Township of Norwich
Competitive Analysis Report

June 2008

Prepared for:
The Corporation of the Township of Norwich

Prepared by:

HCA™
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1.0 Introduction

Several external factors are making areas of southwestern Ontario increasingly more attractive for new commercial and industrial development. As noted in the Oxford County Economic Strategy (Dec. 2006. p.14), factors such as increased congestion, high land prices, and reduced available land supply have intensified in the Greater Toronto Area (GTA) over the last 10 years and companies are increasingly looking at investment alternatives outside the GTA.

This report provides an overview of the competitive position of the Township of Norwich. This includes an analysis of demographic and operating cost elements which are typically examined as part of a site location exercise. General comparators include population and labour force growth, average personal and household income, and housing prices. Business case specific comparators include tax rates, development charges, utility costs, water rates, etc.

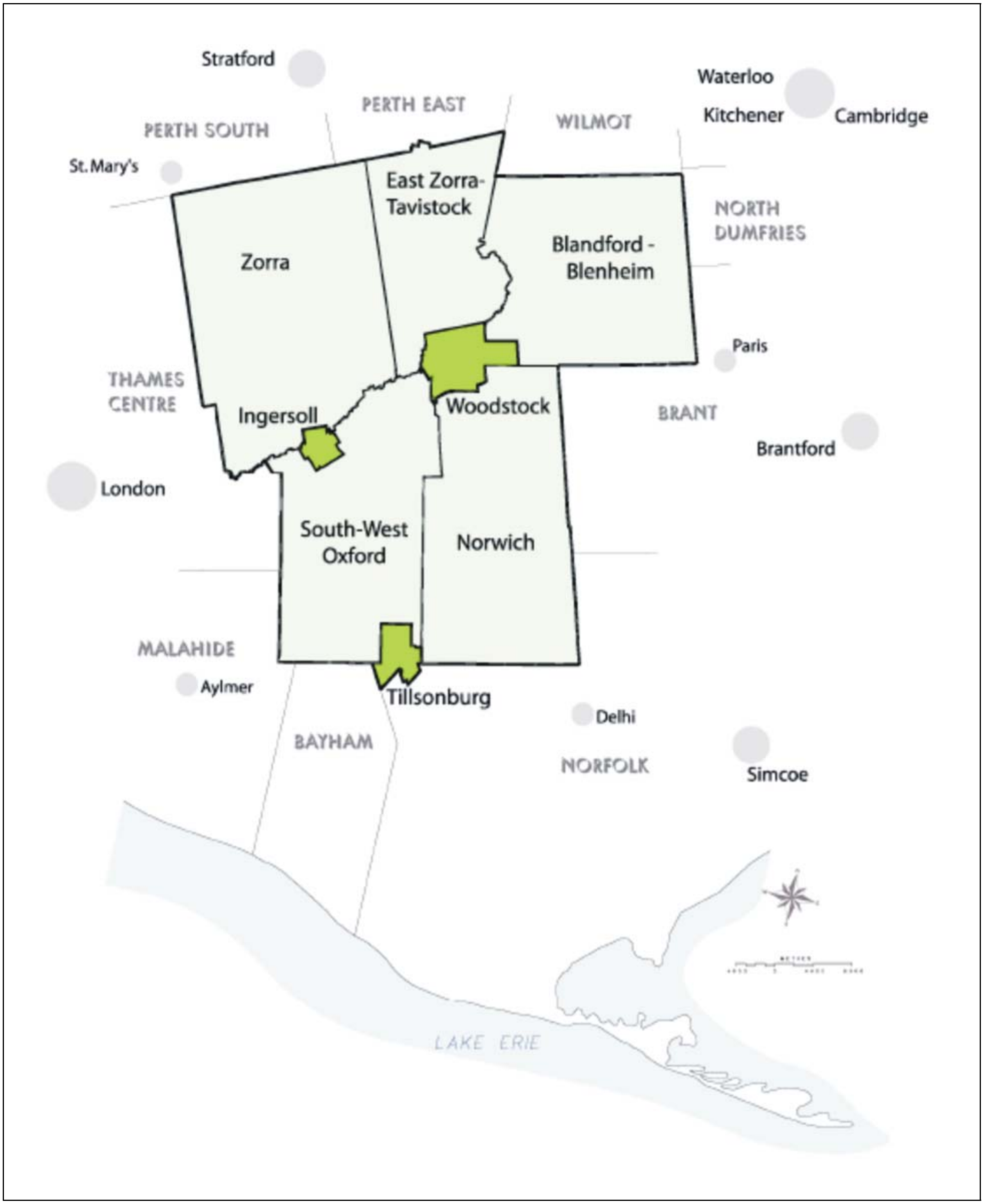
The profile features data from the 1996, 2001 and 2006 Population Census.

