellent farm land should be developed as a world-class agriculture industry, thereby reinforcing the need to "grow" the Eat Local movement and create many jobs in the process. As such, they believe any form of airport would be mis-motivated at best and immoral at worst. By contrast, there are people with the exact opposite view, including some elected leaders at the City and Regional municipal levels as well as business and industry representatives from Aviation, Chambers of Commerce and Boards of Trade. This group envisions as many as 60,000 good jobs, direct and indirect, and urges the Government of Canada to announce that vision.

I stress that both these sets of advocacy groups are comprised of good people – honest, smart, informed, respectful, meritorious...all the right things. Might this create a glimmer of hope, that there *might* be a path forward that respects both passions? Maybe not, but *imagine* if that could be.

The reader is encouraged to read on, including the recommendations that conclude the report.

Sincerely,
Dr. Gary Polonsky
Independent Advisor

MANDATE:

On July 31, 2015, I was named Independent Advisor to the Federal Minister of Transport, on the Economic Development of the Pickering Lands. The mandate I was given consisted in gauging the views of key stakeholders on the future economic development of the Pickering Lands, including the development of a potential airport, in order to inform future decisions by the Government of Canada.

As such, I was asked to meet, individually and in small groups, with private and public stakeholders from business development organizations, aviation sector operators, community organizations and municipal/regional/provincial governments, to which I added First Nations.

I was asked to prepare a final report to summarize key discussion input and offer views on how to move forward with the economic development of the Pickering Lands. Through the consultation process, I was supported by Transport Canada officials, as required.

Summary Biography of the Independent Advisor:

Dr. Gary Polonsky, 74, a native of Thunder Bay, moved to Durham Region in 1988 to become President of Durham College. In 2001, he was appointed (Founding) President of UOIT (University of Ontario Institute of Technology), retiring in 2006. He was named Citizen/Person of the Year by the Cities of Thunder Bay, Oshawa and Pickering, as well as Recipient of both of Queen Elizabeth's commemorative medals.

A more detailed biography of Dr. Polonsky may be found in the Appendices, enclosed.

METHODOLOGY:

I carried out consultations on behalf of Transport Canada from September 2015 to June 2016.

Transport Canada Assistance:

Transport Canada played a support role and provided background and materials as well as scheduling, logistical and technical assistance.

The background and material provided by Transport Canada included:

- A fact sheet on the history of the Pickering Lands and the management of the lands by Transport Canada since 1972
- A preliminary list of stakeholders to be consulted, divided into 4 categories: aviation, business development, conservation/agriculture and government (I was given freedom to expand the list as necessary in order to obtain a broad representation of stakeholder views)
- Questions and key areas of discussion customized for each stakeholder group to guide the consultation interviews

These documents can be found in the Appendices section.

A resource from Transport Canada's Ontario regional office was assigned to the project and assisted in the recruitment of participants, scheduling of interviews, note-taking during interviews and compiling meeting records after the interviews.

Identification of the stakeholders:

In addition to the stakeholder list provided by Transport Canada, I reached out to First Nations groups with interest in the Pickering Lands as well as to world-respected academics and leaders in aviation and agriculture. The categories and sub-categories of stakeholders are described below. A full list of individuals and organizations consulted can be found in Appendix A.

Stakeholder groups:

A. Business

- a. Banks and other financiers
- b. Real estate developers
- c. Transportation companies
- d. Business associations and chambers of commerce

B. Government

- a. Federal
- b. Provincial
- c. Regional /Municipal

C. Conservation/Agriculture

D. Aviation

- a. Airlines
- b. Airport operators
- c. General aviation stakeholders & Associations
- d. Aviation experts

E. First Nations

Recruitment:

In terms of recruitment, most stakeholders who were contacted were keen to schedule an interview to share their views on the Economic Development of the Pickering Lands. Participants from certain sub-groups proved more challenging to recruit including: airlines, banks and financiers and real estate developers. In order to facilitate recruitment of financiers and real estate developers, Transport Canada officials reached out to the Canadian Council for Public-Private Partnerships (CCPPP), a non-profit organization whose mission is to promote innovative approaches to infrastructure development and service delivery through public-private partnerships with all levels of government. The CCPPP organized two roundtable meetings with a total of 10 participants.

Transport Canada officials also reached out to airlines, resulting in two meetings. In the end, the recruitment of participants from the different stakeholder categories proved very successful and enabled me to capture key relevant viewpoints on the future development of the Pickering Lands.

Attribution:

In order to respect the privacy of individuals consulted, the present report does not attribute consultation feedback to specific individuals or organizations. Rather, the input will be attributed to a sub-category of stakeholders, to enable the reader to have a general idea of the views of each given sub-category and compare between the various sub-groups consulted.

Preparation for the interview:

Participants were sent background materials for context as well as a list of questions and potential topics for discussion (see Appendices C and D). Stakeholders were also provided with the option of submitting their input in writing, in response to the list of questions. 19 stakeholders availed themselves of this option. Regardless of whether a written submission was received, notes were taken during all interviews and later compiled into a summary meeting note.

The interviews:

Interviews began in November 2015 and concluded in April 2016. In total, 64 interviews were conducted, in which 134 individuals participated. The majority of interviews were conducted in face-to-face meetings that took place in Transport Canada office space in Claremont (near the site of the Pickering Lands) or in Transport Canada’s North York offices to accommodate participants located in Toronto. 15 interviews were conducted at the offices of participants and 11 interviews were conducted by teleconference. As mentioned above, 2 roundtable meetings were hosted at the offices of the Canadian Council for Public Private Partnerships.

Table 1: Interview Type

Interview Type	
Face-to-face	53
Teleconference	11

Table 2: Interview Location

Interview Location	
TC Offices	36
Participants Offices	15
Other (Roundtables)	2

Interviews generally followed the following format. The session began with the introduction of all participants, followed by brief, context setting remarks where I explained the mandate given to me by the Minister of Transport and the objective of the consultations. I also indicated I had no opinion on the matter and offered the option of confidentiality. I then proceeded to run through the list of questions that were provided by Transport Canada, while also allowing the discussion to flow freely.

Compilation of input:

Once the interview phase was completed, meeting notes and written submissions were organized by categories of stakeholders. Input provided was then categorized by key topics of discussion. In order to manage the information and present key findings in this report, 6 key topics of discussion were identified.

- General vision of development on the Pickering Lands (airport or other)
- Business case / Information Gaps
- Operating /Funding Models
- Opportunities and challenges
- Role of government
- Interim development

The findings are presented in the Interviews section of the report, followed by sections that provide my Perspective, Recommendations and Conclusions.

Interpretation:

For the purposes of this report, interim development means any development and/or commercial use of the lands in the time period between the present and when the development of an airport begins, keeping in mind that construction of an airport can take 10 to 12 years.

Considering that the last Needs Assessment Study released in 2011 predicted that an airport would be required between 2027 and 2037, this would represent a very short timeframe for interim development, between 0 and 10 years. That said, aviation demand and capacity data are currently being updated through a contract that has been awarded by Transport Canada and will be completed in 2018. Results will provide updated scenarios with respect to if/when an airport will be required and what timeframe exists for other development.

CONTEXT:

To help understand the various positions of stakeholders, a brief overview of the history of the Pickering Lands is provided.

In 1972, Transport Canada acquired 18,600 acres of land, 56 kilometres northeast of downtown Toronto, in the vicinity of Pickering, Ontario. This large parcel of land became known as the Pickering Lands. The purpose for acquiring the property was to develop a second, major airport in the Greater Golden Horseshoe (GGH), to supplement Malton Airport (now Lester B. Pearson International Airport, or Pearson Airport). Then, in 1975, it was decided to halt the new airport project in favour of expanding existing airports.

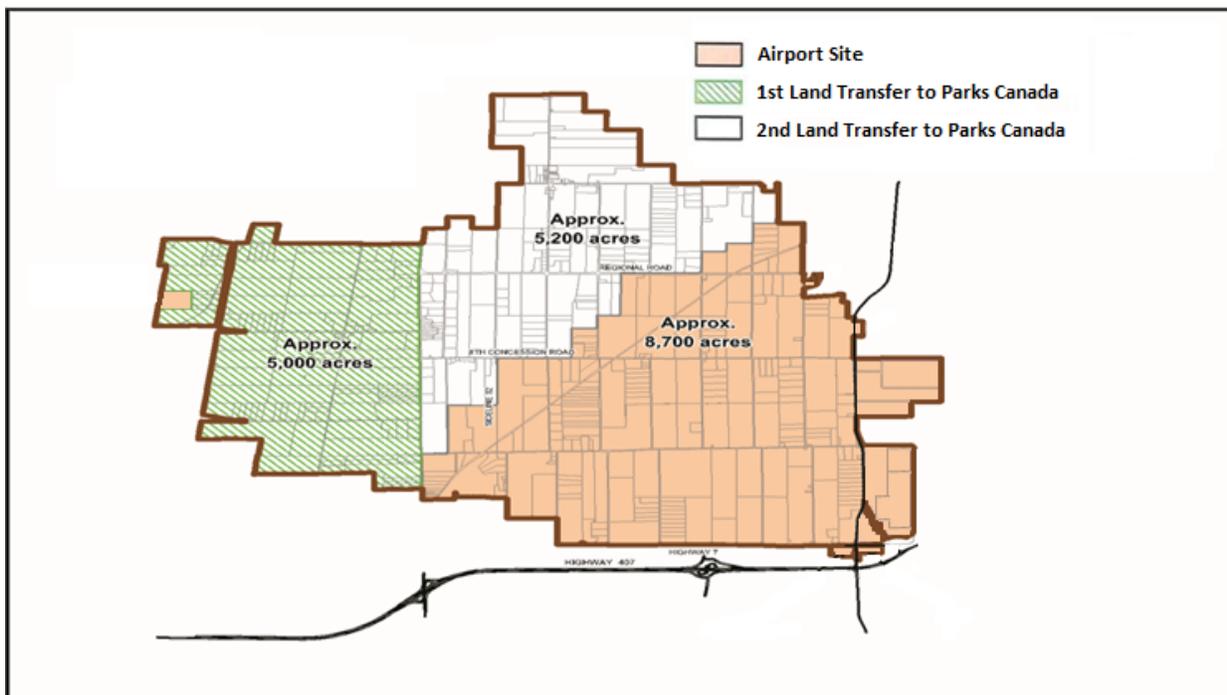
Government of Canada Announcements

Recently, the Government of Canada has made several decisions concerning the Pickering Lands. The 2011 *Speech from the Throne*, and *Budget 2012*, committed the Government to establish the Rouge National Urban Park in the Rouge Valley of eastern Toronto and Markham. This process included the transfer of 5,000 acres of the Pickering Lands to the Parks Canada Agency on April 1, 2015. Then, in June 2013, the Government of Canada formally announced a balanced approach for the future of the Pickering Lands, including the land transfer to the Parks Canada Agency, a smaller 8,700-acre site reserved for a future airport, and some economic development on the remaining 5,200 acres. In July 2015, the Government of Canada announced it would contribute an additional 5200 acres of the Pickering Lands to expand the Rouge National Urban Park.

