

Business Case for the Accelerated Extension of Highway 417

Prepared by:



and



Table of Contents

1	Executive Summary	1
1.1	Background	1
1.2	Importance of Highway 417/17 as the County's Transportation Backbone	2
1.3	Process	4
1.4	Major Findings	4
2	Business Case Methodology	5
3	Strategic Directions	7
4	Provincial and Federal Interests	9
5	Community Impact Analysis	11
5.1	North Grenville	11
5.2	Carleton Place	13
5.3	Town of Arnprior	14
5.4	Town of Renfrew	17
5.5	Industrial Impact Observations	18
5.6	Community Impact Observations	20
5.7	Expanded 417 - Key to Community and Economic Development Success	20
6	Stakeholder Consultations	22
6.1	Online Surveys	22
6.1.1	Industrial and Business Sectors	22
6.1.2	Elected Officials, CAO's & EDO's	23
6.2	Focus Groups	23
6.2.1	Tourism	23
6.2.2	Manufacturing & Construction	24
6.2.3	Elected Officials & Senior Staff	24
6.3	Observations from Focus Group Sessions	25
7	Rationale for Accelerating the Extension of Highway 417	26
7.1	Promote Economic Growth	26
7.2	Enhance Tourism	26
7.3	Sustain Communities	27
7.4	Enhance Safety	27
7.5	Improved Traffic Flows	28
8	Moving Forward	29
9	Appendix 1 - Letter of Support	30
10	Appendix 2 - Letter of Support	32

1 Executive Summary

With the completion of this business case, the County of Renfrew has provided the rationale, data, information and analysis to demonstrate there is an urgent need to accelerate the continued extension of Highway 417. The County acknowledges the construction of the Highway 417 extension is now proceeding from Campbell Drive to Scheel Drive and is to be completed in 2016.

As such, based on the data, research, findings and conclusions of this business case, the County of Renfrew would respectfully request that the Province:

- 1. Include the continued extension of Highway 417 as a key priority program within the province's five-year capital works program.**
- 2. Allocate funding for the continued extension of Highway 417 from Scheel Drive to the Town of Renfrew moving forward with the tender process for detailed design and construction (design-build tender) in its five-year capital programs with a goal of completion of the project in the next ten years.**
- 3. For the TransCanada Highway, the main access and supply route to Garrison Petawawa and the Canadian Nuclear Laboratories Inc., it is absolutely critical that the Minister of Transportation develop a predictable multi-year program to fund the planning and implementation of Route Planning Studies, Environmental Assessment updates, property acquisition and budget allocations for the continued extension of Highway 417 through the County of Renfrew.**

1.1 Background

In June 2012, the County of Renfrew requested the Province of Ontario accelerate the extension of Highway 417 west of Arnprior. In response to this request, the County of Renfrew was tasked by the former Minister of Transportation - Minister Bob Chiarelli - to develop a business case that demonstrates the need to accelerate the extension of Highway 417. The business case was required to identify the economic development benefits of the Highway 417 extension program and the impacts on job creation.

This report which has been updated in May 2015 provides the business case and supporting rationale for the continued extension of Highway 417.

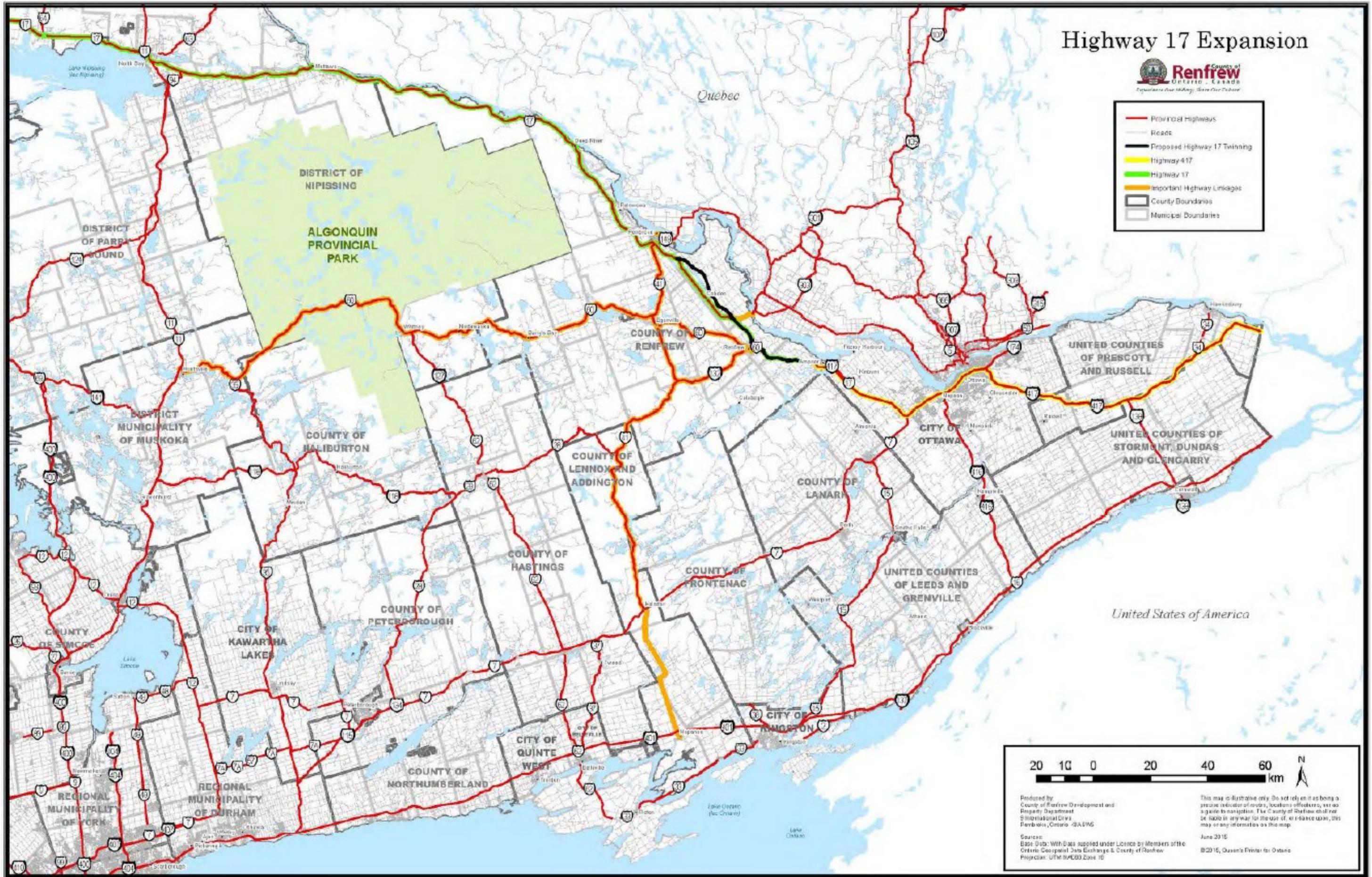
1.2 Importance of Highway 417/17 as the County's Transportation Backbone

As illustrated in the following map, the 417/17 highway acts as a crucial transportation backbone connecting both the Provinces of Ontario and Quebec as well as the various communities throughout and around the County of Renfrew. This backbone is further supported by a network of Provincial, County and Municipal roads that creates the cohesive transportation infrastructure to effectively move people and goods to locations within the County as well as other significant destinations such as the city of Ottawa, the Greater Toronto Area, the city of Montreal and the 401 corridor.

Highway 17 Expansion



- Provincial Highways
- Roads
- Proposed Highway 17 Twinning
- Highway 417
- Highway 17
- Important Highway Linkages
- County Boundaries
- Municipal Boundaries



20 10 0 20 40 60 km

Produced by
County of Renfrew Development and
Planning Department
Perth, Ontario - G8A 6W6

Source:
Base Data: With Data supplied under License by Members of the
Ontario Geospatial Data Exchange & County of Renfrew
Project: URBAN/03 Zone 10

This map is illustrative only. Do not rely on it as being a
precise indicator of roads, locations or features, nor as
a guide to navigation. The County of Renfrew shall not
be liable in any way for the use of, or reliance upon, this
map or any information on this map.