The Township of Norwich is part of a two tier municipality. The County of Oxford is the upper-tier municipality while the Township of Norwich along with the other four townships in the county (Zorra, East Zorra-Tavistock, Blandford-Blenheim, and South-West Oxford) and the Towns of Ingersoll and Tillsonburg, and the City of Woodstock are lower-tier municipalities. Municipal responsibilities set out under the Municipal Act and other Provincial legislation are split between the upper tier and lower tier municipalities.[1] Additional details on the spheres of jurisdiction of the County of Oxford upper tier and lower tier municipalities are provided in Appendix A.

For the purpose of this analysis the Township of Norwich is compared to the Towns of Tillsonburg, Ingersoll and Delhi (where data is available). All three of the comparison communities are within 30km driving distance from the centre of the Township of Norwich (Map 1) and all three have populations under 15,000.

[1] In contrast the Town of Delhi is part of the single-tier municipality of Norfolk County. Norfolk County assumes all municipal responsibilities set out under the Municipal Act and other Provincial legislation.

Map 1: County of Oxford and Municipalities

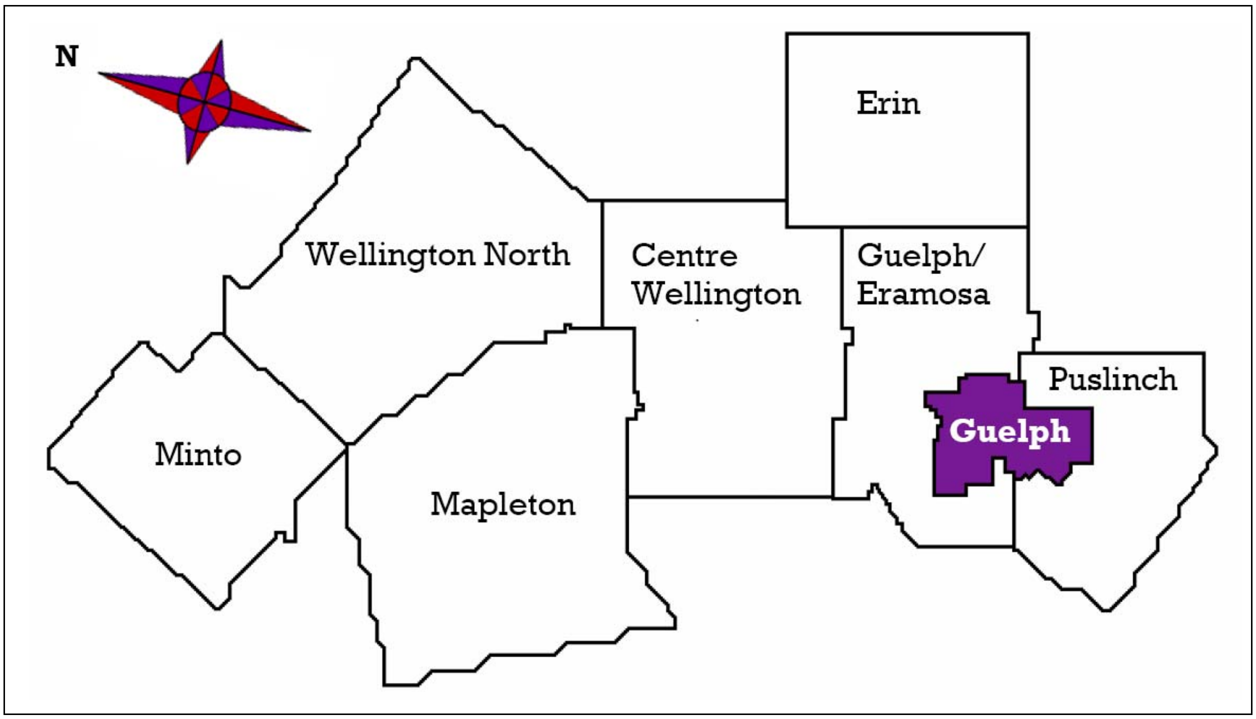


Source: County of Oxford Official Plan. 2005.