Pickering Lands Airport Site Property Description

Today, the Pickering Lands airport site is comprised of 414 distinct land parcels and is approximately 8,700 acres in size. The land parcels vary in size from small to large, hosting everything from tiny “pioneer” cemeteries, to golf courses and large farming operations. Currently the airport site has 177 agricultural leases, 46 commercial leases, and 68 residential leases.

Figure 1 - Land Uses on the Pickering Lands

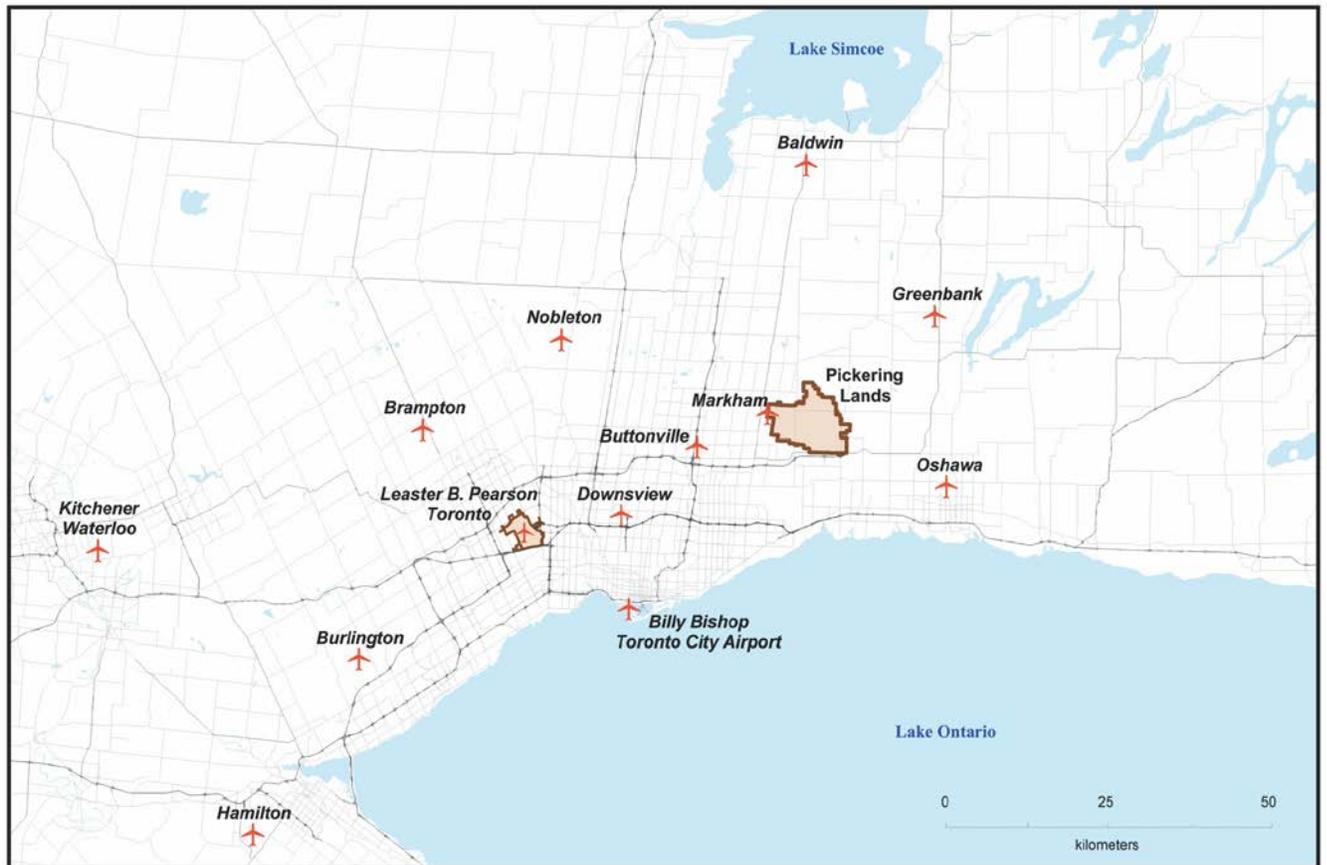


Federal Actions and Studies for the Pickering Lands

Over the years, a number of federal government strategies and studies have recommended approaches on how best to manage the Pickering Lands. The following is a chronology of these activities:

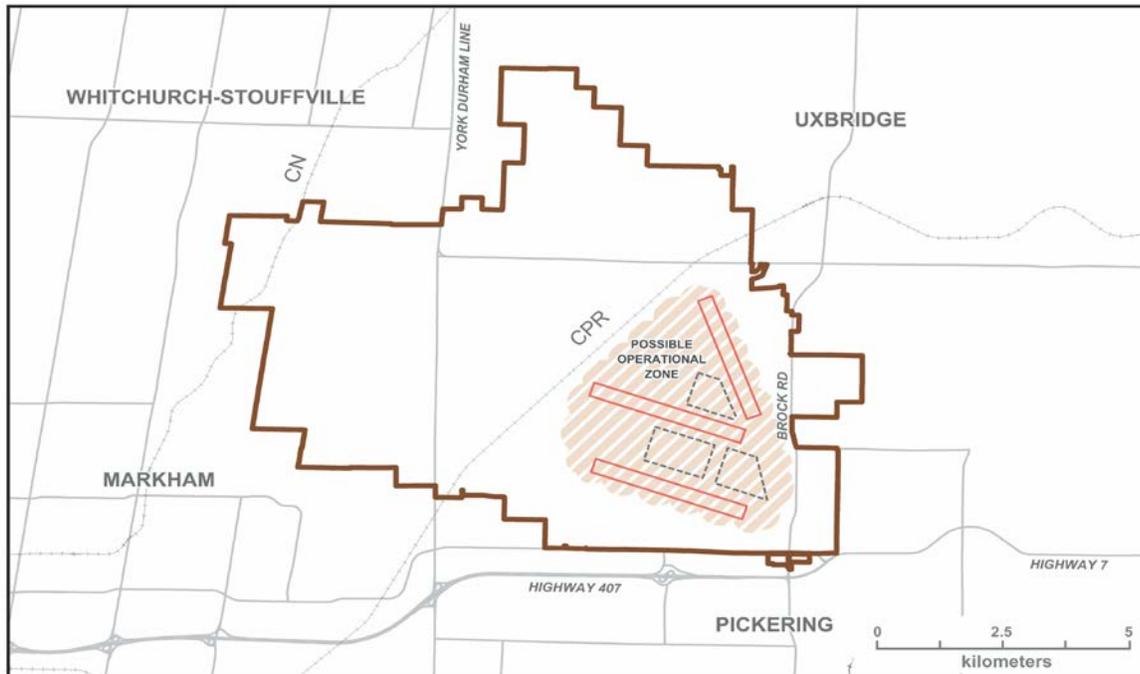
- **Pickering Airport Lands Revitalization Committee** - This committee examined strategies to maximize the agricultural potential of the Pickering Lands, and to preserve a sense of community.
- **Aviation in Southern Ontario – A Strategy for the Future** - This strategy released in 1990 by the GOC contained short-term, intermediate, and long-term measures to deal with increased air traffic in southern Ontario. A key principle of the strategy was to develop Pearson Airport to its optimum capacity and to retain the Pickering Lands if needed in the future.
- **Southern Ontario Airports Area Study** - Released in 1995, the study indicated that a system of airports would be needed to accommodate aviation demand in the GGH. More specifically, it stated that Hamilton, in the west, and Pickering, in the east, would be needed to supplement Pearson Airport, the main hub.

Figure 2 - Map of Greater Golden Horseshoe Airports



- **Pickering Airport Draft Plan Report** - This report released in 2004 proposed the construction of a general aviation airport on the Pickering Lands, which could eventually be expanded to a three-runway, regional reliever airport at a later date. Any expansion would be designed to relieve excess commercial passenger traffic from Pearson Airport.

Figure 3: Airport Footprint Depicted in the 2004 GTAA *Pickering Airport Draft Plan Report*



- **2011 Needs Assessment Study** – The Needs Assessment Study was an aviation supply demand study which projected that an additional airport will be required in the GGH area between 2027 and 2037, and identified Pickering as the prime location for this airport.

THE INTERVIEWS:

This section aims to describe the input received by group of stakeholders. A summary box has been included to highlight the main points made by each stakeholder group.

BUSINESS STAKEHOLDERS:

SUMMARY OF BUSINESS STAKEHOLDER POSITIONS

*Banks and Financiers * Real Estate Developers * Transportation Companies * Trade Associations*

On a vision for the Pickering Lands:

- Significant level of interest from business stakeholders to be involved in the development of an airport
- Would need to see a long term master plan to confirm interest

On Business case & information gaps:

- Emphasized the need for a strong business case including data on revenue-generating potential to help justify investments

On operating and funding models:

- Majority recommended a P3 model
- Advocated for an inclusive and phased approach – multiple modes of transportation, multiple stakeholders

On opportunities / challenges:

- Identified an opportunity for job creation and reduction of congestion in the GTA

On the role of government:

- Emphasized importance of Government's firm commitment, transparent communications and community engagement on this project

On interim development:

- Business stakeholders felt that the timeframe was too short for interim development and cautioned against any development that could jeopardize future airport development

Business stakeholders were consulted with a view to gauging the level of interest of the private sector in a potential airport project and/or interim development on the Pickering Lands. Views were also sought as to how a potential airport should be funded and operated, and what key information needed to be provided to make a good business case for an airport and attract investors. Business stakeholders include 4 different subgroups: 1) Banks and other financiers, 2)

Real estate developers, 3) Transportation companies; and 4) Business associations and chambers of commerce.

1. **Banks and Financiers:**

On a vision for Pickering Lands:

In general, banks and financiers were favourable to an airport project and predicted that private sector investors would be interested as long as there was a clear, market-driven vision and that the project was phased out over a long enough term to provide investors with sufficient time and flexibility to generate return on investment.

