



To: Metrolinx Board of Directors
From: Leslie Woo, *Vice President, Policy, Planning and Innovation*
Date: February 14, 2013
Re: The Big Move Update – Recommended Changes

Executive Summary

This report provides recommended changes to The Big Move – the Regional Transportation Plan for the Greater Toronto and Hamilton Area (GTHA) – and details of consultation on The Big Move Update, including a summary of input received from the public, municipalities and stakeholders.

The update is intended to incorporate the findings of recent analyses that have been conducted in the four years since The Big Move was adopted in 2008, and to integrate the *GO2020 Plan*. It is not intended to change any of the foundational elements of the plan.

Recommendations:

That the Board of Directors approve the following:

RESOLVED:

THAT the recommended changes proposed in the staff report dated December 5th 2012 entitled “The Big Move Update” are approved; and

THAT staff proceed to update The Big Move document with the approved changes and also develop an easy-to-read and concise document for general public outreach and education.

Background

On December 5, 2012, the Metrolinx Board of Directors requested that staff proceed with consultation on The Big Move Update. The Big Move Update is intended to update Metrolinx’s long-range regional transportation plan by incorporating the findings of recent studies, including the recommendations of GO 2020 plan, the GO Electrification Study, project benefits case analyses and other technical studies since 2008. The purpose is to keep *The Big Move* up-to-date and relevant. The integrity of *The Big Move*’s foundation will remain – its vision, goals, objectives, projects, policies or priority actions, intact.

The Big Move Update is not the full legislated review of the regional transportation plan. That review, required through the Metrolinx Act by 2016, will be a complete review of The Big Move with a broader stakeholder and public consultation process, and would look to review the vision, goals and objectives of the plan as well as its priorities. Initial stakeholder consultation for that process is planned to begin in 2014.

Consultation

Over the last year Metrolinx staff have been consulting on the development of an updated version of The Big Move, as part of a technical review and progress evaluation of The Big Move. Three external stakeholder working groups have been part of this ongoing consultation; these groups have met on a quarterly basis since they were established:

1. A Project Committee, which consists of a multi-stakeholder multi-disciplinary group of community leaders from across the GTHA, representing a variety of organizations ranging from Civic Action to the Residential and Civil Construction Alliance of Ontario. This committee has met on six occasions since it was established in 2011. Meetings specifically addressing The Big Move Update were held on October 31st 2012 and January 14th 2013.
2. An external Municipal Working Group with municipal officials expert in land use and transportation planning. This group has met on six occasions since it was established in 2011; and
3. An external Transit Agency Working Group, consisting of senior representatives of GTHA municipal transit agencies. This group has met on five occasions since it was established in 2012.

The Municipal and Transit Agency Working Groups met together as a combined group on The Big Move Update on November 29th 2012 and January 18th 2013.

At these meetings, the stakeholder groups were provided with an overview of the proposed changes, and an opportunity to seek clarification and identify issues or concerns.

Public and broader stakeholder consultation on The Big Move Update occurred from early December 2012 to early February 2013. Consultation included online public consultation through the Metrolinx website, in addition to the meetings outlined above with municipal, transit agency, and other key stakeholders. Notification of the proposed changes and the consultation was provided to municipal governments, the federal government, and First Nations. No comments have been received from either the federal government or First Nations as of February 1, 2013.

Public Submissions

The www.bigmove.ca webpage containing information on the Update, received 2,017 visitors between December 1, 2012 and February 1, 2013 and the Update was downloaded 401 times. Metrolinx staff received 78 submissions through the Update online consultation page on bigmove.ca.

Fifty-nine (59) of the 78 public submissions were general inquiries or comments on funding and the investment strategy, such as the need for improved transit service across the region, support for better transportation connections to outlying communities and municipalities adjacent to the GTHA, support and opinions on new revenue tools to fund transportation initiatives, and questions on the status of specific projects.

There is currently a parallel and ongoing public discussion about The Big Move and Investment Strategy that will be summarized and reported to the Board before June 2013.

Nineteen (19) of the public submissions through the Update webpage specifically addressed elements of The Big Move Update including individual comments as follows:

- a desire for a longer consultation period;

- support for the Downtown Relief Line as a priority project;
- both support and opposition to electrifying rail lines;
- the importance of GO Transit expansion to Uxbridge and support to see this expansion reflected in Metrolinx's plans; and
- support for GO Transit expansion to Bowmanville, but a preference to keep the alignment south of Highway 401 to avoid disrupting residential areas.
- Metrolinx also received a submission from Durham Learning and Business Innovation Park, requesting that the future Thornton's Corners GO station be re-designated as a mobility hub. This will require additional analysis that is in the scope of the full legislated review in 2016, and will be considered through that process.