June 2015
©2015, Queen's Printer for Ontario

1.3 Process

This business case was developed through a collaborative partnership between the County of Renfrew elected officials, staff, business and community leaders throughout the County and McSweeney & Associates. Through a comprehensive analysis as well as a review of quantitative and qualitative data and information, this business case demonstrates that the continued extension of Highway 417 through the County of Renfrew is needed to generate very positive economic and community growth. This business case is based on a statistical perspective and reinforced by first-hand accounts, information, commentary and observations from those individuals who rely on Highway 17 for their livelihood – business owners as well as industrial, community and business leaders.

To develop the business case, the following in-depth research and thorough analysis was undertaken:

1. A review of the County's strategic preparedness to accommodate economic and community development;
2. Detailed data and statistical analysis, including examination of the effects of a four-lane highway extension on comparable communities; and
3. Online surveys, interviews and focus groups with the County of Renfrew's business, industry, political and community leaders as well as County staff and municipal economic development professionals within the County.

1.4 Major Findings

As a result of the exhaustive and comprehensive examination detailed above, it is clear that a continuous four-lane limited access highway will allow the County of Renfrew the opportunity to achieve its strategic community and economic development goals. As such, Highway 417 **NEEDS TO BE EXTENDED NOW** in order to:

- Promote Economic Growth
- Enhance Tourism
- Sustain Communities
- Enhance Safety, and
- Improve Traffic Flows.

The extension of Highway 417 is one of the County of Renfrew's highest priorities as identified in their Corporate Strategic Plan. This business case validates that the continued accelerated extension of Highway 417 through the County is needed to provide the necessary infrastructure required to drive positive and sustainable economic and community development.

2 Business Case Methodology

The County of Renfrew has, on numerous occasions, made representations to the Province requesting they continue the Highway 417 extension program. The County of Renfrew is very appreciative of the Province's commitment to this program to date and remains hopeful that funding commitments for the Highway 417 extension program will be allocated in future Provincial budgets. The County commends the Province for funding the continuation of the Highway 417 extension program from the westerly limit of the Town of Arnprior to Scheel Drive.

In June 2012, then Minister of Transportation and Infrastructure, the Hon. Bob Chiarelli, met with a County of Renfrew delegation to discuss funding commitments for the extension of Highway 417. At that time, the Minister strongly suggested that the County develop a business case for the expansion of Highway 17 within the County. The Minister indicated that the business case should clearly identify the economic development benefits of a highway expansion program and the resultant impact on job creation.

In response to the Minister's comments, the County initiated a request for proposal (RFP) process and retained a consultant to assist with the development of a business case.

The terms of reference for the RFP required that the following activities be undertaken:

- data collection relevant to population growth and demographics
- public consultation and interfacing with County economic development stakeholders
- identification of local trends in manufacturing, agriculture, natural resources extraction and processing
- research of economic development trends and opportunities
- analysis of future transportation requirements for goods and people
- analysis of tourism and commuter transportation trends
- undertake a S.W.O.T analysis to identify issues that need to be addressed to improve investment readiness capacity in order to capitalize on new economic opportunities associated with a Highway 417 extension.

On completion of the above activities, the successful consultant was required to produce a final report that would include the following deliverables:

- economic development rationale for accelerating the extension of Highway 417
- undertake a qualitative analysis to substantiate the major economic benefits that would accrue with the extension of Highway 417
- an examination of the impact of 400 series highway expansions to similar sized communities
- undertake a quantitative analysis to estimate the annual economic impact of accelerating the extension of Highway 417
- undertake a "high-level scan" of the County and its municipal partners with respect to economic readiness
- an examination of the County's priorities and how they align with the Province's Building Together strategies

- consultation with County and municipal officials to determine current economic development priorities.

McSweeney & Associates was originally awarded the contract to conduct the research and analyses identified in the terms of reference. An update to the data and an insertion of new sections were added in the 2015 update. Based on ongoing discussions with County of Renfrew businesses and municipalities, the County of Renfrew and McSweeney & Associates have worked together as a team to complete the research, analysis, preparation and update of this business case.

3 Strategic Directions

In 2013, County Council adopted a strategic plan that has mapped out specific priorities and actions that will further the County's vision.

The County's new Official Plan, in conjunction with the Corporate Strategic Plan priorities, will provide the "blueprint" for future economic development initiatives within the County.

The County of Renfrew currently has a very diversified economy with strengths in agriculture and agribusiness, forestry and wood products, manufacturing, aerospace and defence, scientific research and development, tourism and creative industries. To some degree these sectors are all resource based and they rely significantly on export markets, primarily the United States. This reliance has resulted in an economic hardship within the County since these export markets have been in decline. For economic and community sustainability, the County must, in the long term, continue to expand and diversify its economy and engage in more value-added processing and production. In order to move forward and become a progressive regional community, the County must focus on its:

1. Community Well-being
2. Economic Opportunities
3. Community Sustainability and Viability.

The County's Corporate Strategic Plan (approved in 2013) has identified the following seven strategic priorities to guide the delivery of County services:

1. Promote an expanded, four-lane Highway 417
2. Develop a long-term Asset Management Program
3. Develop a Linked Trail System
4. Promote Active Transportation
5. Launch an Economic Development Roundtable
6. Create a Small Business Investment Fund
7. Foster Health Promotion and Disease Prevention Programs.

Each strategic priority has specific action plans with a focus on economic and community development, social and health services, public works and transportation.

Based on consultation with business and community representatives, the extension of Highway 417 has been and continues to be a high priority for the County of Renfrew.

With the County's Corporate Strategic Plan providing direction for the future, the County of Renfrew intends to be a strong, diversified, healthy and sustainable community. It will be an attractive place for residents, businesses and tourists to invest both their time and money.

In order to achieve these objectives (and for the County to reach its full potential), it is vital that the County is served by an efficient road transportation system. This requirement is critical since the County of Renfrew does not have a public transit system or a rail system. The County's road infrastructure is the only transportation network available and provides

the sole means of supporting the vast transportation needs of the entire County community and economy.

The County's strategic vision reinforces the direction that the County of Renfrew is committed to providing Canada's leading lifestyle experience featuring safe, thriving and affordable communities, supported by a commitment to creating opportunities to prosper economically.

As referenced above, the County intends to achieve its vision, in part, through targeted strategic economic development initiatives and actions. The County is already home to clusters of advanced manufacturing, agri-business, creative industries, forestry and wood processing, green economy and energy, life sciences, scientific research and development, mining and tourism businesses. By building on its economic strengths and promoting these sectors, the County of Renfrew is poised to succeed. However, in order for these ambitious goals to be achieved, certain pieces of infrastructure still need to be put in place; the most important being the extension of Highway 417.

4 Provincial and Federal Interests

Garrison Petawawa and Canadian Nuclear Laboratories Inc. (CNL) represent two significant employers within the County. These two community partners employ over 10,000 County residents and are solely reliant on moving people and goods via the County's main transportation corridor – Highway 17/417. The extension of 417 would not only support the growth and well-being of these two major employers, but would also aid in the sustainable development of the County's existing and emerging industrial sectors.

The Canadian Nuclear Laboratories Inc. employs 2,900 people making this employer the largest concentration of scientific research and development in all of Canada. In fact, for over 70 years CNL has been Canada's key nuclear science research and development centre. All CNL technical, professional, research, administrative, environmental and engineering staff commute via Highway 17 from area communities as far away as Arnprior and Ottawa. There is also significant truck and commercial traffic providing services, materials and support to the nuclear laboratories and reactor. Sensitive products in the form of radioactive waste and isotope material are being shipped in and out of the laboratory site via Highway 17. An extended Highway 417 would assist CNL in attracting a talented and sought after workforce as well as enabling a more efficient and safer means of moving sensitive materials.

Garrison Petawawa is the Canadian Forces pre-eminent Base. Garrison Petawawa is home to Canada's largest concentration of military personnel and is located just west of the Town of Petawawa and east of CNL. As the main thoroughfare, Highway 17 traverses directly across Garrison Petawawa and is the principal commuting route for the approximately 8,000 uniformed and civilian personnel employed on the Base. Garrison Petawawa relies heavily on Highway 17 for the movement of troops, vehicles and material across Canada and to airports and ports for international destinations. Military vehicles of all sizes such as Light Armoured Vehicles (LAVs), transports, fuel tankers and buses are constantly utilizing Highway 17 for training purposes and for travel to other military bases including National Defence Headquarters in Ottawa. It is also home to 2 Canadian Mechanized Brigade Group (CMBG), Canadian Special Operations Regiment (CSOR), 427 Special Operations Aviation Squadron (SOAS) and the 450 Tactical Helicopter Squadron which operates 15 of the new Chinook F Model medium-heavy lift helicopters.