Some suggested a phased approach where initially a potential Pickering Airport could replace Buttonville Airport and grow. They promoted community engagement, a consultative process, and stressed the importance of connectivity to make it easy to reach the airport. Many mentioned the role of a potential airport in resolving the important congestion and commuting issues within the GTA.

On building a business case / information gaps:

Banks and financiers stressed the importance of timing and the risk associated with building too soon or too late. Building too soon, before the capacity shortfall warrants it, could create a situation where investors would be asked to put up major capital investment but have no immediate returns. That would be difficult for investors to manage and would likely deter many from being involved. This is why it is essential to have updated forecasting data on aviation demand and capacity to get the best possible estimate on timing for an airport as well as develop a multi-phase strategy for the Pickering Airport.

According to financiers, the biggest information gap at this time is the uncertainty with respect to the planned development of the lands. Investors will not show interest unless there is a government decision.

On operating and funding models:

In terms of operations, financial stakeholders mentioned the need to coordinate and distribute traffic within the GTA, whether through one common airport authority or other mechanism. In terms of capital funding, all supported a P3 model for the airport as well as some commercial developments associated with it.

It was mentioned that one bank would likely not take on financing a project of this magnitude on its own but rather as part of a syndicate of banks and non-bank entities.

The group described options within a P3 funding framework, depending on what government and financiers agreed was best. One approach, for example, is to finance the entire project through P3. Another is for government to fund the first phase, for example, a general aviation airport to replace Buttonville and perhaps build the runways, and for P3 to take over from there.

The group emphasized that building a new airport is very expensive and that revenues are not guaranteed. Forecasts are not always accurate and air travel is affected by many factors. That is why it is key to have a long-term scope for the project and to develop it in phases, to ensure return on investment. Another risk identified is that private sector interest is not guaranteed and will depend on the business case, timing and sound planning.

On opportunities:

One bank representative mentioned that banks would likely have interest in being the “official bank” of the airport with certain exclusive rights, as CIBC is now with Pearson, and this could represent an incentive to get involved in the Pickering airport project.

On the role of government:

Banks and financiers acknowledged Transport Canada’s key role in ensuring complementary and successful airports within the GTA, and in building the business case for a Pickering Airport. This would include taking the necessary steps to validate the need for an airport from a capacity and demand standpoint and demonstrate the benefits for the community such as job creation and reduction of vehicular congestion in the GTA. One stakeholder mentioned the federal government should be instrumental in the vision, design and RFP for the airport project.

On interim development:

The group expressed that without data on timing for an airport, it would be extremely risky to consider interim activities on the airport lands. Any development would be difficult to remove in a potentially short timeframe and could jeopardize future airport development. They recommended that the federal government first assemble the data required to make a decision on the long-term development of the Pickering Lands.

In addition, the current timeframe for interim development does not allow for long-term leases which are generally required by the private sector in order to generate return on investment.

2. Real estate developers:

On a vision for the Pickering Lands:

In general, developers looked favourably on a potential airport on the Pickering Lands, provided that market demand is demonstrated and that sound planning is undertaken. Many stakeholders shared a vision of the federal lands becoming an “Employment Zone”, a multi-modal transportation hub where the airport is only one component of economic development that would create thousands of jobs and help cut down congestion in the GTA.

All real estate developers interviewed recommended a phased approach and a long-term scope for the airport project.

On building a business case / information gaps:

The developers mentioned the importance of demonstrating the need for an airport with sound data and taking an inclusive approach to the forecasting, including other modes of transportation, such as high-speed rail and road infrastructure.

In terms of information gaps, the developers mentioned the lack of commitment and clarity from the federal government. In their view, once a firm commitment is announced, potential partners for the airport project will emerge and show substantive interest.

On operating and funding models:

In terms of operating model, some real estate developers mentioned the need for an overarching body to oversee the project as a whole, including the employment lands and airport development. The Gordie Howe International Bridge was cited as a potential model, where an authority was set up by the federal government to oversee a P3 for construction and operation.

Some developers expressed interest in operating the airport and commercial development surrounding it. Some have developed detailed scenarios for developing the Pickering Lands.

Some stakeholders applauded the GTAA’s management of Pearson International Airport and extrapolated that having one airport authority to coordinate traffic within the GTA airports system may be a good idea. However, there was no consensus on this issue and most showed openness to independently run airports. The determination of the most appropriate governance model would depend largely on the strategic role identified for Pickering Airport.

In terms of funding model, all expressed that some variation of a P3 model would work, as the lands are federally owned and regulated, and building and operations could be undertaken by the private sector.

On key opportunities:

The developers foresaw significant job creation in the Eastern GTA and noted the skilled workforce located there.

Another opportunity mentioned is incorporating innovative, emerging and sustainable / green technologies for transit planning and airport construction and that this could help attract investors and developers to the project, in addition to facilitating community buy-in. Research and educational partnerships with local colleges and universities were also mentioned.

Some interviewees also raised that once the Rouge National Urban Park became well-developed as a major visitor center, a neighbouring airport would enhance access for far-flung visitors.

On key risks and challenges:

Developers noted risks around the complexity of aviation forecasting and recommended a phased, holistic approach, considering the impact on aviation demand of potential developments such as high-speed rail between Ottawa, Toronto and Montreal.

Another factor identified as a risk is the number of airports in the area and the need for cooperation and coordination among them.

Some also felt that the development in Seaton and the Rouge National Urban Park could increase local opposition to an airport, once residents and park operations are in place.

On the role of government:

In essence, the group of developers noted that the federal government's role in this project is to do what is required to reach a sound decision, announce a firm commitment and end the uncertainty that has stifled development on the Pickering Lands. The expectation of this group is that government would take steps to bridge information gaps, especially updated information on aviation demand and capacity, and, if the results of the analysis support it, develop a business case and master plan for a Pickering Airport.

Government could also be called to play a coordination role on governance model and coordination within the system of airports in southern Ontario.

On interim development:

Developers expressed that now is the time to plan phased development for a potential airport project and employment lands. In their view, the timeframe would be too short for “interim development”.

3. Transportation companies

On a vision for the Pickering Lands:

Transportation companies did not express an official position or vision for the Pickering Lands. Rather, they expressed that depending on the business case and strategy put forward for a potential airport, they could play a role in planning and developing complementary transportation that would improve access to the airport, whether for goods (cargo), people (passengers), or both.

On building a business case / information gaps:

Transportation companies identified an information gap with respect to the potential role of an airport on the Pickering Lands. Decisions on a strategic role of a new airport are essential to determine the involvement and impact on transportation companies.

On operating and funding models:

Transportation companies indicated that a P3 would likely be the best financing model for such a project. On airport governance, the group indicated that an integrated approach is required that includes all transportation modes. No comments were provided as to a preferred operator or operating model.

On key risks and challenges:

One of the risks identified by the Transportation companies is inaction and the potential for aviation demand to continue to grow without having the airport in place to serve as a reliever. A reliever airport would be designed to receive excess demand or specific types of traffic from a main airport that has reached its maximum capacity.

The group also identified a challenge with respect to connecting the different transportation modes around the airport. For example, significant investment and planning would have to go into bringing the rail lines to capacity for inter-airport transfers or passenger commute to the

airport. These components of the airport project will need to be carefully planned with a long-term scope.

On the role of government:

According to Transportation companies, the role of the federal government is to continue to protect aviation options and to make decisions that will bring social benefits, as soon as feasible.

4. Business associations and chambers of commerce

On a vision for the Pickering Lands:

Local trade associations unequivocally support the development of an airport and encourage immediate decisions by the Government to support this project. In their view, the development of an airport can bring significant job creation and economic prosperity to the region. They believe that Durham and neighboring regions are well-positioned, with three post-secondary institutions, to supply qualified workforce for the construction and operations of an airport and related commercial activity and to conduct related, important research.

On building a business case / information gaps:

Local trade associations mentioned the need for updated data to inform long-term (10 to 25 years) planning and to include a broad range of business and community stakeholders in the process. The possibility of an over-arching planning body with a senior chairperson was also mentioned.

On operating and funding models:

In terms of funding models, the trade associations supported the idea of a P3 and expressed that many business development companies (their members) would be interested in opportunities to invest.

No specific comments were provided as to the operation of the airport. Rather, the comments focussed on how the project should be initiated. This included the importance to plan in a transparent, collaborative manner including many stakeholders to ensure that roads, sewage, water, rail, long-term supporting infrastructure and other important components are taken into consideration at the onset of the project.

On key risks and challenges:

Local trade associations indicated that there is a risk with respect to lack of coordination and good planning in this project, as well as a risk of misinformation and lack of transparency. They stressed the importance of community engagement, sharing information, being inclusive.

On the role of government:

According to local trade associations, the role of the federal government is to make a decision on an airport as quickly as possible and to ensure the appropriate communications follow. In their views, continued community engagement and transparency will be key.

On interim development:

Trade associations mentioned that the timeframe is too short to plan for interim development and that this could potentially jeopardize future airport development. They recommended that the federal government first make a decision on the long-term development of the Pickering Lands.

GOVERNMENT STAKEHOLDERS:

SUMMARY OF GOVERNMENT STAKEHOLDER POSITIONS

*Federal * Provincial * Regional / Municipal*

On a vision for the Pickering Lands

- A majority of regional and municipal stakeholders consulted envision the development of an airport as an economic catalyst for the region, creating jobs and economic growth
- A majority of federal stakeholders consulted support agricultural economic development

On building a business case / information gaps

- Consensus on the need for a strong business case and data to support any decision

On operating /funding models:

- Those who favor the development of an airport would envision a P3 model and would prefer to see the new airport independently operated, while ensuring coordination within a system of airports

On opportunities and challenges:

- Significant opportunities exist to leverage the Pickering Lands to generate economic growth in the region

On the role of government:

- Elected officials, both for and against a Pickering airport, stressed the importance of respecting their mandate from constituents and want a decision to be made on development of the Pickering Lands as soon as data permits
- Transparent communications and community engagement are key
- Significant level of interest from different levels of government to be involved in this project

On interim development:

- Stakeholders see agricultural activities as suitable interim development

Government stakeholders were organized into 3 different subgroups: 1) Federal government (mainly elected Members of Parliament for the ridings around the Pickering Lands), 2) Provincial government (current MPP's did not respond but officials of various ministries were consulted) and 3) Regional or municipal governments in the area around the Pickering Lands.