Municipal Submissions

In addition, Metrolinx staff received nine (9) submissions from municipal officials. Submissions received from municipal officials included a diverse range of comments and suggestions. Staff have responded to this input, and the submissions and responses are detailed in Appendix A.

Common themes that emerged from municipal submissions were:

- requests that Metrolinx reconsider moving GO rail two-way all-day service on sections of corridors from the 15-year to the 25-year plan, particularly for the Milton line between Meadowvale and Milton; and
- identification of new regional rapid transit projects, transportation corridors, mobility hubs, and corridors for expansion of GO service not currently in The Big Move.

Milton Submission

Eleven of the public submissions were received expressing concern that GO rail two-way all-day service between Meadowvale and Milton was being moved from the 15-year timeframe to the 25-year timeframe.

Two-way, all-day service involves the introduction of rail service in off-peak periods, such as mid-day service, evening service and weekend service. It also includes service that carries passengers in both directions throughout the day. Currently, GO Transit provides this service on the Lakeshore East and Lakeshore West corridors, and it is a key objective of The Big Move to introduce this service throughout the remaining five GO rail corridors.

An objective of The Big Move Update is to align the GO 2020 plan and The Big Move. The GO 2020 plan, identified the delivery of two-way all-day service to Meadowvale on the Milton Corridor in the 15 year planning horizon.

The Big Move identifies two-way, all-day service to Milton in the 15-year planning horizon. For the Milton corridor there are significant infrastructure and operational challenges that mean it will not be possible to deliver two-way, all-day service all the way to Milton in the 15-year time horizon.

Additional tracks and potentially numerous grade separations are necessary are a pre-requisite to the expansion of service to Milton. The construction is especially challenging through built-up areas. This rail corridor is largely owned by CPR, a private third party

operating freight rail. Their approval is required for any service and infrastructure expansion. Metrolinx continues to assess impacts, and negotiate with CPR, on ways to build the required infrastructure, recognizing the need to protect the natural and urban environment.

Two-way, all-day service can be delivered to Meadowvale in the 15-year timeframe, but the full extension to Milton can only be delivered over the 25-year horizon.

In the interim, Metrolinx continues to add additional peak services to Milton expand the frequent all day bus service in Milton as demand grows. Metrolinx is committed to the Milton corridor and will continue to make service improvements in advance of expanding to two-way, all-day rail service, including off-peak service.

Conclusions

Based on input received from municipal stakeholders and the public, the recommended changes in The Big Move Update presented at the December 5, 2012 Metrolinx Board meeting are still valid. The recommended changes include:

- In the description of the UP Express in the list of Top Transit Priority projects, add the word “electrified”
- Move the GO Bolton line to the 25-year plan
- Move the GO Havelock line to the 25-year plan
- Regional rail service (two-way all-day) for the outer sections of Milton, Kitchener, Barrie corridors change from 15 year plan to the 25-year plan
- Advance the eastern section of the “Downtown Core” rapid transit line from the 25-year plan to the 15-year plan and add to the list of the Top Transit Priorities
- Shorten the extension of the Richmond Hill GO line reflect the approved Environmental Assessment
- Update the mobility hub designations, moving the Oshawa GO mobility hub to the proposed new location identified in the approved Environmental Assessment on the CP Belleville subdivision
- Update Big Move #8 to incorporate the five strategic directions and supporting actions identified in the GTHA Urban Freight Study (2011)
- Change the content of Chapter 6, The Investment Strategy, anticipating the release of Metrolinx’ Investment Strategy in June 2013
- Add discussion of transit project prioritization to Chapter 7, Implementation
- Update maps to include recently added GO rail service to Kitchener
- No longer classify Highway 407 GO services east of Simcoe Street as Bus Rapid Transit
- Update maps to reflect the approved Environmental Assessment alignment of the GO Lakeshore East Oshawa/Bowmanville route

Appendix B, attached, provides a more detailed overview of the changes and their rationale.

Through The Big Move Update consultation, a number of helpful comments were received and will be valuable input to the full legislated review in 2016. Other comments are primarily either input to ongoing GO service planning or input to the Investment Strategy development. As such that input is being directed to the appropriate business unit.