The day-to-day challenges presented to commercial and civilian traffic by slow-moving convoys of military vehicles on Highway 17 would be dramatically improved with the extension of Highway 417. Additionally, a more efficient and higher capacity Highway 417 would enhance the day-to-day operations and delivery of material and fuel to Garrison Petawawa and would also enable a more rapid and efficient deployment of military personnel and equipment in times of domestic or international disasters, national defence and security situations.

From a Provincial perspective, it is recognized that Highway 17/417 through the County of Renfrew is the key trucking and automobile route to the expanding natural resources and processing activities of Northern Ontario. The Highway 17/417 network, as well, provides

critical access to the city of Ottawa, Eastern Ontario, the Greater Toronto Area, city of Montreal, and the 401 corridor including the various fresh water ports located along this important trade route. It is the most direct east/west highway corridor from eastern Ontario and eastern Canada to Ontario's northwest and the western provinces, territories and Pacific ports.

It should be noted that the Highway 17/417 corridor forms an integral part of the Trans-Canada Highway and is also designated as a Core Route in the National Highway System. As such, Highway 17/417 has been acknowledged from a federal perspective as a vital network in support of Canada's economy and a critical transportation corridor for all Canadians.

5 Community Impact Analysis

A statistical analysis was conducted (and updated in 2015) by McSweeney & Associates in order to determine the actual cause and effect of an expanded four-lane restricted access highway on comparable communities. The rationale used for the identification of comparable communities considered those communities that were of a similar size to the County of Renfrew and those that were located within a similar proximity to the city of Ottawa.

As comparators, the following four (4) communities were identified as meeting the above mentioned criteria:

- North Grenville
- Carleton Place
- Town of Arnprior
- Town of Renfrew.

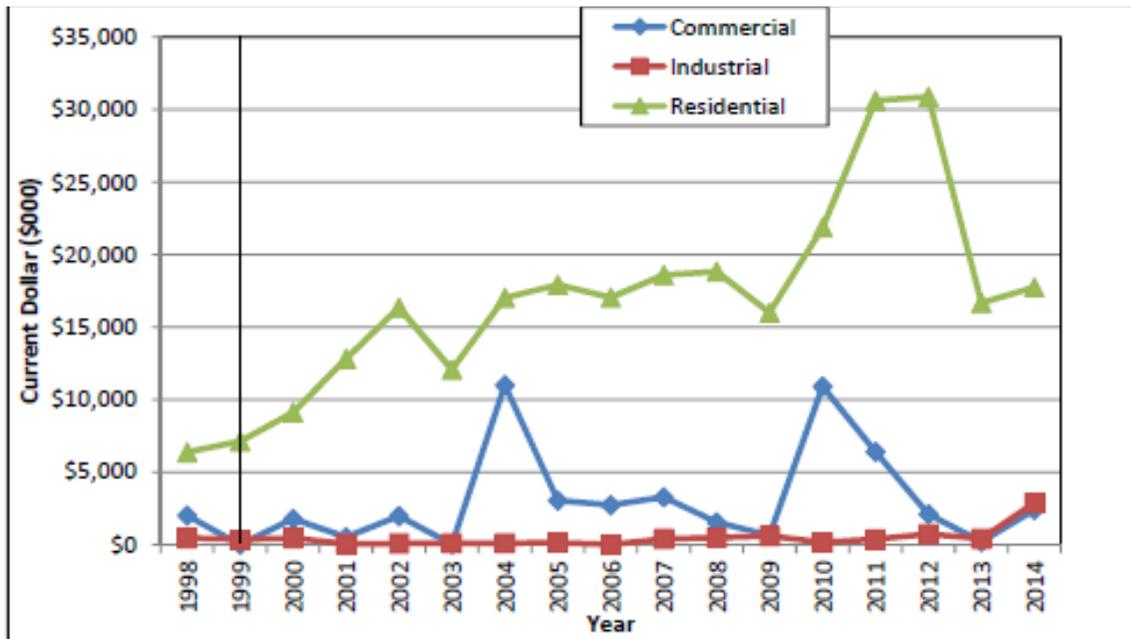
The underlying goal of the comparable community analysis was to quantify the positive effects and impacts of extending a four-lane restricted access highway to comparable rural communities.

5.1 North Grenville

The Municipality of North Grenville includes the community of Kemptville. Located to the south of the city of Ottawa (58 kms from downtown Ottawa), North Grenville is situated directly on Highway 416. Proposed in the mid-1960's, Highway 416 was developed specifically to link Ottawa to Highway 401. The expansion of Highway 416 was completed in 1999.

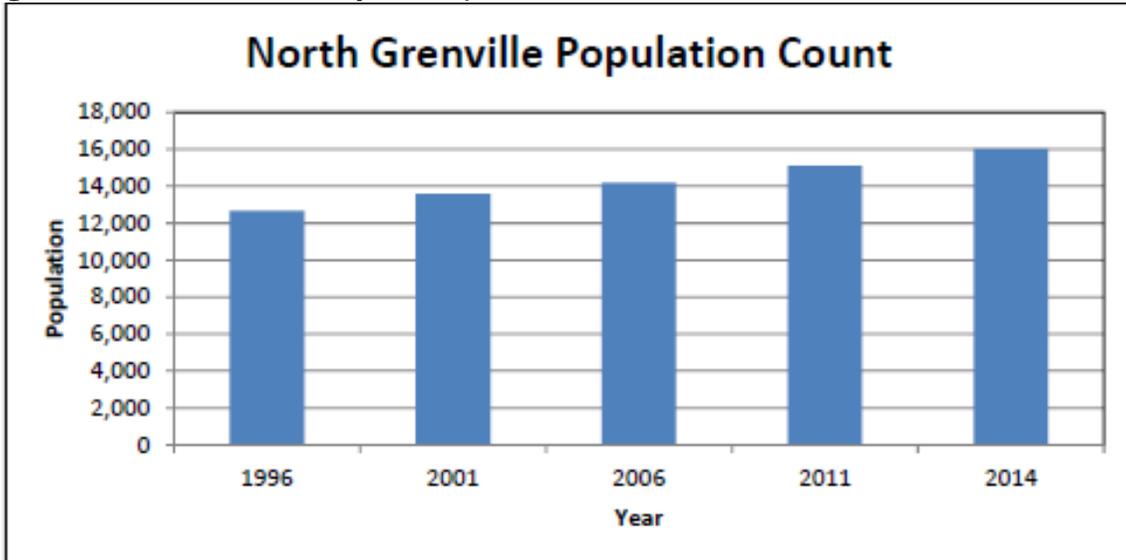
Figures 1 and 2 demonstrate a marked increase in commercial and residential development activity as a result of the expanded provincial highway to North Grenville. As well, it is apparent that the North Grenville community continues to grow as a result of quick, easy and safe access into the city of Ottawa via Highway 416.

Figure 1: North Grenville Building Permit Values



Source: Statistics Canada/Statistique Canada, Investment and Capital Stock Division.