1. Federal Government:

Federal government stakeholders interviewed included elected Members of Parliament (MPs) from the ridings in and around the Pickering Lands. The consultation process began after the October 2015 Federal Election.

On a vision for the Pickering Lands:

Of the five MPs interviewed, the four closest to the subject lands interpreted their mandate from constituents during the recent election campaign as being opposed to an airport, and expressed the need to respect that mandate. One stated so in particularly heartfelt language. On the other hand, all four acknowledged that they could not permit the GTA to face an aviation capacity shortfall and would assess all options as necessary.

These four MPs were not just anti-airport; they had an alternative, economic vision, namely leveraging prime farmland as an alternative to an airport. They mentioned that their position is based on what they have heard from their constituents and the significant outreach undertaken by agriculture/conservation advocacy groups before and during the election campaign.

The fifth MP was favorable to the development of an airport and communicated a vision of developing a General Aviation airport as a starting point, geared to expand in response to market demand.

On building a business case / information gaps:

Four MPs indicated that there is a need to explore all possible options for development on the Pickering Lands. Also, they believed that if there is a shortfall in aviation capacity, it would be important to consider expanding / modifying the role of existing airports before deciding to build a new airport. They agreed that it was important to provide a solid business case to support any decision. At this point, in their opinion, a business case has not been developed to demonstrate the need for a reliever airport.

On operating and funding:

The MP who expressed support for an airport suggested an appropriate funding model would be a P3. In terms of governance, it was suggested that a potential airport should be governed by its own authority with a board of directors composed of relevant stakeholder organizations from the community, municipalities, province and federal government.

On key opportunities identified:

Some MPs mentioned that the federal government should consider agriculture as an economic driver. They also indicated that educational opportunities may exist with an agricultural focus, for example creating a satellite campus for University of Guelph, in possible collaboration with UOIT and/or Durham College.

MPs also mentioned the opportunity to invest more in transit infrastructure rather than building a new airport to ensure rapid transit between Pearson, Hamilton and Ottawa as well as the opportunity for any new transportation infrastructure to be as green as possible.

The MP who supports the development of an airport indicated that significant opportunities would come with the development of an airport and the employment lands that would attract large companies and create thousands of high-quality jobs for the region.

On risks identified:

Some MPs raised the risk that, should an airport be built, it may not deliver on promises of being a driver of economic growth and job creation. They provided the example of some smaller existing airports which have never become growth engines for their communities.

On the role of government:

According to the MP in favor of airport development, once a decision is made to move forward, the role of federal government would be to ensure an open and transparent process for all aspects of the project. The same MP stressed the importance of all levels of government working collaboratively.

As for the MPs who do not support an airport, they saw a role for government in ending the situation of the “constant unknown” that is stopping other forms of development on the Pickering Lands.

On interim development:

MPs who do not support an airport would like to see longer-term leases for farmers as well as other means to spur agriculture development.

The MP in favor of airport development indicated that the time for a decision on an airport is now and therefore did not recommend any interim development. This stakeholder suggested that the federal government should start by immediately building a substantive General Aviation airport and facilitating development of the employment lands.

2. Provincial Government:

Feedback was gathered from provincial stakeholders through the organization of a joint meeting that included officials from 4 Ontario Ministries: the Ministry of Municipal Affairs and Housing, Ministry of Tourism, Culture and Sport, Ministry of Transportation and Infrastructure Ontario. Attempts to meet with MPPs failed.

On a vision for the Pickering Lands:

The Government of Ontario does not have an official position on the future development of the Pickering Lands.

On business case / information gaps:

All participants mentioned that more information is needed to demonstrate the need for another airport. Certain stakeholders suggested that the GTAA, with the collaboration of Transport Canada, is probably best positioned to conduct an analysis and determine if there is really a need for an airport. It was also mentioned that the GTAA's initial mandate was to manage a system of airports, although that has not materialized.

On governance:

Provincial government stakeholders mentioned that decisions on the development of the Pickering Lands will need to take into account provincial plans including: land use plans, the Growth plan, the Greenbelt plan, and the City of Pickering Development Plan. There should also be constant federal-provincial communication. In addition, the analysis to inform a decision on an airport should factor Ontario's multimodal transportation strategy, including potential, high-speed rail.

On opportunities:

One official noted that the airport could represent a benefit for the tourism industry, including the Rouge National Urban Park, and that absence of sufficient air travel capacity could deter tourists from coming to the region.

This stakeholder also pointed out that an airport could serve as a catalyst to connect the region to the city by road and rail through a project such as the Havelock rail line revitalization.

On risks / challenges:

Some officials mentioned the challenge represented by changing technologies and market forces in the transportation sector and their impact on reliable forecasting.

Others pointed out that a vital risk is government inaction or missing the appropriate timing to build the airport in order to ensure having the capacity when it is required.

On the role of government:

All agreed the federal government must ensure an open and transparent decision-making process and be inclusive of other government and community stakeholders throughout.

On interim development:

Provincial stakeholders indicated that their vision for interim development on the Pickering Lands is agricultural, in the form of on-farm economic development, based on the existing Durham Growth Management Plan. They also specified that any other interim development would need to be compatible and integrated with provincial policies and priorities.

Finally in this section, while no current MPP was interviewed, a retired MPP (and Cabinet Minister) reached out to me to voice strong support for an airport in Pickering and his belief that such an airport would represent economic transformation for Durham Region.

3. Regional / Municipal Government:

In general, regional and municipal government stakeholders were a lot closer to the issue than other stakeholders, a lot more outspoken, aware of the history and expressed clear positions on the potential development of an airport. The decision on the development of the Pickering Lands affects their functions and organizational plans directly. They also likely have heard the views of residents of the area for many years. Regardless of their point of view on future development, municipal and regional government stakeholders were united in their hopes that a decision would be imminent and there would be clarity for all stakeholders affected.

On a vision for the Pickering Lands:

About half of regional and municipal officials strongly support the development of an airport on the Pickering Lands and have a vision of an airport becoming an economic driver of growth for the region, creating thousands of jobs. The proponents of this vision would like to see the project move forward immediately and see an opportunity for the employment lands to attract large companies to locate their offices and plants in the region. These stakeholders indicated that the appropriate size and role of the airport would be a reliever airport built with potential for growth and expansion. Many stakeholders mentioned that with Buttonville Airport scheduled to close, there is a good rationale to immediately build an airport for general

aviation and perhaps some cargo movements, and to continue to protect the rest of the airport site for passenger growth as Pearson reaches capacity. Some stakeholders provided the example of Ottawa airport as an appropriate size for a potential Pickering Airport.

Some regional and municipal officials shared a different view and had a vision of the Pickering Lands being used for agriculture-focused economic development, including the development of commercial opportunities such as greenhouses, use of new agricultural technologies for better yields, crop diversification, food processing and a potential food terminal on the lands to transport goods to domestic and international markets. The proponents of this vision also mentioned the opportunity of establishing agricultural research and educational facilities on the lands. This vision would imply leasing land for 5 to 10 years and/or selling back land to farmers, and /or transferring some or all of the remainder of the lands to the Greenbelt or to Parks Canada Agency.

Other regional and municipal government stakeholders saw the opportunity to combine both visions: airport and agriculture, and recognized that a significant amount of land has already been transferred to Parks Canada and will be preserved in perpetuity. They wondered, as examples: could heat from the airport help warm hot houses? And would the airport's proximity facilitate international distribution of raw and/or processed agricultural products?

On business case / information gaps:

All regional and municipal government stakeholders interviewed agreed that any decision on development of the Pickering Lands requires a solid business case.

With a view to developing a future potential airport, some of the gaps identified include data on aviation demand and capacity as well as information about the revenue-generating potential of an airport on the Pickering Lands. One stakeholder mentioned the importance of having data on Buttonville's current use to understand the impact of its closure.

Many stakeholders mentioned the importance of considering not only aviation analysis but also the potential, other economic benefits generated by the airport employment lands, when building a business case. Some stakeholders argued that in order to achieve "social license" for an airport from the community, it would be important to demonstrate the economic benefits for the entire region.

With respect to the agriculture vision, some stakeholders indicated the need for data on the potential revenue generation and job creation of this scenario, in order to demonstrate that this is actually a viable alternative to other types of development.

On operating and funding:

In terms of governance for a future potential airport, stakeholders expressed divergent opinions. Some are of the view that it would be best to have one airport authority operating both Pearson and a new Pickering airport to ensure coordination and prevent competition. Some stakeholders even suggested that the over-arching authority should oversee all Greater Golden Horseshoe (GGH) airports to ensure regional coordination.

Others are of the view that it would not be appropriate for the GTAA to operate both airports because its mandate is to maximize Pearson's net revenues and that two distinct operators would ensure that Pickering airport's interests are well-represented, as well as the interests of the Eastern GTA.

Some regional and municipal government stakeholders proposed the establishment of an Airport Governance Steering Committee to examine this issue in all its complexity.

Some stakeholders expressed interest in acquiring employment lands and managing the recruitment of companies to occupy the lands. However, should these lands remain in federal ownership; they expressed interest in playing a role in their development.

In terms of funding models, many stakeholders indicated that a P3 model would be appropriate. Some added that maintaining a federal presence of some sort would protect public interests.

Others were adamant that "not one nickel" of public funds should be invested in an airport project and that federal government's role should be limited to regulation. It was suggested that Transport Canada put out a request for qualifications (RFQ) to identify a handful of qualified companies and a subsequent request for proposal (RFP) to select a company to undertake the airport project. These stakeholders further expressed the view that the Government of Canada and Transport Canada are no longer in the business of building airports and that the private sector is better positioned to plan, design and manage such projects.

On opportunities:

Regional and municipal proponents of a Pickering airport see nothing but opportunities ahead. These include the opportunity to leverage existing rail and road networks to make the airport easily accessible, as well potential new transit-ways, and maybe even an eventual connection between Pickering and Pearson airports. They see significant economic opportunities on the employment lands along highway 407, north (to Highway 7) and south (to Taunton/Steeles), including convincing Bombardier to relocate from Downsview to Pickering. These stakeholders see the airport project as creating thousands of quality jobs in the region and boast having a highly skilled local workforce, trained in local post-secondary institutions, able to fill these jobs as well as work close to home, improving quality of life in the region, reducing traffic and commuting time, and reducing the environmental footprint.

Some regional and municipal government stakeholders see an opportunity to build a “green” airport, using the latest technologies, materials and practices for a sustainable airport. According to them, efforts to reduce the environmental footprint of the airport would go a long way towards achieving social license for the project.