Respectfully submitted,
Leslie Woo,
Vice-President, *Policy, Planning and Innovation*

APPENDIX A: MUNICIPAL INPUT RECEIVED ON THE BIG MOVE UPDATE

Submissions were received from the following municipal stakeholders:

- Durham Region received February 1, 2013
- Halton Region received January 25, 2013
- City of Burlington received January 31, 2013
- Town of Milton received December 4, 2012 and January 31, 2013
- Niagara Region received January 28, 2013
- Region of Waterloo received January 30, 2013
- Town of Markham received January 30, 2013
- City of Vaughan received January 30, 2013

The content of each submission is summarized in the table below; a copy of each full submission is available upon request.

DURHAM	
Durham Region Staff comments received February 1, 2013	
Comment	Response
1. Request that Metrolinx reconsider removing BRT designation on eastern section of Highway 407 in both 15 and 25 year plan	1. The planned level of transit service for this section of the Highway 407 corridor does not warrant BRT designation; Metrolinx will continue to provide regional GO bus services on the identified sections, and will continue to monitor demand for additional service
2. Request that Metrolinx modify the definition of "BRT on controlled-access expressway in mixed traffic with congestion management" to clarify anticipated level of service	2. The Update is not intended to change the vision, goals, objectives, policies or priority actions of The Big Move including project designations and definitions; this analysis is within the scope of a full legislative review, and will be considered in the legislated review in 2016
3. Request that Metrolinx maintain GO Havelock line in 15-Year plan, and consider extending it eastward and planning for two-way all-day service	3. Changes through the Update are on the basis of new validated technical analysis – additional network changes and extensions require further review and network analysis; this analysis is within the scope of a full legislative review, and will be considered in the legislated review in 2016
4. Hwy 404 extension to Highway 12 in Brock township be shown in 25-year plan as a "new transportation corridor"	4. By legislation, The Big Move must conform to the Growth Plan's transportation policies – this corridor was studied in the Highway 404

<p>5. Additional comments on the anticipated timing and justification for Next Wave projects, and recommendations for the Investment Strategy</p>	<p>Extension Davis Drive to Highway 12 Environmental Assessment completed in 2002, but is not identified as a future regional transportation corridor in the Growth Plan for the Greater Golden Horseshoe</p> <p>5. Metrolinx is dedicated to working in partnership with municipalities to implement all aspects of The Big Move; comments related to project funding and prioritization will be input into the development of the Metrolinx Investment Strategy</p>
HALTON	
<p>Halton Region Staff comments received January 25, 2013</p>	
Comment	Response
<p>1. Request that Metrolinx continue to monitor the demand for two way all-day service on the Milton and Kitchener Lines and, as part of the full update in 2016, Metrolinx review the opportunity to implement all day service on the Milton and Kitchener Lines within the 15-year Plan to support the transportation needs of Halton and the GTHA</p>	<p>1. Metrolinx is committed to continuing to make service improvements in advance of expanding to two-way all-day rail service, including off-peak service. To achieve full two-way all-day rail service, which includes off-peak services, substantial infrastructure is required. In bringing together The Big Move and GO2020 it was concluded that the GO2020 plan for service expansion was more reflective of potential timing of expansion.</p>
<p>City of Burlington Staff comments received January 31, 2013</p>	
Comment	Response
<p>1. No explicit comments were made about the recommendations in The Big Move Update</p> <p>2. The submission included general comments and questions about The Big Move that address specific actions and policies</p> <p>3. Additional comments were provided on The Big Move Progress Report and draft key performance indicators</p>	<p>2. The detailed comments provided are not currently under consideration as part of The Big Move Update, however, they are within the scope of a full legislative review, and will be considered in the legislated review in 2016</p> <p>3. Metrolinx appreciates input into the draft Progress Report. Staff are continuing to work on the draft Big Move Progress Report, and will consider the suggestions provided</p>
<p>Town of Milton Staff comments received December 4, 2012; council-approved submission received January 31, 2013</p>	
Comment	Response
<p>1. Request that Metrolinx reconsider the proposed delay of two-way, all-day GO rail service to Milton from a 15 year to a 16-25 year planning horizon</p>	<p>1. Metrolinx is committed to the Milton corridor and will continue to make service improvements in advance of expanding to two-way all-day rail service, including off-peak service. Metrolinx will look to add additional peak services to Milton in the near term, and will continue to expand the</p>