Figure 2: North Grenville Population, 1996-2014



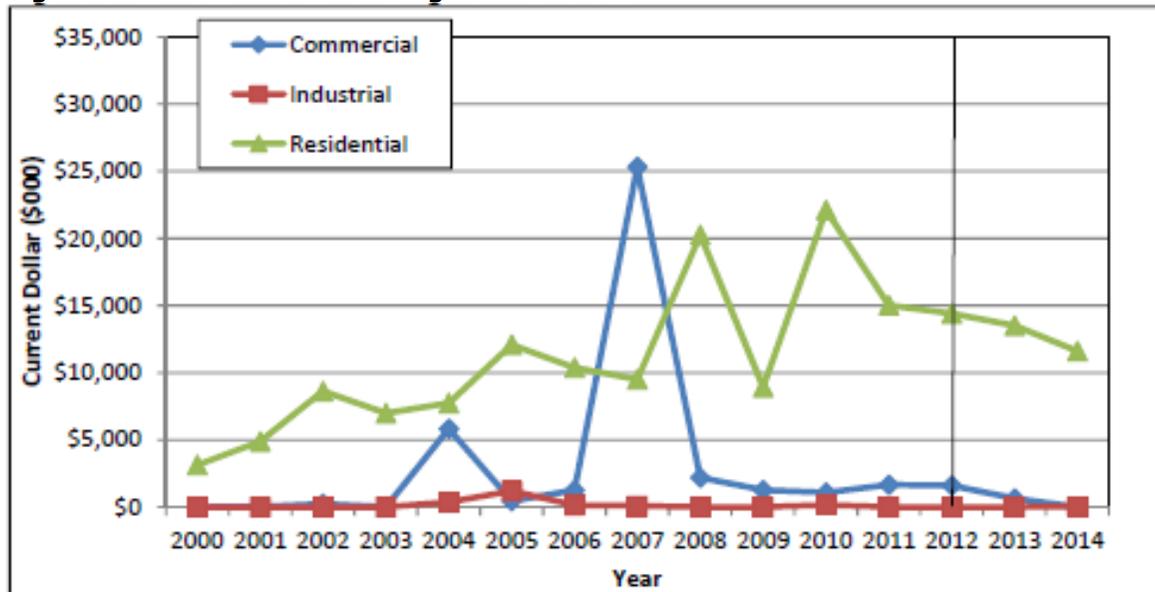
Source: Statistic Canada, Census 1996, 2001, 2006 and 2011. And Manifold 2014 Superdemographics.

5.2 Carleton Place

The town of Carleton Place is located to the south-west of the city of Ottawa. Being 53 kms from downtown Ottawa, Carleton Place is located at the end of an expanded four-lane Highway 7. The expansion of Highway 7 was undertaken due to an increase in the population in Carleton Place and, as well, to address safety concerns stemming from commuters traveling into Ottawa to work each day. The highway expansion was completed in 2012.

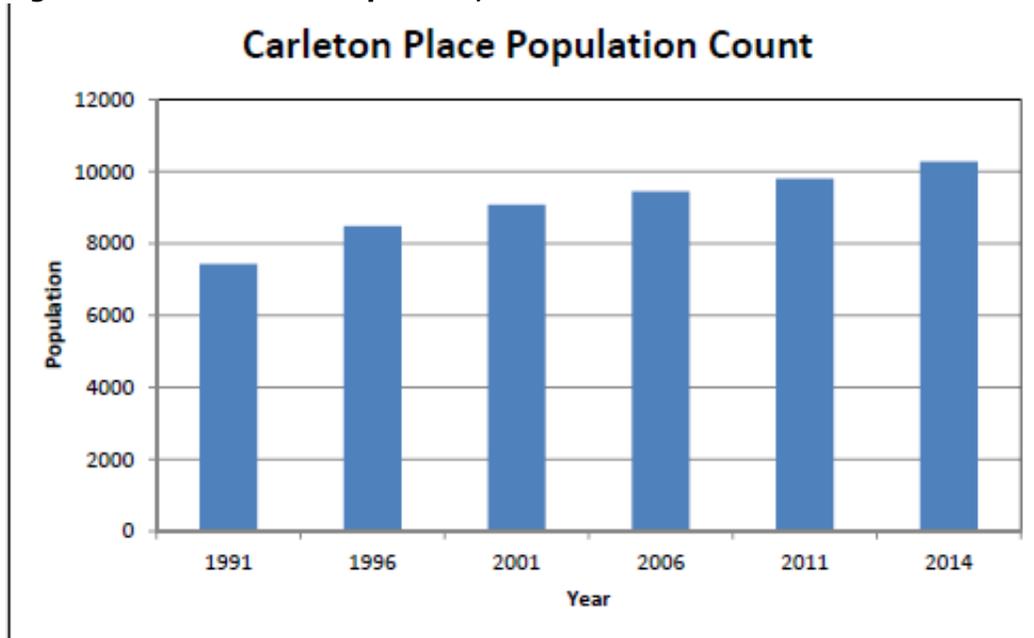
Figures 3 and 4 illustrate the marked increase in commercial and residential development activity in Carleton Place. It is interesting to note that the town of Carleton Place began to grow more quickly when the expansion of Highway 7 was initiated in 2006. Similar to North Grenville, this community has continued to grow as a result of quick, easy and safe access into Ottawa via Highway 7.

Figure 3: Carleton Place Building Permit Values



Source: Statistics Canada/Statistique Canada, Investment and Capital Stock Division

Figure 4: Carleton Place Population, 1991-2014



Source: Statistic Canada, Census 1996, 2001, 2006 and 2011. And Manifold 2014 Superdemographics.

5.3 Town of Arnprior

The Town of Arnprior is situated approximately 66 kms west of downtown Ottawa and is located adjacent to the Highway 17/417 corridor. The extension of Highway 417 to the easterly limit of Arnprior was completed in 2006. The Arnprior bypass was completed by the Province in 2012. Effectively, Highway 417 now extends to the westerly limit of the Town of Arnprior. The extension of Highway 417 to Arnprior was undertaken due to the Province's commitment to "*building a highway infrastructure system that will sustain and strengthen our growing economy*"¹.

The vital importance of multi-lane highway service to industrial, commercial and residential investment has been clearly demonstrated in Arnprior. During the significant economic crisis which began in 2008 (and which devastated manufacturing, forestry, natural resources extraction/processing and exports across Canada) business in Arnprior remained relatively stable. This trend occurred in conjunction with the extension of Highway 417 west from the city of Ottawa to the town. The four-lane highway has greatly enhanced travel to Ottawa and has connected Arnprior to other multi-lane highways, major Canadian and international centres, critical ports and border crossing points.

Our research confirms that there has been significant growth in housing including multi-unit residential construction in Arnprior. As well, manufacturing enterprises have expanded

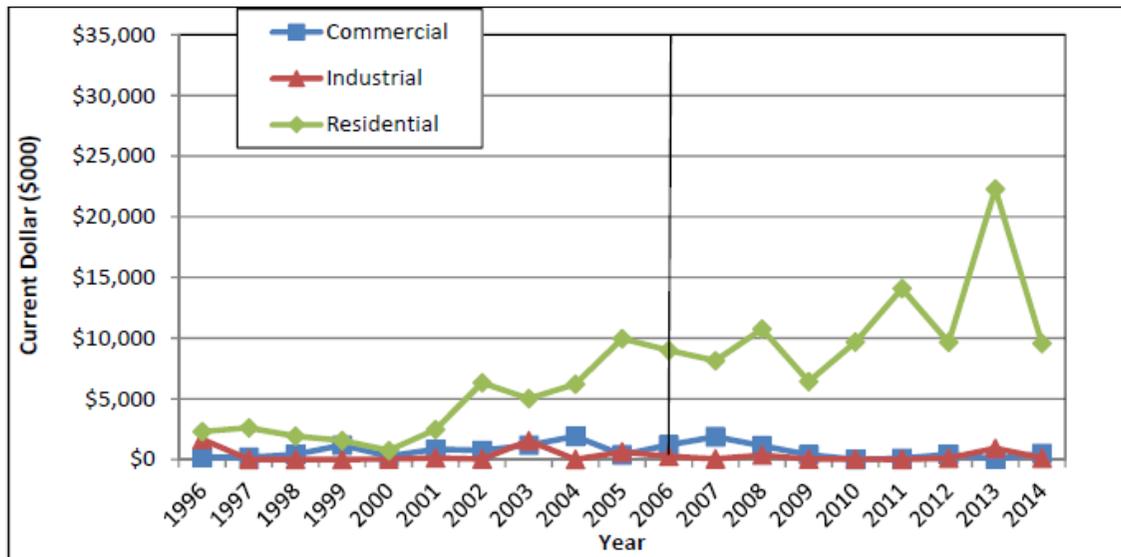
¹ January 21, 2002 MTO backgrounder

overall and the retail sector has grown slightly. More importantly, key industrial operators in severely challenged sectors such as pharmaceuticals, textiles, machined parts, aerospace and mechanized equipment survived the downturn. In some cases, companies such as Pillar 5 Pharma and Plaintree Systems, have actually expanded their operations in the Town of Arnprior. Furthermore, there has been re-investment in Arnprior’s existing service and commercial sectors. The positive economic development events experienced in Arnprior were not consistent with the pattern of closures and downsizing that are typically associated with an economic downturn. The Town of Arnprior realized improved market access, consumer awareness and employee commuting ability as a direct result of the extended Highway 417.