The Township of Norwich is also compared to the Township of Guelph/Eramosa which is a lower-tier municipality located in the County of Wellington (Map 2). The Township of Guelph/Eramosa reported a population of 12,000 in 2006 which is slightly larger than the population reported in the Township of Norwich (10,500).[2] Approximately 64% of the population in the Township of Guelph/Eramosa is rural based compared to 76% for the Township of Norwich (Statistics Canada, 2001).[3]

Guelph/Eramosa features a number of characteristics that are similar to the Township of Norwich including proximity to a large urban centre (Guelph) that has significant economic linkages to the auto industry.[4] A total of three highways pass through the Township of Guelph/Eramosa (#6, #7, and #24) and Highway 401 is about 15 minutes from the Township. The Township of Guelph Eramosa is also in close proximity to CNR and CPR rail services (via freight and passenger terminals located in the City of Guelph), several airports (Toronto International Airport, Hamilton International Airport, and the Region of Waterloo International Airport), and port facilities (the Port of Hamilton is about 50kms from the Township).

Map 2: County of Wellington and Municipalities



Source: Guelph Community Profile. City of Guelph. 2007

[2] The principal communities in the Township of Guelph/Eramosa include Rockwood, Eden Mills, Ariss, and Everton. The Town of Rockwood is the largest community in the Township with a population of approximately 3,500. Rockwood is the only fully serviced community in the Township.
[3] An urban area has a minimum population concentration of 1,000 persons and a population density of at least 400 persons per square kilometre, based on the current census population count. All territory outside urban areas is classified as rural.
[4] In 2006 the City of Guelph reported a total population of 114,000. Linamar Corporation is based out of Guelph where it produces motor vehicle parts and accessories and employs approximately 6,500.

The Township of Guelph/Eramosa is in close proximity to several post-secondary institutions including the University of Guelph, University of Waterloo, Wilfrid Laurier University, and Conestoga College. There are also two elementary schools located in the Township of Guelph/Eramosa.[5]

Another characteristic that the Townships of Norwich and Guelph/Eramosa hold in common is their strong local agricultural sectors (Table 1).

Table 1: Agriculture Profile for the Townships of Norwich and Guelph/Eramosa – 2006

	Township of Norwich	Township of Guelph/Eramosa
Total number of farms	494	293
Total area of farmland (acres)	91,059	62,742
Average farm size (acres)	184	214
Total gross farm receipts (2000)	$127,737,205	$47,351,745
Sales of forest products (2000)	$33,829	$48,300
Average revenue per farm (2000)	$258,645	$161,775
Average revenue per acre (2000)	$1,403	$755

Source: Statistics Canada. 2006.

This report represents 1 of 3 companion research studies that were completed by Harry Cummings and Associates Inc. to inform the Township of Norwich Economic Development Strategic planning process:

1. Economic Baseline Report
2. SWOT Analysis
3. Competitive Analysis

An overview of the key findings of the three studies along with recommendations is presented in Chapters 4 and 5 of this report.

[5] **Eramosa P.S.** is a small rural school (est. 1965), located just north of the Town of Rockwood. A total of 148 students are enrolled in junior kindergarten to grade 6. All students are bussed to Eramosa P.S. Grade six students, upon completion of their studies at Eramosa P.S. move onto either Rockwood Centennial P.S. in Rockwood, or to J.D. Hogarth P.S. in Fergus (Upper Grand District School Board. Sept. 2007).
Rockwood Centennial P.S. (est. 1967) is located in the Town of Rockwood. A total of 630 students are enrolled in kindergarten to grade 8. Students attending Rockwood Centennial come from Rockwood, Eden Mills, Everton, and other areas of Guelph/Eramosa. Approximately 400 of its students are bussed to school. Graduating students move on to attend John F. Ross or College Heights in Guelph (Upper Grand District School Board. Sept. 2007).

2.0 General Comparators

2.1 Population Growth

Between 1996 and 2006 the population for Oxford County increased by 6% from 97,140 to 102,756 with almost all of the growth occurring in the three largest urban areas in the County: Woodstock, Tillsonburg and Ingersoll. Woodstock alone accounted for about 60% of this growth.

During the same period the population of the Township of Norwich declined from 10,610 to 10,481 (Table 2). This represents about a 1% decline in population. Since 2001 however, the total population of the Township of Norwich has remained almost unchanged.

Both Tillsonburg and Ingersoll experienced significant increases in population that approached or exceeded the provincial growth rate of 13%. Between 1996 and 2006 the population in Tillsonburg increased by 12% while the population in Ingersoll increased by just over 19%.[6] During the same period the Township of Guelph/Eramosa also experienced impressive growth with the population increasing from 10,176 to 12,066 or almost 19%.