On risks:

Stakeholders who support the development of an airport cautioned that the GTA’s, Ontario’s and Canada’s economies would suffer if capacity issues at Pearson Airport compromised its status as a reliable global hub.

They also indicated that once residential development has occurred in Seaton, opposition to an airport is likely to increase, in light of noise concerns. They identified a risk with delaying a decision on an airport because of a very vocal, yet minority opposition, and missing out on moving ahead with an extraordinarily strategic project.

Other stakeholders perceived a risk in a potential Pickering Airport becoming a competitor to Pearson rather than a complement and mentioned the importance of coordination within a system of airports in the GTA.

Despite recognizing that an airport is an important economic driver for a community, some regional and municipal government stakeholders interviewed cautioned that an airport is not a panacea and expectations that an airport would do the same for Durham as Pearson has done for Mississauga may be unrealistic, due to the smaller size of the potential airport. Some other stakeholders mentioned that the job creation forecasts may be skewed because a new airport may imply moving existing jobs from one area of the GTA to another.

In comparing Mississauga with Pickering as a potential airport location, a senior leader from Mississauga expressed that while it may have certain advantages over Durham, such as its closer proximity to the U.S. border, a new airport at Pickering would definitely foster substantive commercial opportunities in the Eastern GTA.

On the role of government:

Despite the many visions and opinions expressed by regional and municipal stakeholders, there seems to be consensus on two facts: they want a decision to be made, and they desire continued engagement with the community.

Proponents of the airport see the federal government's role as a regulator and a coordinator, ensuring that the project is initiated in consultation with community stakeholders and that the process is transparent.

Some stakeholders indicated that municipal governments can play an important role in attracting the right kind of investors, businesses and jobs to the area, such as advanced manufacturing, aeronautics and technology-based companies. For example, the City of Pickering is currently conducting a sector analysis of the Pickering Innovation Corridor, which will provide recommendations on which sectors the region should focus on to create sustainable jobs.

Other stakeholders expressed that government's role is to focus on demonstrating social benefits that can come with an airport such as jobs and economic prosperity, to address the concerns of the community and to continue communicating and engaging with stakeholders. Many stressed that it was important the federal government continue to protect the Pickering Lands until a decision is made.

On interim development:

According to regional and municipal government stakeholders, interim development would be both impractical and inappropriate because of the timelines to design and build an airport. Development should be limited to activities that are compatible with a future airport. This would include ongoing commitment to agriculture.

CONSERVATION / AGRICULTURE STAKEHOLDERS:

SUMMARY OF CONSERVATION STAKEHOLDER POSITIONS

*Environmental groups * Agriculture Groups * Community stakeholders*

On a vision for the Pickering Lands:

- Would prefer the Pickering Lands remain as farmland and ensure natural resources are protected
- Some envision the Pickering Lands as an agricultural hub

On a business case, information gaps:

- A majority can accept an airport if demand warrants it and there are demonstrated social benefits but only if “done right”
- Want to explore all ways to facilitate co-existence of agriculture, environment, airport and new industry

On opportunities and challenges:

- Consider agriculture as economic development with the potential to create jobs in the region

On government’s role:

- Ensure that community stakeholders are involved throughout all phases of the process

On interim development:

- In the interim, provide farmers with longer leases and promote agricultural economic development

The conservation / agriculture stakeholders are composed of eight different groups that are active in Ontario as well as in the community around the Pickering Lands and are advocating for the preservation of agricultural lands and/or natural resources.

On a vision for the Pickering Lands:

Conservation stakeholders would prefer to see the Pickering Lands protected for agricultural and environmental purposes and ideally not used for an airport. However, the majority of stakeholders (all but one) accept that an airport may be required and are adamant it can happen with the implementation of sound agricultural and environmental practices.

Many stakeholders have a vision of a vibrant agricultural industry taking place on the Pickering Lands, attracting young farmers and focusing on market-driven crops and innovative practices.

Given that the lands are class 1 soil, they would like to see farmers diversify and move away from cash crops such as corn and soybean and invest in orchards, vineyards, vegetables, and provide local products to the GTA. This can only be achieved through the adoption of longer farmer leases.

Other stakeholders would like to see the airport footprint reduced so that remaining ecologically sensitive portions can be protected and transferred to Parks Canada, including the Duffins and Rouge water systems that form part of the Greenbelt.

One stakeholder indicated that, although there is some “resignation” or acceptance of the future need for a reliever airport, they would never support an airport dedicated solely to general aviation because this was not part of the rationale behind expropriation. They can accept an airport if demand warrants it and there are social benefits but would not support the development of airport for private purposes on prime agricultural lands.

One conservation stakeholder was unequivocal in its opposition to an airport and described a vision of developing the Pickering Lands into an agricultural hub for the GTA. It expressed disappointment at its inability to test its assumptions with data. When I volunteered to try and help in this regard, they urged me to try. As such, I organized conversations with key academics in this field.

One was a global expert in Energy and Transportation who shared a vision of a carbon-neutral airport, which could play a role in the Region’s efforts to offset its carbon footprint, as well as showcase innovation in biodiversity and agriculture. This expert boasted the proximity to Toronto’s zoo and to the Rouge National Urban Park as an opportunity to position the airport as a sustainable and environmentally friendly business, which could partner with the community in a network of win-win ways.

Secondly, I contacted several of Canada’s most respected agricultural policy leaders and posed this question: how could commercial agricultural development contribute to the region’s economic prosperity?

They stated that the agriculture industry is tough, and that factory farms have happened for a reason. It was said that most young Canadians simply don’t want to earn their living in agriculture anymore – but that farming on these lands could potentially be done by new Canadians who farmed in their country of origin, including growing products uncommon to Canada. They stated that agriculture could not nearly match an airport in terms of jobs created,

and that an airport on the Pickering Lands would most likely support Ontario more than agriculture would. Modern farming has evolved to bigger, more automated farms, specializing in soy and corn production as opposed to local food supply.

One expert allowed that an airport could potentially help agriculture in Durham Region by using recycled heat generated from the airport into large green houses, or creating an ideal location for processing/packing plants that could facilitate national or international transport.

On business case / information gaps:

Conservation stakeholders reiterated the view that any decision to develop a Pickering Airport must be based on demand that cannot be served by existing regional airports.

Other stakeholders identified information gaps related to the noise impacts, environmental impacts (especially on the Moraine) and air pollution impacts that would accompany an airport and related infrastructure development, and requested that this information be included in consultation processes with the community.

On opportunities:

Many stakeholders expressed the view that an airport is not the only way to create jobs in the region and suggested that agricultural projects and tourism in the Rouge National Urban Park could serve as economic drivers.

One stakeholder identified an opportunity to invest in rail transit as an alternative to an airport which could also benefit visitor transportation to the Urban Park.

Another stakeholder suggested there may be an opportunity to foster a green business community including a “green” airport, possibly in partnership with UOIT.

On challenges:

Some stakeholders suggested that it would be difficult to move ahead with an airport without the support of the community and efforts need to be made to obtain this “social license”.

On the role of government:

All conservation stakeholders agreed that continued engagement with the community is essential to determine future development on the Pickering Lands. One stakeholder suggested that engagement and consultations should be broadened to include other federal departments such as Agriculture, Environment and Parks Canada.

Many stakeholders mentioned that they understand that it is the federal government's role to ensure sufficient aviation capacity and that they can foresee a future need for a reliever airport. However, they expressed the hope that the Government would protect only the portion necessary to aviation and develop the remainder as farmland, parkland and promote local food production and all-around quality of life. As an example, there may be an opportunity to smooth out some of the jaggedness along one edge of the current boundary as well as to connect Lake Ontario to the North Durham aquifer.

One stakeholder suggested that the federal government's role must include working with the Province on land use planning, economic development, and employment lands. They summarized their view on government's role as "Act, decide, involve, be green".

Conservation stakeholders, like all stakeholders, want the federal government to announce its intentions, be transparent and work with interested parties.

On interim development:

A number of conservation stakeholders were in favor of using the Pickering Lands to leverage agriculture projects in the interim and suggested that farmers should be granted longer leases to justify investing in innovation and crop diversification.

Some stakeholders urged that without a decision, it was difficult to promote "interim development" and argued that businesspersons need to know whether or not an airport will be forthcoming before they can decide to establish on or near the Pickering Lands.

AVIATION STAKEHOLDERS:

SUMMARY OF AVIATION STAKEHOLDER POSITIONS

*Airlines * Airport Operators * General Aviation & Associations * Aviation Academics*

On a vision for the Pickering Lands:

- Stakeholders believe that the timing is right for a decision by the Federal Government
- Importance of considering the “system of airports” in the GTA and managing it strategically

On a business case / information gaps:

- Missing element: a vision for a Pickering Airport

On operating and financing:

- Support some form of coordination within GGH airports
- P3 would be an appropriate model

On opportunities and challenges:

- Have a Master Plan that incorporates aviation needs and leverages commercial opportunities surrounding the airport

On the role of government:

- Importance of transparent communications and community engagement to achieve social license

On interim development:

- Stakeholders envision a small general aviation airport with room for growth, driven by the market

1. Airlines

On a vision for the Pickering Lands:

Two Airlines were interviewed, both expressing that although it was wise to protect the Pickering Lands for future aviation needs, they did not foresee an immediate need for a Pickering Airport since Pearson has yet to reach capacity and other regional airports are underutilized.

On business case / information gaps:

Airline stakeholders expressed that it is clear Pearson will reach capacity at some point. They wondered if existing airports, perhaps expanded, could be at least part of the solution. They also stressed that any decision to build a new airport would need to be market-driven, not forcing passengers or staff to be or go where they don't want to.

On operating and funding:

On governance, airline stakeholders expressed that before decisions were made on an operator, the role of a potential Pickering Airport needed to be defined, with a view to ensuring coordination with Pearson which would remain the international hub for Canada.

In terms of funding, one stakeholder suggested that a P3 model could be appropriate but that it brings challenges linked to many large partnerships and projects. It was suggested that federal government could build the base infrastructure and let private enterprise do the rest.

On opportunities:

One stakeholder mentioned that an opportunity exists to have an airline drive the success of a new airport as Porter did with Billy Bishop Airport. For this scenario to occur, an airline would need to carve out a niche and have a detailed strategy for a Pickering Airport. Another opportunity is to have a plane manufacturer such as Bombardier move to Pickering Airport, thereby freeing up Downsview for amazing opportunity in the heart of Toronto as well as customizing a brilliant, new capital vision for Bombardier.