<p>2. Additional requests for express (non-stop) trains, the provision of a new GO Station, and a pilot project for intensification at the Milton GO Station</p>	<p>frequent all day bus service in Milton as demand grows.</p> <p>The Milton line operates almost entirely on a very important CPR freight corridor. Any potential expansion plans would need to address the requirements of the corridor owner, and discussions between Metrolinx and CPR are ongoing. As a precursor, the extension of two-way, all-day service as far as Meadowvale is expected to require substantial work. In bringing together The Big Move and GO2020 it was concluded that the GO2020 plan for service expansion was more reflective of potential timing. Additional tracks and potentially numerous grade separations are necessary to support two-way all-day service to Meadowvale, and also a pre-requisite to the expansion of service to Milton. Some of the construction is especially challenging through built-up areas.</p> <p>1. Metrolinx is committed to improving services and partnering with municipalities to implement The Big Move, and will consider the potential for an additional station in the Milton area near Trafalgar Road as development warrants, as well as incremental infrastructure improvements that will support the longer term development of all day service</p>
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NIAGARA

Niagara Region

Staff comments received January 28, 2013

Comment	Response
<p>1. Request that Metrolinx extend all-day service on the Lakeshore line to Niagara Region as part of the 25-year plan, based on the 2011 Environmental Study Review of the Niagara Extension and its role in supporting implementation of the Regional Growth Management Strategy</p>	<p>1. Metrolinx currently provides seasonal rail service to Niagara; additional network changes and extensions require further review and network analysis; this analysis is within the scope of a full legislative review, and will be considered in the legislated review in 2016</p>
<p>2. Niagara Region plays a significant role in goods movement within the Greater Golden Horseshoe, and as such, warrants mention in the proposed text for Strategy #9 and Big Move 8</p>	<p>2. The policy and strategy apply to the entire region, and do not explicitly reference specific municipalities</p>
<p>3. Support for the construction of a new corridor, above the Niagara Escarpment, parallel to the QEW, linking Niagara Region to the 403, 401 and beyond</p>	<p>3. There is currently a provincial Environmental Assessment process underway for this corridor, which will provide new data that can be applied in the full legislated review in 2016</p>

WATERLOO

Region of Waterloo

Committee-approved submission received January 30, 2013	
Comment	Response
1. Request that Metrolinx continue to plan and advance additional rail passenger service to Kitchener-Waterloo	1. Metrolinx is committed to improving services and partnering with municipalities to implement The Big Move; The Big Move does not include detailed service planning, but these comments will be input into GO's ongoing work to monitor and implement incremental transit service improvements across the GTHA
YORK	
Town of Markham Council-approved submission received January 30, 2013	
Comment	Response
1. Concern about the timing of specific projects within The Big Move and perception that projects have been delayed to beyond 2031	1. The timing of the projects identified are not impacted by the changes proposed through The Big Move Update; separate correspondence with Markham will address the specific issues raised
2. Additional comments about the timing of funding and implementation of Next Wave priority projects	2. Metrolinx is dedicated to working in partnership with municipalities to implement all aspects of The Big Move; comments related to project funding and prioritization will be input into the development of the Investment Strategy
City of Vaughan Committee-approved comments received January 30, 2013	
Comment	Response
1. Request that Metrolinx consider the inclusion of the following transit projects and initiatives in The Big Move: <ul style="list-style-type: none"> o extension of the Toronto-York Spadina Subway Extension further northwards, from Jane to Major Mackenzie o rapid transit along Major Mackenzie Drive o designate additional Gateway Mobility Hubs at Vaughan Mills, Major Mackenzie and Jane, and Promenade Mall o designate new Gateway Zones 	1. Changes through the Update are on the basis of new validated technical analysis; additional network changes and extensions require further review and network analysis; this analysis is within the scope of a full legislative review, and will be considered in the legislated review in 2016
2. Additional comments including request for accelerated implementation of GO services, additional projects for potential identification as priority projects, and comments on the approach to funding and implementation of projects in The Big Move	2. Metrolinx is committed to improving services and partnering with municipalities to implement The Big Move; these comments will be input into GO's ongoing work to monitor and implement incremental transit service expansion; comments on funding tools and principles will be input into the development of Metrolinx's Investment Strategy.

Additional Municipal Reports

Town of Caledon

- Town staff presented to Council Workshop on January 15, 2013
- This staff presentation provided detail on the Bolton Commuter Rail Feasibility Study and the Metrolinx Next Wave Projects
- GO Rail services to Bolton and rapid transit services to Mayfield West are identified as a notable omission from the Next Wave
- Based on this presentation, it is anticipated that Metrolinx will be requested to expedite both GO Rail services to Bolton and bus rapid transit extension of the Hurontario corridor to Mayfield West, and provide additional frequent bus service to Bolton in order to grow transit demand and support Bolton as a major transit hub.