Table 2: Population Change 1996 to 2006

	1996	2001	2006	% change 1996 to 2006	Annual Growth Rate '96-'06
Ontario	10,753,575	11,410,045	12,160,282	13.1%	1.24%
Oxford County	97,140	99,270	102,756	5.8%	0.56%
Township of Norwich	10,610	10,480	10,481	-1.2%	-0.12%
Tillsonburg	13,210	14,050	14,822	12.2%	1.16%
Ingersoll	9,850	10,980	11,760	19.4%	1.79%
Township of Guelph/Eramosa	10,176	11,174	12,066	18.6%	-

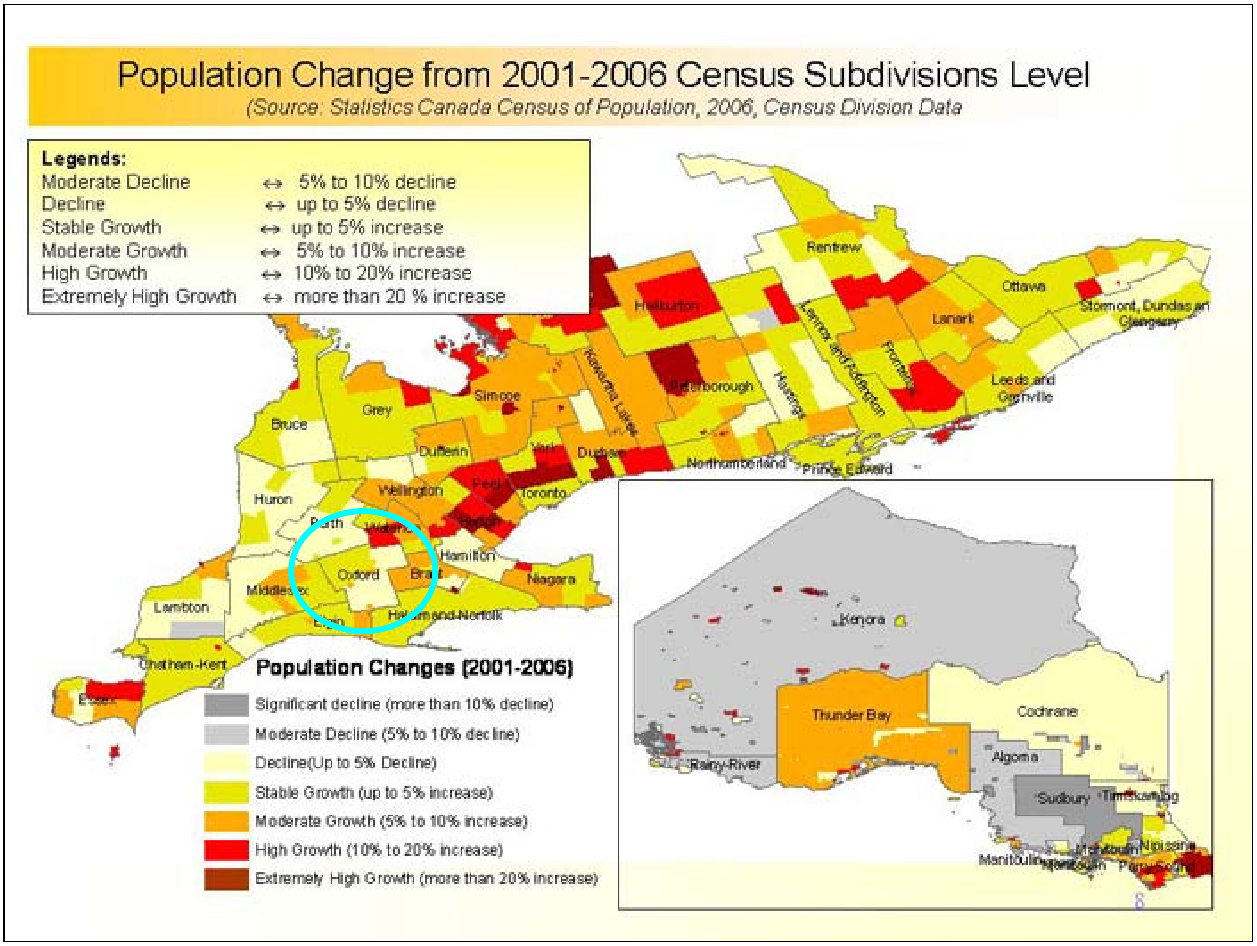
Source: Statistics Canada. 1996, 2001, 2006.

[6] Additional details on the current population profile for these communities are presented in the Township of Norwich Economic Baseline Report. As a result of recent municipal restructuring, Statistics Canada has aggregated all data for Norfolk County and the disaggregated Census data for Delhi is no longer available (Harry Cummings and Assoc. 2008).