Airline stakeholders also noted that corporate jets and general aviation need a home and that if they had an alternative to Pearson, this could yield a win/win for all.

One stakeholder mentioned that new technologies such as C-series planes should abate noise concerns from nearby residents.

On challenges:

One stakeholder indicated that splitting airline operations between airports is expensive and unpopular as well as representing a challenge for border crossing agencies that are already short-staffed.

Another stakeholder indicated that timing is key and there is a risk of building the airport too early, which would be expensive and would not provide the desired return on investment. Conversely, building it too late presents another set of challenges.

On the role of government:

Protect the lands for future aviation needs and continue to take the necessary steps to assess and optimize the current system of airports with a view to determining when a new airport will be required.

2. Airport operators

I had the opportunity to interview a broad range of airport operators including Oshawa Municipal Airport, Buttonville Airport, Markham Airport, Waterloo Airport, Ports Toronto (for Billy Bishop) and the Greater Toronto Airport Authority (for Pearson).

On a vision for the Pickering Lands:

A majority of airport operators looked favorably on the development of an airport on the Pickering Lands as long as it is market-driven and can serve a niche market strategically within the network of airports in the GTA.

Most stakeholders envisioned starting with a small airport that could first focus on general aviation and take over Buttonville's current market, and continue to grow to include cargo and passenger flights, as driven by the market.

One operator noted that there will eventually be a capacity shortfall at Pearson and advocated to adopt a vision of a "system of airports" in the GGH. They noted that Pearson is the hub for Canada but that it needs to be connected to the other airports. The operator noted that an airport at Pickering could provide convenient passenger service for the growing population in the East of the GTA, as well as take on the business currently at Buttonville. This operator envisioned that uses at Pickering could include cargo and regional/national passenger service. He stressed that passenger convenience is always a driving factor.

Another airport operator stressed the importance of having a vision for a Pickering Airport which enhances the strategic success of the GTA. The operator explained that an area of specialization needed to be identified and that coordination with other regional airports was essential, i.e. Pearson is the hub, Billy Bishop Toronto City Airport is the urban airport, Hamilton is specialized in charters and freight. There needs to be a strategic niche for Pickering Airport to thrive. Some suggested that Pickering's niche could be as a reliever airport to Pearson, allowing Pearson to focus on international traffic and moving some domestic flights to Pickering.

One operator of a smaller airport suggested that there is no need for a new airport and that his could be expanded to accommodate Pearson's shortfall.

On business case / information gaps:

A number of operators indicated that the most important gap is a decision by the federal government. Many stressed that the key element missing is a vision and a Master Plan, outlining the strategic role for a potential Pickering Airport and surrounding commercial lands.

Some stakeholders noted that there has been a lot of technical analysis on capacity and demand, although an update is needed, but there has not been enough analysis of social and economic benefits of a new airport.

On operating and funding:

Several stakeholders showed interest in operating a potential Pickering airport, boasting their experience, customer base and familiarity with the market. Of these, some felt the interests of the Eastern GTA would be best represented if the GTAA were not the operator. Some noted that the operator should be decided only once the role of Pickering Airport has been determined and that it should function collaboratively with the other GGH airports, whether under one over-arching authority or not.

One operator also mentioned the need for business acumen to seize other commercial opportunities linked to an airport.

In terms of funding, the general consensus was that a P3 would be appropriate and that it could be modeled on examples such as the Toronto Pan Am Games and recent 400 series highways. It was noted that while debt may always be an airport's largest cost item, it can be managed in an entirely strategic way.

One stakeholder highlighted that the federal government is no longer in the airports business and that the region and municipality would need to play a large role, along with the private sector.

On opportunities:

Many stakeholders indicated that Pickering's location, greenfield status and potential connectivity represents a unique opportunity to build and expand a quality airport, highly accessible for passengers, products and employees.

One stakeholder mentioned an opportunity to have rail connect Pickering and Pearson to ensure people and cargo can travel from one airport to the other and otherwise connect North Toronto, as well as rail to connect Pickering to Union Station.

Regarding the opportunity of having one airline drive the success of the airport, it was noted that if a major carrier is permitted major influence over an airport's decisions, it must earn that privilege through "the power of its purse".

In terms of commercial activity surrounding the airport, it was mentioned that fulfillment service centers have become huge business such as Amazon, cargo centers, repair centers, and parts centers and could potentially operate from Pickering Airport.

On challenges:

A seasoned operator highlighted the need to understand that return on investment will not be immediate and that building the airport would require important capital outlays. He suggested that long term leases would be appropriate, such as 60 years with option to renew for 20 years, as shorter leases would represent a challenge for borrowing money.

A number of operators indicated that, although a new airport could start small with General Aviation and cargo, but passenger service is essential to making money. They also mentioned that airlines will resist splitting operations between airports which the planners must take into account.

One operator mentioned the challenge of achieving social license for an airport and that it requires constant effort. Operators, therefore, must foster good communication, transparency and inclusiveness through outreach, education and community investment.

On the role of government:

First and foremost, the federal government must act, i.e. make a decision. If this includes a potential airport, it must then ensure that the appropriate infrastructure (e.g. roads, other transit, and other services) are planned and executed in a timely manner to support the airport and related enterprise.

Stakeholders also suggested that the federal government should determine the governance model for the airport and, if necessary, ensure that the airport has the capacity to borrow. It was also acknowledged that the federal government should remain involved in a regulatory capacity which could include fostering a system of GGH airports.

On interim development:

Operators cautioned against interim development and stressed that any activities on the Pickering Lands should not only be compatible with a future airport but also the types of businesses that could best leverage an airport. They expressed that master planning is important and that municipal governments be very involved as they have more direct influence on land use planning.

3. General aviation stakeholders

The stakeholders interviewed in this section included associations made up of airlines, pilots and other general aviation stakeholders.

On a vision for the Pickering Lands:

General aviation stakeholders would like to see Pickering replace Buttonville airport as a starting point and expand over time, as demand increases. They also see a Pickering airport as a home for other business aviation clients that are “being pushed out of major airports”. These include business jets, flying schools and recreational users. The long-term vision from these stakeholders is a multi-sector airport, offering services for business aviation, cargo, passenger and charter.

Some stated that a new airport should compete with Pearson rather than collaborate.

On business case / information gaps:

The missing ingredient is a decision. It was suggested that no additional data is required to get started with a general aviation airport since Buttonville exists, is closing and its clients must find a new home.

On operating and funding:

General aviation stakeholders are of the view that a new airport should be independently run, not overseen by the GTAA and that a P3 would be an appropriate funding model.

It was suggested that long-term leases would be appropriate to allow time to generate return on investment, between 60 to 99 years.

On opportunities:

Some stakeholders identified an opportunity for a Pickering airport to specialize in charter flights and offer a more advantageous cost-structure than larger commercial airports.

It was noted that there is an opportunity to make a Pickering airport highly accessible through existing road infrastructure and improving rail infrastructure.

One stakeholder identified the opportunity of starting a new airport from a “clean slate” and the possibility of involving the community in its development by including services such as flight schools to help achieve buy-in.

On the role of government:

General aviation stakeholders see a role for the federal government in setting up an Airport Advisory Council, to hear from stakeholders as well as ensure transparency and inclusiveness throughout.

On interim development:

In the views of general aviation stakeholders, interim development could jeopardize use of lands as an airport or limit a future operator’s options. Their vision of interim development is a general aviation airport to replace Buttonville.

4. Aviation Sector Experts

I interviewed two world-recognized aviation-sector experts, one Canadian and the other, American.

Vision for Pickering Lands:

The aviation experts did not express a vision for a Pickering airport *per se* but suggested that the federal government should determine if the need exists.

Definitive need can sometimes be difficult to prove but a greater risk can be not to build, especially in a region that has all the hallmarks of major, long-term growth such as Toronto (e.g. stable government, diverse population that gets along, good climate, no earthquakes or volcanoes, plenty of water and food, rule of law, convivial neighbours, excellent education and health care).

As soon as the federal government affirms the market need, the expert recommended that it should announce it intends to build a reliever airport at Pickering. The announcement, while clear, would not have to be specific with respect to timing, size and role of the airport as world-class leaders will jump in with their experience and resources, and offer to partner in win/win ways.

The experts were adamant that Pearson's overflow could not and must not be allocated to multiple, small airports in the GGH but rather, to one significant reliever airport. After describing why none of the existing airports could adequately handle the load, they went on to describe Pickering as "a terrific site, one that many regions throughout the world would envy (e.g. Minneapolis/St. Paul), noting it's on the right side of 'Metro', has a natural catchment population, and can be buffered by the vastness of the airport lands as well as by surrounding agriculture and the Rouge National Urban Park".

On one point, the experts were particularly adamant: the federal government should never give up any of the land.

On business case / information gaps:

The aviation experts expressed that aviation demand forecasting is speculative as many factors are in play and subject to change. The clear, irreversible, worldwide market trend, however, is for more passengers and a reliever airport can be thought of as an insurance policy in the event of a capacity shortfall, which is likely.

On operating and funding / role of government

The experts were of the view that P3 funding would likely play a key role in the airport's development, either in full or in part. Also, the parties should understand that return on investment would occur in the medium/long term, not in the short term. They also praised the Canadian model for managing airports where the Government regulates and ensures that airports are run in the public interest while entrusting their management to independent authorities with commercial objectives.

Of the two self-evident means of operating a new airport , i.e. having the new airport under the management of the GTAA or having an independent airport authority, the experts acknowledged the benefits of both. Regardless, there will be the need to coordinate air traffic across the entire area. It was noted there are some brilliant vice-presidents in existing airport authorities who are ready to step up as CEO of a new one.

On opportunities:

It was noted that there exists an opportunity to build a "green" airport even though none exists today in the opinion of the aviation experts, despite certain claims. As well, efforts could be made to create a win-win scenario for an airport and agriculture whereby land is leased to farmers for say, 10-20 years, with certain conditions such as the kind of agriculture that can and

cannot be practiced there. In addition, attempts to capitalize on heat exchange and fast track transportation may also work to the advantage of all parties.

Finally, they addressed the issue of infrastructure and ground transportation, including the importance of the “last mile”. The Havelock rail line was described as fortuitous and could be a terrific asset. It will not be necessary to connect Pearson and Pickering with expensive options such as high-speed rail for many years, if ever; meanwhile, buses along Highway 407 will suffice as would Havelock rail-Union Station-UP-Pearson connectivity. As well, one can never underestimate the need for adequate and appropriate parking.