APPENDIX B: PROPOSED CHANGES TO THE BIG MOVE, 2008

Map
Reference

CHAPTER 4.0 STRATEGIES

Strategy #1: Build a Comprehensive Regional Rapid Transit Network

1. Update The Big Move's portrayal of regional rail (two-way all-day GO service) in the 15-year and 25-year plan map to align The Big Move and GO2020 and based on the most recent planning work on phasing of all day service. Shift the following sections of regional rail service to the 25-year plan:

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| • Milton line, between Meadowvale and Milton; | (map edit A) |
| • Kitchener line, between Mt. Pleasant and Georgetown; and | (map edit B) |
| • Barrie line, between E. Gwillimbury and Bradford. | (map edit D) |

This change will make the 15-year plan for Regional Rail (full day, 2-way) service consistent with the core network identified in GO2020, and identifies the sections of corridors noted above as Regional Rail peak period only. This change is also consistent with current phasing plans for all day service.

2. In the description of the Air Rail Link in the list of Top 15 Transit Priorities, add the word "electrified."

- This reflects the recommendation of the GO Electrification Study, and the phasing plan of that study: electrify the Airport Rail Link first, before electrifying the GO Lakeshore line (also a top priority within The Big Move) and the balance of the Kitchener corridor.

3. Move the GO Bolton line from the 15-year plan to the 25-year plan. (map edit C)

- This reflects the findings of the 2010 *Bolton Feasibility Study* which concluded that 2031 ridership was very modest in

**Map
Reference**

relation to the very high capital costs required to initiate the service given the need to double-track the corridor.	
4. Move the GO Havelock line (Union to Locust Hill in Markham) from the 15-year plan to the 25-year plan.	(map edit E)
<ul style="list-style-type: none"> Due to very modest ridership potential and significant infrastructure and operational challenges related to the Agincourt rail yards. 	
5. Advance the eastern section of the “Downtown Core” rapid transit line (a.k.a. Downtown Relief Line) from the 25-year plan to the 15-year plan and the Top 15 Transit Priorities.	(map edit F)
<ul style="list-style-type: none"> This change reflects analysis on the capacity constraints of the Yonge subway reported in the TTC’s <u>Downtown Rapid Transit Expansion Study (DRTES)</u>. Further study, including transit network considerations, is required before the scope and alignment of this project are decided. 	
6. Make the Richmond Hill extension slightly shorter, terminating at Bloomington Rd. instead of Aurora Rd.	(map edit I)
<ul style="list-style-type: none"> This reflects the conclusions of the 2009 <u>Richmond Hill Rail Service Extension</u> Environmental Assessment. The proposed Aurora Rd. station was listed as “not preferred” due to a number of environmental factors. A station at Bloomington Rd. will offer adequate access to drivers on Highway 404. 	

Strategy #7: Build Communities that are Pedestrian, Cycling and Transit Supportive

7. Update the mobility hub designations:

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| <ul style="list-style-type: none"> Move the Oshawa GO mobility hub to the proposed new location identified in the approved Environmental Assessment on the CP Belleville subdivision, north of the 401. | (map edit H) |
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**Map
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Strategy #9: Goods Movement

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| <p>8. Update Big Move #8 – A Comprehensive Strategy for Goods Movement – to incorporate the five strategic directions and supporting actions identified in the GTHA Urban Freight Study (received by the Metrolinx Board of Directors in February 2011), as well as note coordination with the Ontario Multimodal Goods Movement Strategy that is currently in draft.</p> | <p>(Not on map.
See following pages for proposed text)</p> |
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- The overall objective is to revise Big Move #8 to reflect the strategic directions adopted by the Metrolinx Board, rather than only the need to “develop a comprehensive goods movement strategy.”

CHAPTER 6.0 INVESTMENT STRATEGY

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| <p>9. Focus this chapter on the June 2013 release of a new Investment Strategy, while retaining section 6.1 “Costs of the RTP”.</p> | <p>(Not on map.
See following pages for proposed text)</p> |
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- The “Costs of the RTP” section 6.1 and the box containing Big Move #9 will be retained by merging it into Chapter 5.0 “Looking Ahead.”
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- Anticipating the Metrolinx’ Investment Strategy in June 2013, the remaining parts of this chapter would be out of date at that time. Hence sections 6.2 – 6.4 are revised to ensure coordination with the upcoming Investment Strategy.

CHAPTER 7.0 IMPLEMENTATION

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| <p>10. Add discussion of transit project prioritization to section 7.2.2.</p> | <p>(Not on map.
see TBM p. 78)</p> |
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- Metrolinx has adopted a prioritization process that was not contemplated in detail in 2008.