As shown in Map 3, the Township of Norwich was one of several municipalities in Ontario that experienced a slight population decline between 2001 and 2006. Within Oxford County, the townships of Blandford-Blenheim and South-West Oxford also reported a slight decline in population.

Oxford County is surrounded by several municipalities where the population experienced moderate to high growth including Waterloo and Brant. These regions are within a short commuting distance to the City of Woodstock and represent areas where industries like Toyota will likely draw some of its workforce.

Map 3: Population Change in Ontario, 2001 to 2006



Source: Rural Economic Development Data and Intelligence - Rural Ontario Profiles. Government of Ontario. 2007. www.reddi.gov.on.ca/insight_ruralontarioprofiles.htm

Population projections prepared for Oxford County in 2006 show the population of the Township of Norwich increasing to 11,500 by 2011 and reaching 12,800 and 13,800 by 2021 and 2031 respectively. The projections for Tillsonburg show the population increasing to 16,500 in 2011 and reaching 19,400 and 21,500 by 2021 and 2031 respectively. The projections for Ingersoll show the population increasing to 16,500 in 2011 and reaching 19,400 and 21,500 by 2021 and 2031 respectively (Hemson Consulting Ltd. April 2006).

2.2 Labour Force Growth

Between 2001 and 2006, the labour force in the Township of Norwich increased approximately 3% from 5,555 to 5,705. During the same period the labour force grew by 8% in Ontario, 7% in Oxford County, 10% in Tillsonburg, and 15% in Ingersoll. In the Township of Guelph/Eramosa the labour force grew by 9% from 6,520 in 2001 to 7,095 in 2006.

Those not in the labour force (people who were neither employed nor unemployed) in the Township of Norwich declined by 1% from 2,270 in 2,001 to 2,255 in 2006. During the same period the number not in the labour force grew by 9% in Ontario, 3% in Oxford County, 1% in Tillsonburg, and 12% in Guelph Eramosa. In Ingersoll the number of individuals not in the labour force declined by 1%.

The employment rate (employment to population ratio)[7] in the Township of Norwich remained almost unchanged between 2001 and 2006 at about 68-69%. The employment rate for the Township of Norwich is higher than other areas of Ontario. In 2006, the employment rate for the Township of Norwich was 69% compared to 57% for Tillsonburg, 68% for Ingersoll, and 71% for the Township of Guelph Eramosa. During the same period Oxford County and Ontario reported employment rates of 66% and 63% respectively.[8]

In 2001 the unemployment rate for the Township of Norwich was approximately 5% which was slightly lower than the rates for Ontario (6%), Oxford County (6%), Tillsonburg (6%) and Ingersoll (7%) but slightly higher than the Township of Guelph/Eramosa (4%). By 2006 the unemployment rate for the Township of Norwich declined to 4% while the unemployment rates for Ontario, Oxford County, Tillsonburg and Ingersoll dropped to 5-6%, and the rate for the Township of Guelph/Eramosa remained unchanged at 4%.[9]

Employment projections were prepared for Oxford County in 2006 and included allocations to the local municipalities taking into account historic shares of growth and likely locations of new employment growth. Population and employment in the County has been recently impacted by significant growth in the manufacturing sector including the expansion of the CAMI automotive plant in Ingersoll and the development of the new Toyota automotive assembly plant in Woodstock.[10]

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[7] The Employment to Population Ratio is the percentage of the total population that is actually employed.

[8] The employment data has not been age standardized i.e. it includes both the youngest and oldest working age groups of the workforce.

[9] Additional details on the employment profile for these communities are presented in the Township of Norwich Economic Baseline Report (Harry Cummings and Assoc. 2008).

[10] CAMI Automotive is a joint venture between Suzuki Motor Corp. and General Motors of Canada Ltd. – CAMI currently employs about 2,700. The Toyota plant is expected to open in 2008 and will be a sister plant to Toyota's operation in nearby Cambridge - the total investment in the Woodstock plant will be about $1.1 billion and it will employ approximately 2,000.

The recent investments are indicators that future growth levels may increase substantially, especially in the next 10 years. Woodstock and Ingersoll are projected to accommodate a relatively large share of the new employment growth as a result of their strategic locations on Highway 401 (Hemson Dec. 15, 2006. p. 26).[11]

Other key employment growth considerations based on the forecast include the following:

- Woodstock is projected to accommodate just over 40% of the County's population and employment growth to 2031 based on its role as the largest urban area and major regional centre for the County. Woodstock also has the largest designated supply of employment lands with the potential for additional lands building on the Toyota investment and high level of accessibility provided by Highways 401 and 403.