To accommodate the anticipated residential, commercial and industrial expansion, there was a noticeable and significant increase in investment by land developers and builders in advance of the extension of Highway 417 and in direct anticipation of the economic opportunities.

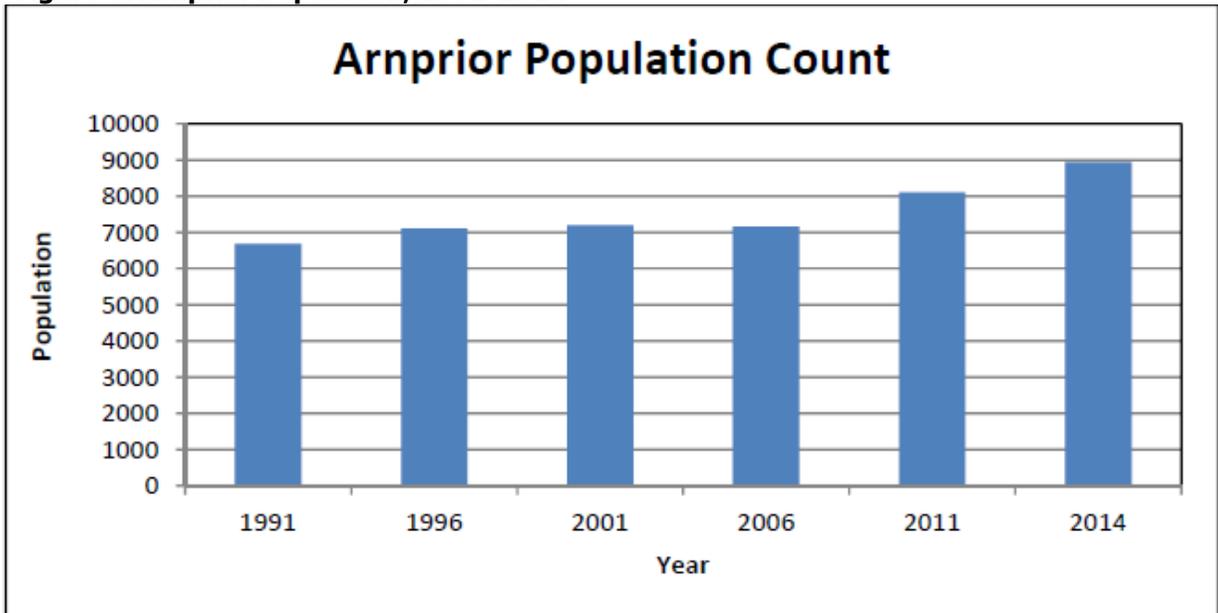
Figures 5 and 6 illustrate the marked increase in community development activity in the Town of Arnprior. The increase in residential building permit data from 2002 onward demonstrates the positive impacts that an extended Highway 417 has on community development. The Town began to see a marked increase in residential development shortly after the Provincial funding announcement and commitment in 2002 to extend Highway 417 to Arnprior.

Figure 5: Arnprior Building Permit Values



Source: Statistics Canada/Statistique Canada, Investment and Capital Stock Division.

Figure 6: Arnprior Population, 1991-2014



Source: Statistic Canada, Census 1996, 2001, 2006 and 2011. And Manifold 2014 Superdemographics.

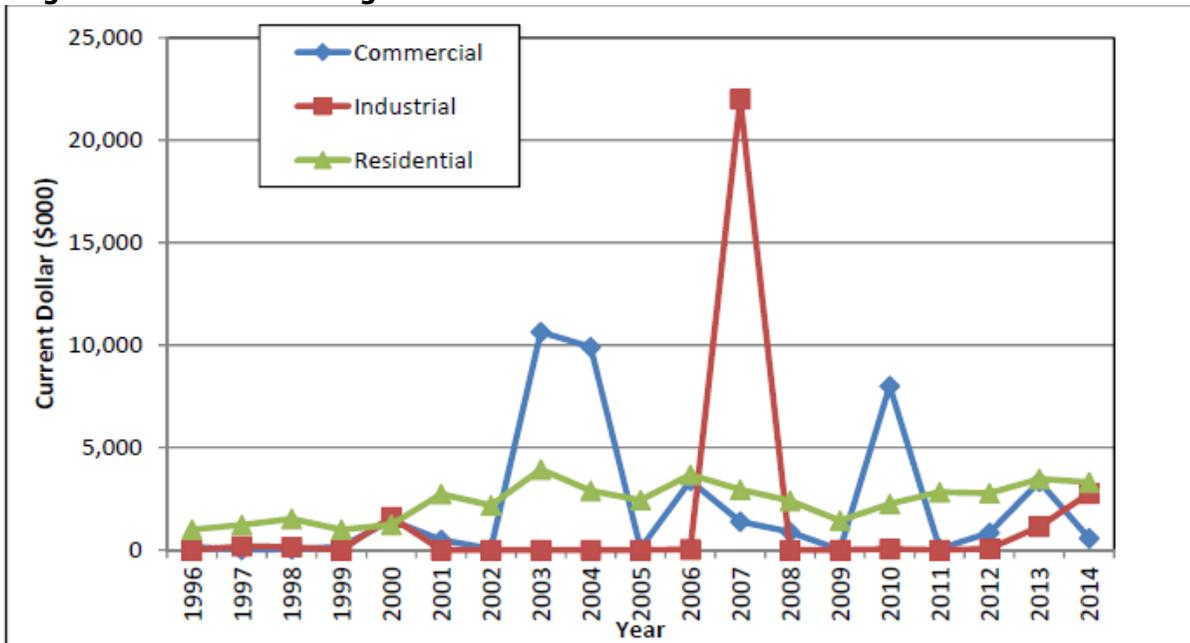
From an industrial development perspective, although the building permit data for Arnprior appears to present an image of fairly stagnant industrial growth, this could not be further from the truth. In fact, with the extension of Highway 417 to the eastern borders of Arnprior in 2006 and in 2012, two large industrial buildings have been purchased and upgraded. These facilities now accommodate new manufacturing by Pacific Safety Products, Plaintiff Systems and Arnprior Fire Trucks. Other smaller industrial spaces were also re-purposed and have been filled with new business tenants. Therefore, while there has been limited industrial construction of new buildings, there has been significant new investment.

5.4 Town of Renfrew

The Town of Renfrew sits approximately 95 kms west of downtown Ottawa. It is approximately 32 kms from the section of Highway 417 that was extended to the eastern boundary of the Town of Arnprior in 2006.

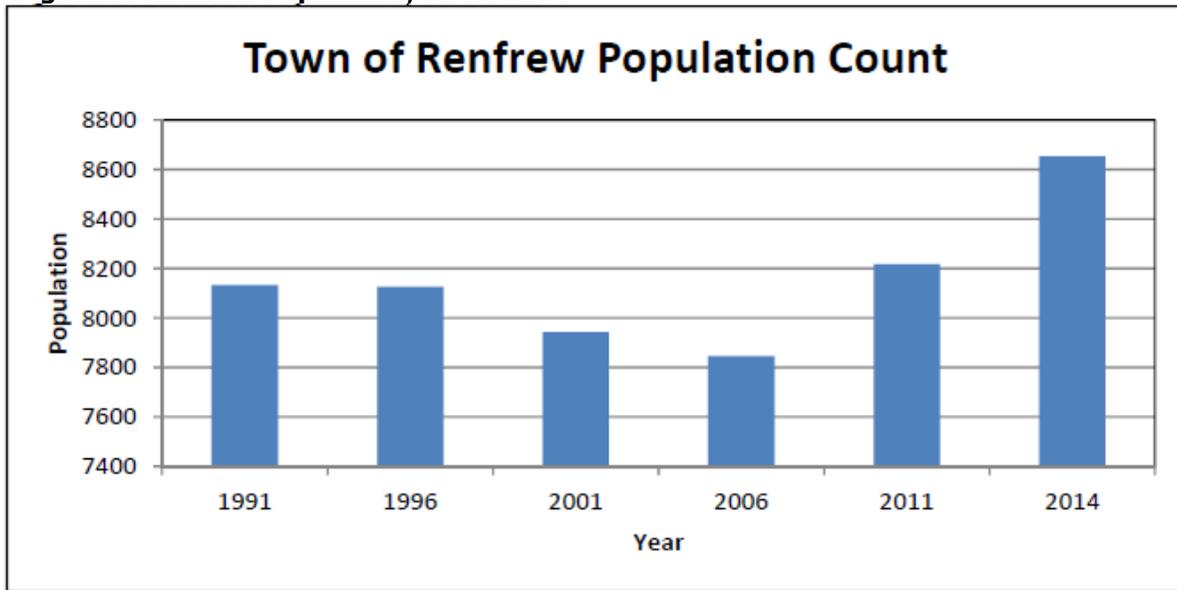
An examination of Renfrew’s population trend since the early 1990s (reference Figures 7 and 8) illustrates the cause and effect associated with a four-lane restricted access highway. Although the population of the Town of Renfrew was in steady decline from 1996 to 2006, that trend was completely reversed when the extension of the Highway 417 to the Town of Arnprior was completed in 2006 thereby providing nearby access to the Highway 417 corridor for Renfrew residents and businesses. By 2011, Renfrew’s population had not only rebounded, but in fact has surpassed levels not experienced since 1991. This demonstrates, as in Renfrew’s case, that having access to a four-lane restricted access highway such as the Highway 417 clearly provides much needed positive community development to a community whose population is in decline.