MAP UPDATES *in addition to those required by Strategy #1*

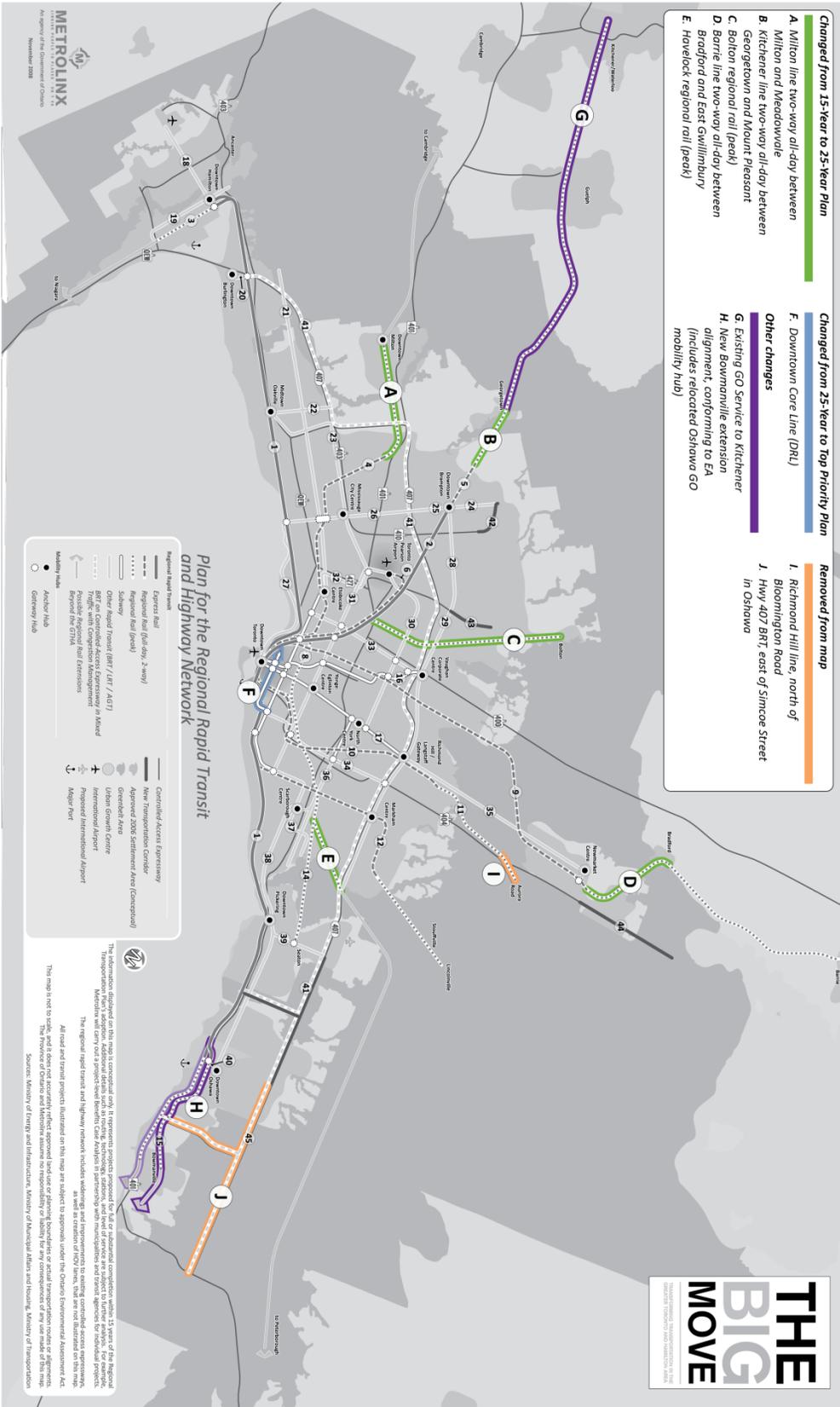
- | | |
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| <p>11. Show existing GO services to Kitchener in the maps similar to the</p> | <p>(map edit G)</p> |
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**Map
Reference**

portrayal of services to Barrie.	
<ul style="list-style-type: none"> In 2008, this was a potential service outside Metrolinx' jurisdiction. Today, the service is in operation. 	
12. Remove GO 407 bus services in Durham shown running from Simcoe St. to Highway #35 / 115.	(map edit J)
<ul style="list-style-type: none"> Highway 407 will extend to Highway #35 / 115 and GO intends to operate bus services along that route, but services in that section are not planned to be at a "BRT" level 	
13. Update the GO Lakeshore East Oshawa/Bowmanville route to reflect the Environmental Assessment recommended alignment.	(map edit H)