- Ingersoll is expected to experience relatively high rates of employment growth due to its strategic location on Highway 401. Ingersoll is expected to have a higher employment rate relative to other communities in Oxford County since it has a relatively small population base and a major employer based in the community (CAMI).

- Tillsonburg is expected to benefit from employment spin-offs linked to the auto parts industry and continued industrial development from other industries building on its existing industrial base. Total employment in Tillsonburg is forecast to grow by almost 50% between 2001 and 2031. Tillsonburg will also continue to attract retirees as migrants both from Oxford County and from neighbouring Norfolk and Elgin Counties.

- Employment growth is forecast for the rural townships in Oxford County including the Township of Norwich. It is anticipated that the growth will be mainly through employment land employment and population related employment growth and also through rural and rural based employment. The Township of Norwich (along with the Township of Zorra) is projected to have the largest population and employment growth. Within the Township of Norwich, the Village of Norwich is the largest serviced village and also has the largest amount of potential available employment land. In the longer term, the Oxford Economic Development Strategy identifies the Highway 403 corridor that runs through the north end of the Township of Norwich as a potential supply of additional employment land (Dec. 15, 2006. p.vii).

[11] Provided that sufficient quality employment and lands are made available in a timely manner.

As noted in the Oxford County Economic Strategy (p.11), the new employment associated with the Toyota and CAMI auto plants may not translate into corresponding increases in population in Oxford County. Given that the jobs in this sector are relatively high paying, employees are typically more willing to commute longer distances than for other jobs. As a result, the population growth effects associated with the development of this sector could be delayed as employees may decide to hold off on moving closer to their workplace until they have become better established in their jobs.

2.3 Housing Prices

A recent review of property listings through the Canadian Real Estate Association MLS website revealed that prices for a standard two storey house (single family, detached, fully serviced, 1,500 sq. ft. or less, 3+ bedrooms) in the Village of Norwich range from $175,000 to $185,000 for older homes and from $200,000 to $210,000+ for newer homes.

Construction is underway or planned for a total of 364 lots in 6 new subdivisions in the Township of Norwich – 3 in the Village of Norwich and 1 each in the Village of Otterville and the Hamlets of Burgessville and Springford.

In the Village of Norwich a total of 320 lots are planned:

- ***Norwich on the Pines*** consists of 132 single family lots[12]
- ***Norwich Oxford Meadows*** consists of 112 single family lots
- ***Norwich Heights*** consists of 76 lots

A total of 19 lots are planned for Burgessville, 16 lots for Otterville, and 9 lots for Springford (Norwich Gazette. Aug. 23, 2006).

The Royal LePage Survey of Canadian House Prices (3rd Quarter 2007) was reviewed to determine how house prices in the Village of Norwich compared to Tillsonburg, Brantford, London, Kitchener and Simcoe.[13] As shown in Table 3 and Figure 1, Tillsonburg has the lowest average price ($188,000) for a standard two storey house compared to the other communities which range from $190,000 in Simcoe to $243,000 in Kitchener. This suggests that standard 2 storey house prices in the Village of Norwich are fairly comparable to Tillsonburg and Simcoe and fairly competitive in relation to the other communities.

Table 3: Average House Prices for Selected Communities (July – Sept. 2007)

Location	Detached Bungalow	Executive Detached Two Storey	Standard Two Storey	Standard Townhouse
Tillsonburg	$175,000	$325,000	$188,000	$162,500
Brantford	$215,000	$341,000	$218,000	$139,000
London	$219,300	$286,200	$225,400	$140,556
Kitchener	$229,900	$355,100	$243,500	$201,300
Simcoe	$165,000	$280,000	$190,000	$140,000

Source: Survey of Canadian House Prices – 3rd Quarter 2007. No. 41. Royal LePage.