Figure 7: Renfrew Building Permit Values



Source: Statistics Canada/Statistique Canada, Investment and Capital Stock Division.

Figure 8: Renfrew Population, 1991-2014



Source: Statistic Canada, Census 1996, 2001, 2006 and 2011. And Manifold 2014 Superdemographics.

In terms of industrial growth, the Town of Renfrew has been experiencing very positive industrial growth since the 2006 extension of Highway 417 to Arnprior. The following provides some specific examples of the Town's industrial growth:

1. After a devastating fire at Deslaurier Custom Cabinets, there was a need to re-build completely and the need to make a critical decision about where to rebuild the factory and design offices. The owners decided to continue to operate in Renfrew, rather than move the operation to their major market in Ottawa.
2. Creation of a new 40,000 square foot logistics centre for Raytheon Canada in the Renfrew Innovation Centre.
3. Expansion and upgrade of manufacturing and design facilities for Ottawa Valley Glass and Nova Pole Industries Inc.

6.1 Industrial Impact Observations

The County of Renfrew's existing industrial base would not only benefit from improved shipping options resulting from an extended Highway 417 but generally speaking, the extension of Highway 417 would enable more commercial/industrial opportunities along the transportation corridor and provide a more efficient and safer means for commuting. The extension of Highway 417 would position the County of Renfrew to take the next steps towards achieving its vision of becoming a viable, sustainable and attractive community for residents and industries.

In order for the County to achieve its vision to build on its strengths and capitalize on investment opportunities, it is absolutely necessary to address the need for a safe and efficient highway transportation network. The current two-lane Highway 17 coupled with the recent removal of both CN and CP railways in the County of Renfrew severely limits the ability of the County to retain and attract sustainable growth. If the current transportation

situation remains, the County of Renfrew will continue to lag behind other communities in the province that enjoy the benefits of major four-lane highways.

In terms of vehicular traffic, the Ontario Ministry of Transportation has compiled a variety of statistics based on the blending of 2006 and available 2012 Commercial Vehicle Survey (CVS) data. The Ministry’s data, as demonstrated in the chart below (Figure 9), indicates that more than 1,300 trucks currently travel along the Highway 17 corridor on a daily basis and this volume is projected to increase almost 44% to 1,800 trucks per day by the year 2026. This represents a significant increase in future commercial truck traffic along the Highway 17 corridor.

If the Highway 17 corridor through the County of Renfrew is not expanded to a restricted access multi-lane highway, the projected increase in commercial truck traffic may further exacerbate the transportation issues currently being experienced in the County.

Figure 9: Highway 17 Traffic Data – 2010 and 2012

Highway 17 Traffic Data

May 25, 2015

Location Description	Section Length	2010 Traffic (AADT & Trucks)			2012 Traffic (AADT & Trucks)					
		2010 AADT (Average Annual Daily Traffic)	2010 EST Trucks (%)	2010 EST Trucks (VPD)	2012 EST AADT (Average Annual Daily Traffic)	2012 Spring Observed Trucks (%)	2012 Summer Observed Trucks (%)	2012 Fall Observed Trucks (%)	2012 Avg. EST Trucks (%)	2012 Avg. EST Trucks (VPD)
Herrick Drive (County Boundary)	2.6	14,400	12.5	1,800	14,689			9.8	10	1,440
County Road 2 - (White Lake Road)	11.1	13,300	13.0	1,729	13,567	11.1	16.4	12.6	13	1,813
County Road 508 - (Calabogie Road)	2.1	12,500	12.5	1,563	12,751					
County Road 63 - (Anderson Road/Miller Road)	10.8	12,500	9.2	1,150	12,751					
Highway 60 - O'Brien Road	7.2	11,000	8.9	979	11,221					
County Road 4 - (Storyland Road)	7.2	8,500	14.1	1,199	8,671	14.1	20.8	16.6	17	1,488
County Road 653 - (Chenau Road)	2.1	8,400	16.4	1,378	8,569					
Haley Road	8.6	8,650	17.2	1,488	8,824					
County Road 7 - (Foresters Falls Road)	1.3	9,050	12.6	1,140	9,232					
County Road 8 - (Main Street)	12.0	8,100	13.9	1,126	8,263	11.2	14.1	16.4	14	1,149
County Road 13 - (Mountain Road)	4.6	8,150	18.5	1,508	8,314	13.1	18.7	17.1	16	1,355
County Road 40 - (Greenwood Road)	5.6	6,300	12.2	769	6,427					
County Road 24 - (Whitewater Road)	5.5	6,300	12.2	769	6,427					
Highway 41 - Olympic Drive	5.8	7,750	12.9	1,000	7,906					
County Road 58 - (Round Lake Road)	4.3	7,300	14.3	1,044	7,447	14.1			14	1,050
County Road 42 - (Forest Lea Road)	3.0	7,950	15.9	1,264	8,110	18.5		19.6	19	1,545
County Road 26 - (Doran Road)	6.6	7,000	11.6	812	7,141					
County Road 37 - (Murphy Road)	10.6	6,700	5.1	338	6,835					
Former MTO District Boundary (Landry Crossing)	8.4	6,700	13.1	878	6,835					
Chalk River East Limits	0.8	6,700	13.1	878	6,835					
Albert Street - Chalk River	0.4	7,550	7.0	530	7,702					
West Limit of 4 Lanes - Chalk River	0.9	7,550	14.2	1,072	7,702					
Chalk River West Limits	8.4	7,550	14.2	1,072	7,702	19.7		14.8	17	1,329
County Road 73 - (Deep River Road)	3.1	8,150	7.7	628	8,314					
Deep River West Limits	16.1	4,050	11.8	478	4,131					
County Road 635 - (Swisha Road)	15.2	2,800	22.4	626	2,856	19.6			20	560
CPR Subway - Stonecliffe	36.0	2,750	26.7	734	2,805					
CPR Overhead - Deux Rivières	9.7	2,800	24.1	675	2,856					

- Notes: 1. 2010 Traffic Data Supplied by MTO
- 2. 2012 Observed Truck data provided by MTO
- 3. 2010 Estimated Trucks Calculated by County
- 4. 2012 Estimated AADT Calculated by County using 2010 AADT with 1% per year Growth factor
- 5. 2012 Estimated Trucks Calculated by County using 2012 EST AADT

6.2 Community Impact Observations

From the analysis that was undertaken on comparable communities within the vicinity of the County of Renfrew, it can be concluded that there are quantifiable business opportunities and positive community impacts associated with extending a four-lane restricted access highway to a rural community. These include:

1. **An increased population base** which is critical for economic development since this reflects building a strong local labour force.
2. **Promotion of community development.** This is paramount in sustaining investments in social, community and economic development infrastructure.

More specifically, as evidenced in the Town of Arnprior and the Town of Renfrew analyses, the extension of Highway 417 is urgently needed to ensure positive community growth for County of Renfrew communities.

6.3 Expanded 417 - Key to Community and Economic Development Success

People bring life to a community. Without sustained population growth, with a varied demographic makeup (spanning all the various age segments), a community will start to spiral downward in terms of the quality of its built form and the quality of life offered to its residents. Dynamic, livable communities improve overall quality of place, which is a primary deciding factor for businesses looking to relocate or expand in an area. An expanded Highway 417 through the County of Renfrew will encourage sustained population growth and bring more life to the County's municipalities.