PLAN FOR THE REGIONAL RAPID TRANSIT NETWORK

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| <p>Changed from 15-Year to 25-Year Plan</p> <ul style="list-style-type: none"> A. Milton line two-way all-day between Milton and Meadowvale B. Kitchener line two-way all-day between Georgetown and Mount Pleasant C. Bolton regional rail (peak) D. Barrie line two-way all-day between Bradford and East Gwillimbury E. Havelock regional rail (peak) | <p>Changed from 25-Year to Top Priority Plan</p> <ul style="list-style-type: none"> F. Downtown Core Line (DRL) <p>Other changes</p> <ul style="list-style-type: none"> G. Existing GO Service to Kitchener alignment, conforming to EA (includes relocated Oshawa GO mobility hub) | <p>Removed from map</p> <ul style="list-style-type: none"> I. Richmond Hill line, north of Bloomington Road J. Hwy 407 BRT, east of Simcoe Street In Oshawa |
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Proposed Changes to BIG MOVE #8

Replace text on page 55 with the following:

BIG MOVE #8

A comprehensive strategy for goods movement.

9.1 Develop a comprehensive strategy for goods movement within the GTHA, and between the GTHA and other regions, that identifies opportunities and actions to improve efficiency, increase capacity, enhance the region's competitiveness, and reduce emissions of GHGs and other pollutants.

Priority actions for Urban Freight (goods movement within the GTHA):

- Build collaboration and support by strengthening and collaborating with multi-sectoral forums; establishing an inter-governmental freight committee; and improving and coordinating public outreach on urban freight, particularly with Provincial and municipal goods movement strategies.
- Improve urban freight information by strengthening data sharing on freight vehicles, routes and activities; and establish a GTHA urban freight data collection program.
- Increase transportation network efficiency for goods movement by developing and protecting a strategic GTHA truck network; harmonizing truck route standards and mapping; investigating intelligent lane utilization and truck-only lanes; and exploring opportunities to move freight on transit.
- Enhance planning and development by establishing freight-supportive land use guidelines; supporting development of innovative freight hubs; improving access to existing intermodal facilities; and planning and protecting complementary land uses near major freight hubs.
- Improve operational practices by using technology to optimize and manage the movement of goods; exploring opportunities for flexible freight delivery times; enhancing incentives to encourage off-peak deliveries; and implementing reserved curbside delivery options.
- Collaborate with MTO to develop and implement the Ontario Goods Movement Strategy.

Proposed Changes to Chapter 6, Investment Strategy

Replace text starting on page 68 with the following:

BIG MOVE #9

An Investment Strategy to provide immediate, stable and predictable funding.

Adopt the Metrolinx Investment Strategy to begin providing stable and predictable capital and operating funding to support the implementation of the RTP.

6.1 THE NEED FOR AN INVESTMENT STRATEGY

Consistent with Metrolinx legislation, Metrolinx is recommending a sustainable funding strategy that will ensure the regional transportation plan, *The Big Move*, is implemented.

World-class regional transportation authorities have suitable revenue sources to fund transportation. A global survey of leading transportation service providers demonstrates that funding through diverse, dedicated sources provides the certainty needed for efficient long-range planning and sustained network and service expansion. Leading regional transportation authorities also have a mandate to invest in all aspects of the transportation network – walking, cycling, transit, and cars – to seek the optimum investment; recognize the needs of different system users; and address the number of trips involving multiple modes.

Once implemented, an Investment Strategy will provide the GTHA the opportunity to join leading city regions across world where population growth is matched by appropriate, efficient improvements to transportation.

6.2 THREE-PHASED APPROACH TO INVESTMENT

Metrolinx's investments to date reflect the "results-first" imperative repeatedly emphasized by the public and stakeholders during consultations held by Metrolinx since its formation in 2006. Phase one of investments saw \$750 million in existing government revenues devoted to "Quick Wins" projects that financed quickly implementable service improvements across the GTHA. As a result of the "Quick Wins" funding, new subway cars and the first phase of a signal system to allow for more trains running closer together on the Yonge-University Subway in Toronto, and improved bus services across the region are in service.