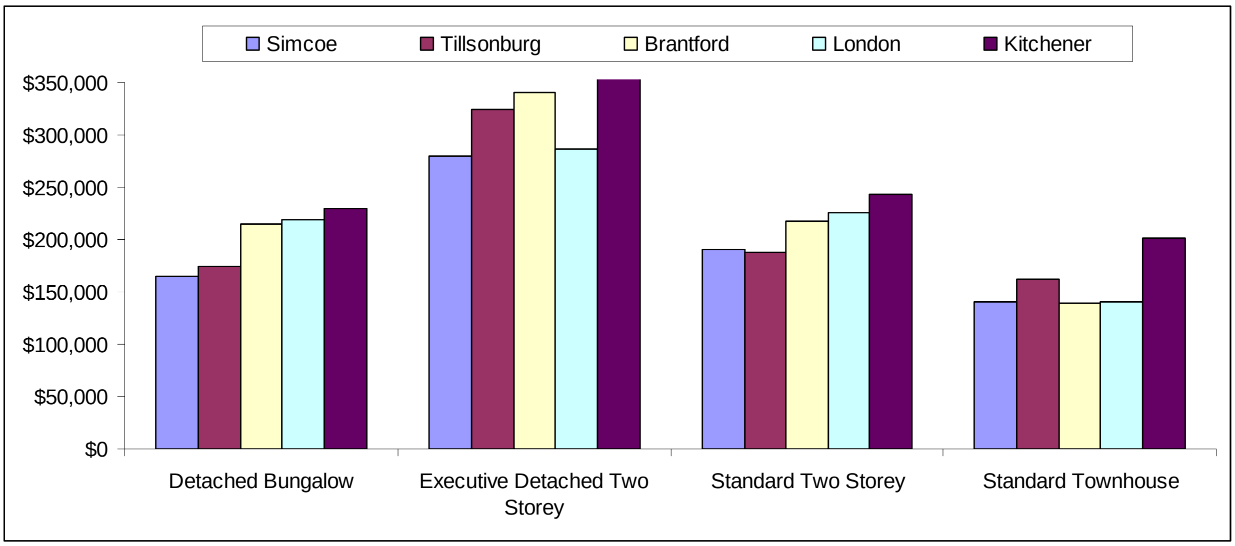
[12] Several house models are being offered at *Norwich on the Pines* including 1,286 square foot models starting at $195,990 as well as models that extend up to 2,880 square feet which start at $359,990 (Norwich Gazette. May 17, 2006).

[13] Specific data for the Townships of Norwich and Guelph/Eramosa, and the Towns of Ingersoll and Delhi is not unavailable in the Survey of Canadian House Prices – 3rd Quarter 2007. No. 41. Royal LePage.

With respect to the average price for a detached bungalow, the price in Tillsonburg ($175,000) was also lower compared to prices in Brantford, London and Kitchener but slightly higher than the average price in Simcoe ($165,000).

However, the average price for an executive detached two storey house in Tillsonburg ($325,000) is more expensive than houses in both Simcoe and London while the average price for a standard townhouse in Tillsonburg is more expensive than townhouses in Brantford, Simcoe, and London.

Figure 1: Average House Prices for Selected Communities (July – Sept. 2007)



Source: Survey of Canadian House Prices – 3rd Quarter 2007. No. 41. Royal LePage.

Detached Bungalow: A detached, three-bedroom single storey home with 1 1/2 bathrooms and a one-car garage. It has a full basement but no recreation room, fireplace or appliances. Using outside dimensions (excluding garage), the total area of the house is 111 sq. metres (1,200 sq. ft.) and it is situated on a full-serviced, 511 sq. metre (5,500 sq. ft.) lot. Depending on the area, the construction style may be brick, wood, siding or stucco.

Executive Detached Two-Storey: A detached two-storey, four-bedroom home with 2 1/2 bathrooms, a main floor family room, one fireplace, and an attached two-car garage. There is a full basement but no recreation room or appliances. Using the exterior dimensions (excluding garage), the total area of the house is 186 sq. metres (2,000 sq. ft.), and it is situated on a full-serviced, 604 sq. metre (6,500 sq. ft.) lot. Depending on the area, the construction style may be brick, wood, aluminum siding, stucco or a combination like brick and siding.

Standard Two-Storey: A three-bedroom, two-storey home with a detached garage. It has a full basement but no recreation room. Using outside dimensions, the total area of the house is 139 sq. metres (1,500 sq. ft.) and it is situated on a full-serviced, city-sized lot of approximately 325 sq. metres (3,500 sq. ft.). The house may be detached or semidetached and construction style may be brick, wood, siding or stucco.

Standard Townhouse: Either condominium or freehold, the townhouse (row house) has three bedrooms, a living room and dining room (possibly combined) and a kitchen. Also included are 1 1/2 bathrooms, standard broadloom, a one-car garage, a full unfinished basement and two appliances. Total inside area is 92 sq. metres (1,000 sq. ft.). Depending on the area, the construction may be brick, wood, siding or stucco.