Several communities throughout rural Ontario have suffered with severe population decline, youth outmigration or an imbalance of seniors and elderly making up a predominant portion of the communities population. In complete contrast, the extension of the 417 through the County of Renfrew has demonstrated that a more balanced population growth will ensue in the communities directly impacted by the extension. As a result, the extension of the 417 is a main factor to ensuring a well-balanced demographic profile. In turn, sustained and lively communities within the County of Renfrew will be the product of a well-balanced demographic. Investors, employers and members of the workforce look at several factors before they make a decision to either invest or move to an area...the state of the individual community is one of the major deciding factors.

Labour is mobile and, as such, the extension of the 417 through the County, in combination with the County's regional transportation network, allows the County's regional labourshed to extend well beyond its borders. This is due in large part to the ease of movement of people in and throughout the County. An expanded 417 will create that transportation backbone that is required for better mobility within the region of people to and from their places of employment. It will also provide local and regional employers with a larger labourshed from which they can source skilled, unskilled and professional workers.

Employers need a consistent and reliable source of labour. In the future, new and existing businesses within the County of Renfrew will continue to look outside of their local municipal boundaries to fulfill their labour needs. The extension of the 417 will give the County's labour force the ability to move with greater ease throughout the County.

6 Stakeholder Consultations

Evidence provided in the comparative community analyses confirms a pressing need to extend Highway 417 through the County of Renfrew. This conclusion is further reinforced based on a stakeholder consultation process that was undertaken as part of this study.

Consultations were conducted with the County of Renfrew's industrial and business community as well as elected officials and senior County and local municipal staff. The main tools used to collect this qualitative information included:

- Online Surveys
- Interviews
- Industry Focus Groups.

6.1 Online Surveys

Information was collected through online surveys and reveals the observations and firsthand accounts from the County of Renfrew's business, political and community leaders.

The results of the surveys demonstrate that, in order to become a region that can effectively compete against other regions for investment, a four-lane restricted access highway is needed. Again, the online surveys confirmed that there is strong community support to accelerate extension of Highway 417.

The following provides an overview of the responses received from each of the surveyed sectors:

6.1.1 Industrial and Business Sectors

- Good/reliable transportation infrastructure is critical for major industries such as forestry, manufacturing, logistics and tourism.
- Transportation/fuel cost increases are directly related to increases in travel time—Highway 417 is a faster and more effective means of transporting goods/people versus Highway 17.
- A four-lane highway would allow the County of Renfrew the opportunity to compete more effectively/equally with communities along the 401 and 417 east corridors.
- More tourists will be willing to travel this way if they know that there is a safe highway on which to travel.
- During peak tourism seasons the traffic flows are very high and this is sometimes a problem in terms of moving and enticing tourists to the area.
- The ease and speed at which someone can get to the County of Renfrew will make it a more popular destination for day trippers and weekend getaways from Ottawa.
- As Highway 417 opened up to Arnprior, there was an increase in people looking to move to the area as permanent residents – not just seasonal cottagers.

- It will be easier to attract and retain professionals and skilled labour if there is a four-lane highway to provide quick, safe and efficient access into Ottawa and across the County.

6.1.2 Elected Officials, CAO's & EDO's

- Transportation is vital to the County's economic success – the only means of moving people/goods is by road.
- Rail service and infrastructure have been removed from the County of Renfrew. This has created a significant disadvantage for the County with no access to rail for the vital and cost-effective movement of bulk natural resources and manufactured goods, and the future potential to move people – leaving us totally reliant on the highway system.
- Priority is placed on community development as an approach to economic development.
- Need infrastructure to improve economic development opportunities and be competitive with other areas that have direct access to four-lane highways.
- County's main infrastructure is Highway 17/417 – no major airports or rail lines as options to move people/goods.
- Need to attract professionals, skilled workers, and tourists to the County to continue sustained community and economic development growth.
- Allowing quick and safe access into Ottawa and County communities will assist in attracting investment, labour, talent, and tourists.

6.2 Focus Groups

The information provided in this section was collected through a series of very detailed and thorough focus group sessions. The focus group sessions captured input from the County of Renfrew's main industry sectors as well as the County's political and community leaders.

The comments received during these focus group sessions reiterated the need to be able to compete with other regions both in Ontario and outside of the Province. In order to achieve this objective, the County needs a four-lane highway – an extended Highway 417.

The focus group responses are summarized as follows by sector:

6.2.1 Tourism

- Better access to the County means increased tourism traffic from Ottawa markets and beyond.
- Greatly improve event attraction efforts – people will be more willing to come from Ottawa.
- It's about improved time savings and overall perceptions of ease of access, convenience, speed and safety.
- Reduction in travel time will further increase someone's willingness to travel to the County.

- There is capacity to accommodate additional tourist traffic and usage in the County businesses, accommodations, outfitters and attractions.
- It has been estimated by local tourism groups that about 1.7 million travelers per year traverse Highway 17 past the Calabogie turn-off, a primary access point to four season activities.
- Difficult to safely enter, exit and cross Highway 17 at County Road 508.
- Limited signage/visibility for communities not located directly on Highway 17.
- Golf courses in the Ottawa Valley will be hurt if the 417 is not extended – the local market is saturated and golf course operators need to expand into the Ottawa market.
- An extended Highway 417 would put the County of Renfrew on a level playing field when compared to travel times to other areas (i.e. Calabogie Peaks is competing against ski hills in the Province of Quebec and New York State).

6.2.2 Manufacturing & Construction

- In terms of investment attraction, the County of Renfrew cannot compete against other regions served by a four-lane highway.
- No industries or businesses within the County of Renfrew have access to rail service (outside of a private rail line that serves a single business in Arnprior).
- Having on-time deliveries lowers overall cost of doing business. A four-lane highway ensures deliveries are more reliable and reduces risks and business costs.
- It is more efficient to move goods on a four-lane highway.
- Lowering travel times lowers costs.
- An extended Highway 417 will increase the opportunity to attract employees as it will make it easier and safer to commute.
- Without rail service there is an increase in truck traffic as additional trucks are required to move goods previously transported by rail. The elimination of rail will increase safety issues on Highway 17 – due to the increased truck traffic.
- With the stopping and starting on Highway 17 at the many required light controlled interchanges, there is increased wear and tear on commercial vehicles.
- Increases the ability to attract and retain local labor force.

6.2.3 Elected Officials & Senior Staff

- Major employers are having difficulty attracting professionals due to perceptions surrounding Highway 17 safety concerns.
- The County does not have rail service and now relies wholly on the highway system to move people and goods.
- The County is prepared in terms of investment attraction and has been working hard to develop their strategic planning framework (i.e. County Strategic Plan, County Economic Development Strategy, Cultural Asset Mapping and Cultural Planning).
- The County is at a significant disadvantage and forced to attract investment without a basic economic development asset – a four-lane highway.

- The continued extension of Highway 417 is a logical strategic investment – the Province has already invested heavily in the Eastern Ontario Broadband Initiative and is already investing in the County’s road network and infrastructure.
- The County of Renfrew is looking for parity with other communities across Ontario.
- County industries, federal institutions, Ontario nuclear power producing plants, medical products companies and security products companies are transporting radioactive material in and out of the County. There is a demand for an effective, efficient, fast and safe transportation thoroughfare. An extended Highway 417 is required.
- Communities all along the Highway 17 corridor are ready to approve/release/develop both residential and commercial/industrial lands once the Highway 417 extension is completed.

6.3 Observations from Focus Group Sessions

The feedback provided by the County of Renfrew’s business and industry leaders, as well as the County’s political leaders and administrators confirms the position that Highway 417 urgently needs to be extended through the County of Renfrew as soon as possible in order to ensure that:

1. The County is on a level playing field in terms of transportation assets required to attract investment.
2. There is an effective and efficient means of moving goods and people to, from and through the County. In light of recent decisions to terminate the operation of rail service and removal of its infrastructure within the County, there are no other transportation options other than the Highway 17/417 corridor system.
3. Businesses are able to remain competitive as the extended Highway 417 will provide reduced transportation time and costs.
4. Employers will be able to more readily attract and retain talent (residents) to the County of Renfrew. ***As skilled and professional labour becomes a more sought after commodity, this has become increasingly critical.***
5. The County has the required transportation infrastructure to bring tourists and residents to the area in a quick and safe manner.