Subsequent investments through Metrolinx saw new major projects announced, for a total of approximately \$16 billion in public resources committed by governments to larger-scale transit projects currently under construction. Projects include new subway, new underground and surface light rail transit, new rapid bus transit systems in Mississauga, Brampton, and York Regions, regional GO rail improvements, the new Union-Pearson Airport Rail Link and improved infrastructure on the Georgetown corridor, and major improvements to Union Station, the heart of the regional transit network. These projects will soon be entering service, improving access to employment, housing and services for residents throughout the GTHA while establishing Metrolinx's implementation credibility.

Together, these early investments represent one of the largest urban transportation investments in Canadian history. Government funding of this magnitude has enabled Metrolinx to break ground on transformational infrastructure projects that will provide new transportation options and congestion relief to existing corridors — all without seeking any new revenue sources and financial tools.

However, investment of this magnitude must be sustained over the long term. Governments can't be expected to sustain this level of record investment in the current fiscal environment. The Metrolinx Investment Strategy proposes new revenue tools, implemented responsibly, to provide consistent, dedicated funding for transportation over the longer term. The proposed revenue tools will align with several design principles drawn from the best practices of successful regional transportation authorities across the world.

The Investment Strategy will reduce planning and budgeting uncertainty by diversifying Metrolinx revenue streams and match long term planning to long-term budgeting and investing. The resulting predictability will mean that not only will Metrolinx be able to better implement its capital plan but also budget effectively for the operations, maintenance and rehabilitation costs. It is important to note that large capital projects generate benefits for all levels of government; and therefore specific large projects and programs will require support from all levels of government, in addition to new dedicated and predictable revenues.

6.3 TRANSPARENCY AND ACCOUNTABILITY MEASURES

Increased fiscal responsibilities must be matched by transparency, accountability and effective decision-making. Decision-makers will be accountable for the ways in which revenues raised are spent. Project evaluation methods and investment prioritization will be continually refined and continuous information about decisions and the information supporting those decisions made available to the public. Together these measures will help to match the region's expectations for improved mobility with Metrolinx's methods and resources for implementing its transportation plan. Metrolinx will deliver on the public's expectation for excellent decision-making, leadership, transparency, and accountability.

6.4 INVESTMENT PROFILE

The RTP capital and operating program is one of the most ambitious transportation programs in Canadian history. To see this program through, construction costs must be spread out using responsible long-term debt. Metrolinx will use debt appropriately and responsibly. Like a mortgage on a house, using long-term debt to finance major infrastructure enables the financial burden of that project to be paid by present and future beneficiaries, meaning people can benefit from the facility sooner. Additional revenues required will increase over time to better match the improved service people will experience.

Capital expenditures are also subject to the capacity of construction contractors and engineering firms to meet the labour and expertise needs entailed by the different projects. Labour and equipment shortages or the lack of enough engineering and design firms can raise construction costs and delay project completion dates, ultimately pushing the full realization of the RTP further down the road. Market readiness and the availability of skilled labour will therefore be an important consideration in the investment profile and system expansion will have to be scheduled accordingly. Metrolinx is already working closely with Infrastructure Ontario, in particular, to manage the capacity of the market to deliver this historic infrastructure build program. Metrolinx will continue to plan for and advance all projects, taking into consideration that implementation timelines for some projects are significantly longer than others.

Aside from upfront capital expenditures, the Investment Strategy will be implemented taking into consideration the need to support the ongoing operations, maintenance and rehabilitation costs of new and existing infrastructure. Furthermore, the benefits and costs of infrastructure and service improvements will be traded off to maximize efficiency in getting the best transportation system for each dollar invested.

6.5 KEY CHARACTERISTICS AND ASSUMPTIONS OF THE INVESTMENT STRATEGY

Each RTP project will be implemented using a procurement model that maximizes the ability of Metrolinx to implement projects, ensure value for money and limit exposure to project risks. It is assumed that in each case, private sector involvement in project design, construction and financing will be considered, wherever appropriate. According to Province of Ontario and federal government requirements, all large transit capital project proposals must be submitted for Alternative Financing and Procurement (AFP) evaluation, and AFP will be used where value for money is demonstrable.

Operating, rehabilitation and debt service costs resulting from ownership and control will be managed both on a program and project-by-project basis. Asset ownership and management will continue to evolve to reflect best practices. A complete asset management system will be put in place to optimize the use and management of capital assets.

Continuing current Metrolinx practice, maximizing the use and value of current assets will be pursued wherever possible. Metrolinx is already pursuing land value capture and other non-fare revenue strategies to raise revenue to fund the expansion and operation of the current and future system. Excellence in asset management and the pursuit of continuous business development is and will be a hallmark of the regional transportation system.