FIRST NATION STAKEHOLDERS:

*Huron Wendat * Six Nations of the Grand River*

Summary of First Nations stakeholder positions

- Are not opposed to development on the Pickering lands
- Would like to be involved and consulted in the process of development on the Pickering Lands
- Want to ensure protection of archeological sites on the Pickering Lands as well as wildlife

While it is my understanding the Transport Canada is engaging on the Pickering Lands Site with Alderville First Nation, Chippewas of Georgina Island First Nation, Curve Lake First Nation, Beausoleil First Nation, Chippewas of Rama First Nation, Hiawatha First Nation, Mississaugas of Scugog Island First Nation, Huron-Wendat, Mississaugas of the New Credit First Nation and Six Nations of the Grand River, I was only able to meet with two of these groups. I interviewed members of the Huron Wendat First Nation and the Six Nations of the Grand River First Nation. The feedback received from these stakeholders is summarized below.

On archeological resources:

First Nations stakeholders indicated that there are archeological sites on the Pickering Lands and that additional sites will likely be discovered as development occurs. Some archeological sites contain ossuaries or burial grounds that are especially important to the First Nations. The First Nations groups wish to be consulted and involved in the process as development occurs to ensure that these sites are protected.

On environmental issues:

First Nations groups would like to see efforts made to compensate for the transformation of green space into an airport and suggested that tree replacement or carbon offsets could be good examples. Also, they would like to see ongoing monitoring of the wildlife on the lands.

On opportunities:

The Huron Wendat First Nation, in particular, stressed that they are experienced business persons and plan to tender for opportunities throughout the process.

PERSPECTIVE OF THE INDEPENDENT ADVISOR:

I will reinforce here, a narrative introduced in my Covering Letter to the Minister, that there are two over-arching perspectives on the Pickering airport and employment lands, which appear to compete with each other.

There is the anti-Airport contingent who, besides disliking the notion of living near an airport in general, have dedicated their lives to the preservation and advancement of conservation and/or agriculture. They point out, rightly, that 8688 acres of prime agriculture land is a lot of land, as is eating local and fresh food. As well, they envision thousands of good, permanent jobs emanating from their vision of a vibrant agriculture industry located there. Many readers may disbelieve this, pointing out that factory farms have already supplanted many family farms – and that regardless, farm owners are forced to bring in foreign and temporary farm workers because Canadians do not want to do that work. Those same observers may note that this interest group has had 40 years to produce evidence-based research to prove its point but has not done so. I am sympathetic to the pro-agriculture interest group, however, noting they are farmers and advocates, not researchers and academics. In any event, I called upon several contacts, some old and some new, to shed evidential light on this subject. Their findings suggest that indeed, good jobs would ensue from an agri-economic vision but probably in the hundreds, not thousands and certainly not tens of thousands.

Almost all of the pro-agriculture/conservation groups – and maybe even, all - recognize that this whole conversation would not even be taking place if not for the exceptional growth of the GTA and its disproportionate role in Canada, which, on the one hand, is an extraordinarily successful place to live and create enterprise. As such, it carries disproportionate weight for Canada, well beyond its borders. On the other hand, it is a megalopolis, with typical issues including congestion, smog, voracious growth and the compulsive need to compete worldwide, all of which are concerns to the agricultural/conservation groups.

The pro-Airport contingent speaks for more groups but possibly (probably) for fewer citizens. Their primary motivation can be summed up in one, 4-letter word: jobs. They are transfixed by the prospect of these tens of thousands of apparent, good jobs.

For them, the thought that their kids and grandkids would be able to live nearby instead of (far) away is profound, as is the prospect of their fellow citizens avoiding the family-haunting, environment-bruising commute for hours per day. The prospect of abundant, new, commercial profits and tax revenues has probably also not gone unnoticed.

Their world vision accepts that globalization is here to stay (and probably will increase), thereby accelerating the need for convenient, affordable and safe travel. They believe Pearson cannot accommodate the growth and that sprinkling the shortfall among multiple small airports would be rejected by customers as inconvenient, thereby ruining the GGH's claim and reality of being a world-leading region. In particular, they feel the time has come for Durham Region (and York Region, too) to stand shoulder-to-shoulder with Metro West and the Regions of Peel and Waterloo, as well as Toronto.

So, yes, they see the Airport as the once-in-a-lifetime "silver bullet" which will transform the commerce and lives of almost all citizens for the overwhelming good, and urge Transport Canada to act with courage and clarity in what they perceive as the clear, best interests of the people in general.

As to the loss to agriculture of the 8688 acres, they don't dismiss that but point out: a) pro-agriculture/conservation groups can already claim huge victories such as the Greenbelt (including Oak Ridges Moraine and the North Durham Agriculture Preserve) as well as the expanded Rouge Urban National Park (15-22 times the size of NYC's Central Park); and b) those acres, while significant, are a tiny percentage of the acres of still-available, excellent farmland in York and Durham Regions (and an even tinier percentage if one includes the land directly westward, eastward and northward, as well). As one datum, the 8688 acres is 1.69% of the Greenbelt alone.

Some pro-airport advocates have also pointed out that while the proposed airport's footprint is double Pearson's, the airport is predicted to "only" serve half the number of passengers at most, and not for many years to come. Might that allow, therefore, for an enhanced green buffer area that would be extensive and important for conservation and agricultural priorities, even if they remain in the ownership of Transport Canada?

Before proceeding to the Recommendations, I leave this section with 2 more points:

First, this Report is not the final word on this subject, as a contract has already been awarded for an aviation sector analysis which will yield the best data possible on every aspect pertinent to the eventual decision, including types and sizes of airports to be considered, market-driven need, infrastructure ramifications, comprehensive financials, governance options, capitalization options, and more. As well, the GTAA has launched a collaborative analysis of airports in Southern Ontario; and

Second, I will risk a point here I hope no one will take the wrong way. The point is: individuals matter and Transport Canada is now led by an astronaut (with 3 space walks!) - in fact, a national hero, with a reputation for speaking forthrightly, a PhD in Engineering, a Degree in Engineering Physics, and is a flier. No sycophancy is intended here, nor undue pressure on Minister Garneau. Who better, however, to deal with this file in a way infused by personal experience, knowledge and objectivity, and whose ultimate decision Canadians would rally around in good faith?

RECOMMENDATIONS

This section aims to address existing strategic gaps identified by stakeholders, addresses their expectations for future engagement, attempts to reconcile the two potentially opposing visions, and initiates a road map leading to a decision.

Recommendation 1:

Undertake the analysis required to make a decision on the need for an airport including timing, type, size, location, capitalization, infrastructure, governance, and other pertinent factors.

A reoccurring theme expressed by the interviewed stakeholders was the need for the federal government to make a decision on the development of the Pickering Lands. There has been uncertainty on this subject for over 40 years and community stakeholders are eager for a resolution. In order to be in a position to make a decision, the federal government has a responsibility to perform the necessary due diligence and determine whether there is a business case for building an airport on the Pickering Lands. I therefore recommend undertaking the required analysis and communicating the results in the most efficient way possible.

Recommendation 2:

Continue engaging with stakeholders in the community throughout the process of making a decision on an airport and subsequent stages.

A common theme mentioned by stakeholders during the consultations was the importance for Government to be transparent and inclusive throughout and after the decision-making process. It is my recommendation that Transport Canada continue to reach out to stakeholders and engage with the community, including while the aviation sector analysis is being conducted.

For example, Transport Canada could carry out engagement activities in the community to disseminate the present report and communicate the findings of the consultation process, to foster continued dialogue on the issues at stake.

Continued engagement would go a long way to building trust and goodwill in the community for the process being led by Transport Canada.

Recommendation 3:

Avoid interim development that could jeopardize aviation options, until after a decision is made on a potential airport, and continue to foster success of agricultural activities in collaboration with the farm community.

In light of feedback received from a majority of stakeholders, it is my recommendation that the federal government not invest in new modes of interim development on the Pickering Lands until a decision has been made on the airport.

A number of stakeholders indicated that, according to current predictions related to the need for an airport, the timeframe for interim development is too short, not only to attract businesses but most importantly, to ensure that aviation options are protected.

The only form of interim development acceptable to a significant number of stakeholders is the continuation of current farming operations, including its possible enhancement, which I feel may be possible in at least some of the ways described herein, regardless of the outcome of the imminent needs/capacity study.

Recommendation 4:

Establish a Pickering Lands Advisory Network, consisting of a diverse representation of stakeholders for two broad purposes: a) to liaise with and advise Transport Canada on matters such as are referenced in this report (e.g. governance, financing, commercial activity on and around the airport, infrastructure, connectivity to Union Station and Pearson Airport – all potentially becoming major sections of a Master Plan); and b) to enable Transport Canada to share information throughout all phases of development on the Pickering Lands.

Many stakeholders interviewed saw a role for the federal government in developing a Master Plan for the Pickering Airport. This would consist of determining the strategic role for a Pickering Airport within the system of GGH airports and formulating a plan that would include elements such as those listed, above. Transport Canada cannot develop as good a Master Plan in isolation as it can through collaboration. Hence, this recommendation.

I would recommend that Transport Canada appoint a Chair for the Advisory Network, who would reach out to a broad array of stakeholders and work with them to determine the themes to be discussed and the communications mechanisms (including meetings and e-possibilities).

After some time, there may be a need to form different groups to tackle different issues, based on the area of expertise and the interest of the network participants. One never knows, however, how groups can rise to occasions, especially when they are intuitively gracious, well-led, and believe passionately in an important cause. As an example, I had the privilege of leading the advocacy and implementation for another large, strategic project in Durham Region - UOIT – and I found that the greater the circumference of our round table, the more we could achieve, together.

CONCLUSION

I hope the information and insights herein contribute to an understanding of the issues and options. There is, from a certain vantage, a rare and glorious opportunity: tens of thousands of potential, good jobs associated with an airport and its economic outflow.

On the other hand, there is the agricultural counter-vantage, which has “rooted” for decades.

As noted earlier, both sets of advocates are people of exemplary integrity, intelligence and goodwill. They love and believe in Canada as they do in their local community. I believe, therefore, that if the next study reveals conclusively that Canada will require a reliever airport in the GGH and that Pickering is objectively the only location, that the parties can and likely would begin immediately to work together to ensure maximum advantage for all perspectives and priorities.

For this collaboration and goodwill to happen, I have attempted to frame this Report, including its recommendations, to foster that kind of process towards that kind of end.