7 Rationale for Accelerating the Extension of Highway 417

The data, information and analyses provided in this report demonstrate that, in order to ensure continued community and economic sustainability and prosperity within the County of Renfrew, there is an urgent need to continue to accelerate the extension of Highway 417.

Based on the thorough analyses provided by this business case, the County asserts that the continued commitment by the Province to extend Highway 417 within the County of Renfrew will achieve the following positive results:

7.1 Promote Economic Growth

- **Will increase the County's ability to attract and retain talent, people and employees** – this is a vital component of a strong, stable and sustainable economy.
- **Will provide reliable and safe transportation infrastructure for the County of Renfrew's major industrial sectors** such as advanced manufacturing, agri-businesses, creative industries, forestry and wood processing, green economy and energy, life sciences, mining and tourism.
- **Will reduce travel time which is directly related to transportation and fuel cost reductions.**
- **Will strengthen the County of Renfrew's competitive position** in relation to communities along the Highways 401, 416 and 417 east corridors. This will allow the County to compete favorably province-wide for critical investment opportunities.
- **Will continue building on the positive momentum generated by the extension of Highway 417 west of the Town of Arnprior and continue building on the positive momentum created by the Province through its major investment in the Eastern Ontario Broadband Initiative.**
- **Immediate investment by the Province to accelerate the continued extension of Highway 417 represents the next logical step in supporting economic development initiatives within the County of Renfrew.**

7.2 Enhance Tourism

- **More tourists will be willing, confident and motivated to travel to the County of Renfrew**, knowing that they can travel on a four-lane highway.
- **Traffic flows will not be interrupted due to congestion during peak tourism season.** This will allow for ease of movement of tourists into the area and increase overall tourist visits.

- **Will create a transportation backbone allowing greater access to the many tourist attractions in the County of Renfrew including Algonquin Park.**
- **Improved access to the County of Renfrew will increase the popularity of day trips and weekend getaways from Ottawa and beyond.**
- **Will provide better access for motor coach tour buses thereby increasing tourism activity.**
- **Will reduce travel times and will result in increased tourism satisfaction, activity, returns and positive references to others.**
- **Will provide better access for large recreational vehicles and vehicles towing travel trailers, watercraft, snowmobiles and/or ATVs.**

7.3 Sustain Communities

- Many rural Ontario communities are facing population decreases – comparable examples show that a **four-lane highway will stimulate and maintain population growth.**
- Population growth **will stimulate growth in other sectors such as retail, personal service, health care, education, culture and a wide range of small businesses and services.**
- Housing development is a major component of a community's local economy – **an extended Highway 417 will promote housing development.**

7.4 Enhance Safety

- Real or perceived, Highway 17 safety issues are creating a negative image and greatly impacting the County of Renfrew's economic development potential. **An extension of Highway 417 will alleviate perceptions related to safety concerns.**
- Delivering Canada's stockpile of highly enriched/military grade uranium waste to the United States will be accomplished using trucking convoys through the County of Renfrew for years to come. **An extension of Highway 417 will provide a safer means of transporting radioactive material, other hazardous goods, chemicals, fuels and sensitive goods.**

7.5 Improved Traffic Flows

- As **there are no other alternatives**, people/goods are moved in, out and around the County via Highway 17. **An extended Highway 417 will allow for more efficient and effective means of moving people/goods. This will save time and money.**
- An extended Highway 417 will provide better access for motor coach tour buses. **An extended Highway 417 will increase tourism visits.**
- There is radio-active material being moved along the Highway 17/417 corridor on an almost daily basis. **An extension of Highway 417 will create a safe, accessible and efficient corridor since this material is being moved by truck.**
- **The constant military traffic associated with Garrison Petawawa will be better accommodated by the extension of Highway 417. This will enhance the safety of all other highway users.**

8 Moving Forward

With the completion of this business case, the County of Renfrew has provided the rationale, data, information and analysis to demonstrate there is an urgent need to accelerate the continued extension of Highway 417. The County acknowledges the construction of the Highway 417 extension is now proceeding from Campbell Drive to Scheel Drive and is to be completed in 2016.

As such, based on the data, research, findings and conclusions of this business case, the County of Renfrew would respectfully request that the Province:

- 1. Include the continued extension of Highway 417 as a key priority program within the province's five-year capital works program.**
- 2. Allocate funding for the continued extension of Highway 417 from Scheel Drive to the Town of Renfrew moving forward with the tender process for detailed design and construction (design-build tender) in its five-year capital programs with a goal of completion of the project in the next ten years.**
- 3. For the TransCanada Highway, the main access and supply route to Garrison Petawawa and the Canadian Nuclear Laboratories Inc., it is absolutely critical that the Minister of Transportation develop a predictable multi-year program to fund the planning and implementation of Route Planning Studies, Environmental Assessment updates, property acquisition and budget allocations for the continued extension of Highway 417 through the County of Renfrew.**

9 Appendix 1 - Letter of Support



UNRESTRICTED

2013 July 26

Alastair Baird
Manager, County of Renfrew Economic Development
County of Renfrew
9 International Drive
Pembroke, ON. K8A 6W5

Dear Mr. Baird:

I'm writing with regards to your engagement with the Ministry of Transportation concerning the expansion of Highway 17. On behalf of AECL, I would like to throw my full support behind this initiative. I believe this work directly benefits the health and safety of AECL employees and offers important economic benefits to our organization and the region.

Safety is a top priority at AECL. Our approach to employee safety extends beyond the workplace, and AECL regularly promotes the importance of safe driving practices during and outside of work. As part of this commitment to our staff, we ensure that our roads are safe and well maintained, and that our employees respect the highest safety standards while on site.

Highway 17 provides our staff with access to AECL's largest site - the Chalk River Laboratories. Approximately 2,900 employees travel Highway 17 daily to and from work at all hours of the day. The recent statistics on road incidents and accidents on Highway 17 are an enormous concern for AECL. Sadly, we have lost AECL colleagues and friends to fatal accidents over the years on Highway 17, with the majority of these fatalities having occurred during their commute to work. This is unacceptable. AECL is highly supportive of any initiative that will improve road safety on Highway 17 and further protect our employees and their friends and family.

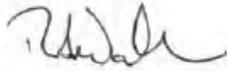
From an economic standpoint, an expanded highway would also create a much stronger connection between Renfrew County and the National Capital Region. Local businesses, including AECL, will benefit from a more reliable shipping route, better access to local suppliers and improved economic opportunities in Ottawa. We also know that more employees are commuting to Chalk River from further distances, and a new highway would no doubt attract employees from a broader area.

Chalk River, ON
Canada K0J 1J0
(613) 584-8282
Tel.: (613) 584-3311

Chalk River (Ontario)
Canada K0J 1J0
(613) 584-8282
Tél.: (613) 584-3311

As the second largest employer in Renfrew County and a major economic driver of the local community, we recognize the value of an expanded Highway 17 and what it means to our employees, business and local community. It is time to embrace all the possibilities that a world class highway can deliver.

Sincerely,



R.S. Walker, PhD, FCAE
President & Chief Executive Officer

10 Appendix 2 - Letter of Support



National Défense
Defence nationale

4th Canadian Division Support Group

Groupe de soutien de la 4^e Division du Canada

Garrison Petawawa
P.O. Box 9999 Stn Main
Petawawa, Ontario K8H 2X3

Garrison Petawawa
CP 9999 Succ Main
Petawawa, Ontario K8H 2X3

1200-1 (Comd)

// May 2015

Mr. Steven Boland
Director of Public Works & Engineering
County of Renfrew
9 International Drive
Pembroke, ON K8A 6W5

Re: Four Lane Expansion of Highway 17

Dear Mr. Boland,

Highway 17 is a critical transportation link for military movements, deployments and exercises for Garrison Petawawa. The four lane expansion of Highway 17 would make any movements safer for those military movements, commercial traffic and the general public.

In addition, the growth of both the Town of Petawawa and Garrison Petawawa over time has caused a larger proportion of the community to access/egress Garrison Petawawa via Highway 17 during the morning and afternoon commute adding to an already congested roadway.

Garrison Petawawa supports the Highway 17 expansion.

Sincerely,



M. Gagné
Colonel
Commander