I am grateful for the opportunity to serve in this capacity and wish all parties well in the future-going debate.

APPENDICES

A. LIST OF PARTICIPANTS:

1) BUSINESS STAKEHOLDERS:

Banks and other financiers

- Bank of Montreal – VP Personal Banking Durham, VP Commercial Banking Eastern Ontario
- InstarACF Asset Management Inc. – President & CEO
- OP Trust – President & CEO
- Meridiam Infrastructure – Executive Director & Partner
- Caisse de dépôt et placement du Québec – Director Infrastructure Investments
- Manulife Financial Corporation – Managing Director Project Finance & Infrastructure

Real estate developers

- AECOM – Executive VP, Canada
- John Laing – VP
- Acciona Canada – Executive
- Aecon – Senior VP, Strategic Business Development
- Dragados – Senior VP, Business Development
- ACS Infrastructure Canada – Project Manager

Transportation companies

- Canadian Pacific Railway – Business Development Manager
- Safran Messier-Bugatti-Dowty – President & VP Finance
- Metrolinx – President & CEO, Chief Planning Officer
- VIA Rail – President & CEO, Senior Advisor to the President & CEO, Director Government & Community Relations

Business associations and chambers of commerce

- Ajax-Pickering Board of Trade – Government Relations Committee
- Durham Region Labour Council – appointed delegate
- Greater Oshawa Chamber of Commerce – CEO
- Whitby Chamber of Commerce – CEO
- Canadian Council for Public-Private Partnerships – President & CEO, Director Strategic Planning & Partnerships, Membership Development

2) GOVERNMENT STAKEHOLDERS

Federal

- MP for Durham
- MP for Markham-Stouffville
- MP for Pickering-Uxbridge
- MP for Whitby
- MP for Ajax

Provincial

- Former Liberal MPP
- Province of Ontario
 - Ministry of Economic Development, Employment & Infrastructure;
 - Ministry of Transportation;
 - Ministry of Tourism, Culture & Sport;
 - Ministry of Municipal Affairs & Housing

Regional /Municipal

- Regional Municipality of Durham – Regional Chair

- City of Markham – Senior City Staff (Policy & Planning, Economic Development, Engineering)
- City of Markham – Mayor
- City of Markham – Deputy Mayor
- Region of Waterloo – Commissioner Planning, Development & Legislative Services
- City of Pickering – Mayor, CAO
- City of Oshawa – Senior Staff, Economic Development Services
- Town of Ajax – Mayor, Government Relations Advisor, Policy Planning Coordinator
- Region of York – Chairman & CEO, CAO, Chief of Staff to Chairman & CEO
- Town of Whitby – Mayor, Executive Advisor to Mayor
- City of Toronto – Councillor, Scarborough
- City of Mississauga – Former Mayor

3) CONSERVATION/AGRICULTURE STAKEHOLDERS

- Friends of the Rouge Watershed – President, GM, Project Coordinator
- Land Over Landings – Chair, Vice-Chair, Research Chair, Treasurer, Farmer
- Oak Ridges Moraine Land Trust – Executive Director, Past Chair
- Green Durham Association – President, VP
- Friends of the Greenbelt Association – CEO, Program Director
- Knox Innovations – Director
- Vineland Research Group – CEO
- Canadian Food Inspection Agency – President
- Ontario Greenbelt Alliance – submission only

4) AVIATION STAKEHOLDERS

Airlines

- Air Canada – Senior VP Regional Markets, Director of Government Relations
- Porter Airlines – President & CEO

Airport operators

- Toronto Airways Inc. – President, VP
- Metropolitan Washington Airport Authority – CEO
- Waterloo Regional Airport – Airport Manager
- Markham Airport – Owner/Operator
- Oshawa Executive Airport – Airport Manager
- PortsToronto – CEO, Executive VP
- Greater Toronto Airports Authority – President & CEO, Director Public Affairs & Stakeholder Relations, Director Airport Planning
- Hamilton International Airport – President & CEO, VP Finance & Corporate Services, Director Marketing & Communications
- Former GTAA President

General aviation stakeholders & Associations

- Pickering Airpark LP – President, VP, et al.
- Durham Gateway Partners, Inc. – President, CEO
- Air Transport Association of Canada – Senior VP & CEO
- Canadian Owners & Pilots Association – President, Southern Ontario Director
- Canadian Business Aviation Association – President & CEO
- Airline Pilots Association – submission only

- Canadian Airports Council – submission only

5) FIRST NATIONS

- Huron-Wendat First Nation – Project Coordinator Ontario, Legal Counsel, Director
- Six Nations of the Grand River First Nation – Director Lands & Resources, Consultation Supervisor, Wildlife Manager, Land Use Officer, Secretary, Land Rights Consultation

6) ACADEMICS

- Trent University Durham – Head
- University of Ontario Institute of Technology – President
- Durham College – President
- Richard de Neufville – MIT
- Dr. Robert Gordon – Wilfred Laurier University
- Dr. Dan Hoornweg – University of Ontario Institute of Technology

B. SUMMARY STATEMENT OF WORK - INDEPENDENT ADVISOR ON THE DEVELOPMENT OF THE PICKERING LANDS

Overview

The Independent Advisor on the Development of the Pickering Lands (Advisor) will meet individually and in small groups with private and public stakeholders to seek feedback on their desired involvement in the economic development of the Pickering Lands, including a future potential airport. These stakeholders will include private sector developers, aviation sector operators, community organizations and municipal/regional/provincial governments. The Advisor will prepare a mid-term and a final report that will summarize key discussion input and offer views on how to move forward with the economic development of the Pickering Lands. The Advisor will also be supported through the consultation process by Transport Canada officials, as required.

Objectives and Scope of the Consultations

The Advisor's objective is to gauge the level of private and public sector interest and/or desired involvement in economic development of the Pickering Lands, including a future potential airport. This will involve consulting on certain points that include, but are not limited to, the following:

- the regional community's interest in developing an airport on the Pickering Lands;
- private sector interest in developing an airport, aviation cluster or other economic development on the Pickering Lands;
- when and what type of airport to develop;
- how it should be developed and operated;
- what type of economic development opportunities could be attracted to the Pickering Lands that would be compatible with a future potential airport;
- what type of investors would be interested in developing the Pickering Lands;
- what type of support, financial or otherwise, would developer/operators expect from the Government of Canada;
- what role the private sector envisions in the development of the Pickering Lands;

- what are the key aviation sector issues identified by stakeholders;
- what position, questions and concerns do community organizations have in relation to a proposed development;
- what types of funding models do the private sector envision in developing the Pickering Lands;
- what information gaps does the private sector believe need to be filled in order to advance airport development work; and
- what information and action does the private sector require from government to facilitate development?

Proposed Stakeholder Groups

The Advisor is expected to meet with representatives from the following stakeholder groups:

- financiers and developers;
- aviation industry;
- environmental and agricultural community groups;
- government stakeholders; and
- other business stakeholders.

Parties can be added at the discretion of the Advisor to ensure a full and comprehensive consultation process with relevant stakeholders.

Support from Transport Canada

The Advisor will be hired by Transport Canada. Transport Canada's support role will be limited to providing the Advisor with background, scheduling, logistical and technical assistance.

Milestones and Deliverables

The Advisor will prepare a mid-term status report that describes the approach taken by the Advisor to engage the targeted stakeholders and the progress made on assessing stakeholder interests and concerns. This report is expected to be completed by early 2016.

The final detailed report will summarize the key input received. It will describe the outstanding issues for the development of a future potential airport and assess the differences between stakeholder opinions. The Advisor will provide possible approaches to address these outstanding issues and note any other observations or views the Advisor deems necessary based on the outcome of the facilitation process. This report is expected to be completed by mid-2016.

C. PICKERING LANDS FACT SHEET

- The Pickering Lands are located 56 kilometers northeast of downtown Toronto, in Pickering, Markham and Uxbridge. The Government of Canada purchased 18,600 acres of land in 1972, for a future airport. Transport Canada is responsible for the day-to-day management of and long-term planning for the federally-owned Pickering Lands.
- Transport Canada released a Needs Assessment Study in 2011 that forecasted that the region would need an additional airport between 2027 and 2037, when experts predict existing airports in the Golden Horseshoe area will reach capacity.
- On June 11, 2013, the Government of Canada announced a responsible and balanced approach for developing the Pickering Lands. This approach sets aside land for a potential future airport and the creation of Rouge National Urban Park.
- On April 1, 2015, Transport Canada formally transferred 4,722 acres (19.1km²) of the western portion of the Pickering Lands to Parks Canada towards creating Rouge National Urban Park.
- On July 11, 2015, the Prime Minister announced that Transport Canada will transfer an additional 5,200 acres in the northeast sector of the Pickering Lands to Parks Canada for Rouge National Urban Park.
- Transport Canada is retaining approximately 9,600 acres in the southeast sector of the Pickering Lands for economic development, including a potential future airport, and is amending regulations to ensure that any new development around the smaller airport site will not create a hazard to aviation.
- Transport Canada is following a formal regulatory process to update the Pickering Airport site designation and the Pickering Airport Site Zoning Regulations to reflect a smaller airport site.

D. KEY AREAS FOR DISCUSSION

AIRPORT DEVELOPMENT

1. Do you feel that an airport should be developed on the Pickering Lands?
2. When and what type of airport do you believe should be developed? For example, a large, commercial airport or a smaller regional airport?
3. What information and action do you feel would be required from the federal government to facilitate the development of an airport on the Pickering Lands?
4. What would you identify as the key elements that must be addressed in any business case for a future airport?
5. What are your expectations regarding consultations with stakeholders during the planning and development processes?
6. What, in your view, are the environmental considerations related to the development of an airport on the Pickering Lands?
7. What role do you think the private sector should play in developing and operating the Pickering Airport?
8. Do you think a public/private partnership (P3) – where the private sector partner assumes additional risk for a reasonable return (i.e. financing or operations) – is a reasonable model for the development of an airport on the Pickering Lands?
 - a. Why?
 - b. Why not?

INTERIM ECONOMIC DEVELOPMENT

1. What are your thoughts on the idea of pursuing interim economic development of the Pickering Lands pending a decision on airport development?
2. What information or action do you feel is required from the federal government to facilitate the interim economic development of the Pickering Lands?
3. What roles should the federal government, the private sector and community groups play in the economic development of the Pickering Lands?

4. What do you believe could be the financial and social benefits of interim economic development of the Pickering Lands?