2.4 Personal Income

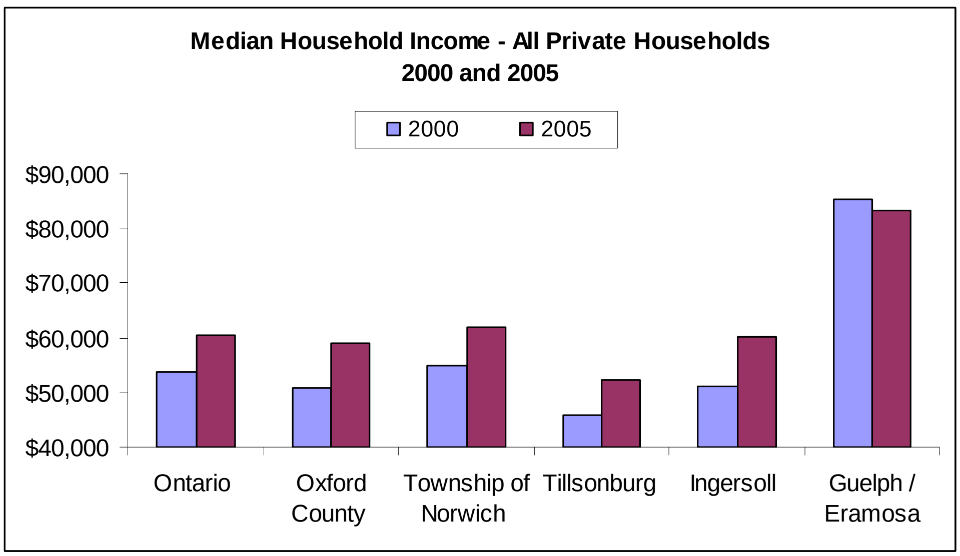
The median personal income in the Township of Norwich in 2005 was $21,928. This is slightly lower than the median personal income values reported for Tillsonburg, Ingersoll, Oxford County, and Ontario as a whole which ranged from $23,000 to $26,000. The median personal income for the Township of Guelph/Eramosa in 2005 was $34,153 or almost 55% higher than the median for the Township of Norwich.

2.5 Household Income

The median household income in the Township of Norwich in 2005 was $61,810.[14] This is considerably higher than the median household income reported for Tillsonburg ($52,277) and slightly higher than the median income values for Ingersoll ($60,107), Oxford County ($58,870), and Ontario as a whole ($60,455). The median household income for the Township of Guelph/Eramosa in 2005 was $83,414 or almost 35% higher than the average reported in the Township of Norwich.

Figure 2

Between 2001 and 2005, the median household income value increased in the Oxford County area including the Township of Norwich where the median increased by 13%.



[14] The total income of a household is the sum of the total incomes of all members of that household during the calendar year 2000 by persons 15 years of age and over. The household may consist of a family group (census family) with or without other non-family persons, of two or more families sharing a dwelling, of a group of unrelated persons, or of one person living alone. Household members who are temporarily absent on Census Day (e.g. temporary residents elsewhere) are considered as part of their usual household. For census purposes, every person is a member of one and only one household. Unless otherwise specified, all data in household reports are for private households only. Household total income differs from Census Family total income - the total income of a census family is the sum of the total incomes of all members of that family during the calendar year 2000 by persons 15 years of age and over.

The higher median income values reported in the Township of Guleph/Eramosa are linked to the local employment profile. Compared the Township of Norwich, the Township of Guelph/Eramosa has twice the proportion of jobs related to the professional, scientific and technical sector and almost three times the proportion of jobs related to the educational services sector. The Township of Guelph/Eramosa also has three times fewer jobs in the agriculture sector (Table 4).

Table 4: Population by Industrial Sector: Township of Norwich vs. Township of Guelph/Eramosa – 2006 [a]

	Township of Norwich		Township of Guelph/Eramosa	
	# jobs	%	# jobs	%
Agriculture	900	15.9%	340	4.8%
Mining and oil and gas extraction	0	0.0%	25	0.4%
Utilities	20	0.4%	40	0.6%
Construction	420	7.4%	615	8.7%
Manufacturing	1,095	19.4%	1,200	17.0%
Wholesale trade	350	6.2%	465	6.6%
Retail trade	485	8.6%	600	8.5%
Transportation and warehousing	430	7.6%	340	4.8%
Information and cultural industries	35	0.6%	70	1.0%
Finance and insurance	125	2.2%	265	3.7%
Real estate and rental and leasing	45	0.8%	105	1.5%
Professional, scientific and technical services	195	3.4%	455	6.4%
Management of companies and enterprises	10	0.2%	10	0.1%
Administrative and support	170	3.0%	210	3.0%
Educational services	160	2.8%	560	7.9%
Health care and social assistance	440	7.8%	620	8.8%
Arts, entertainment and recreation	90	1.6%	165	2.3%
Accommodation and food services	240	4.2%	250	3.5%
Other services	295	5.2%	430	6.1%
Public administration	150	2.7%	305	4.3%
Total	5,655	100.0%	7,070	100.0%

Source: Statistics Canada. 2006. North American Industrial Classification System.

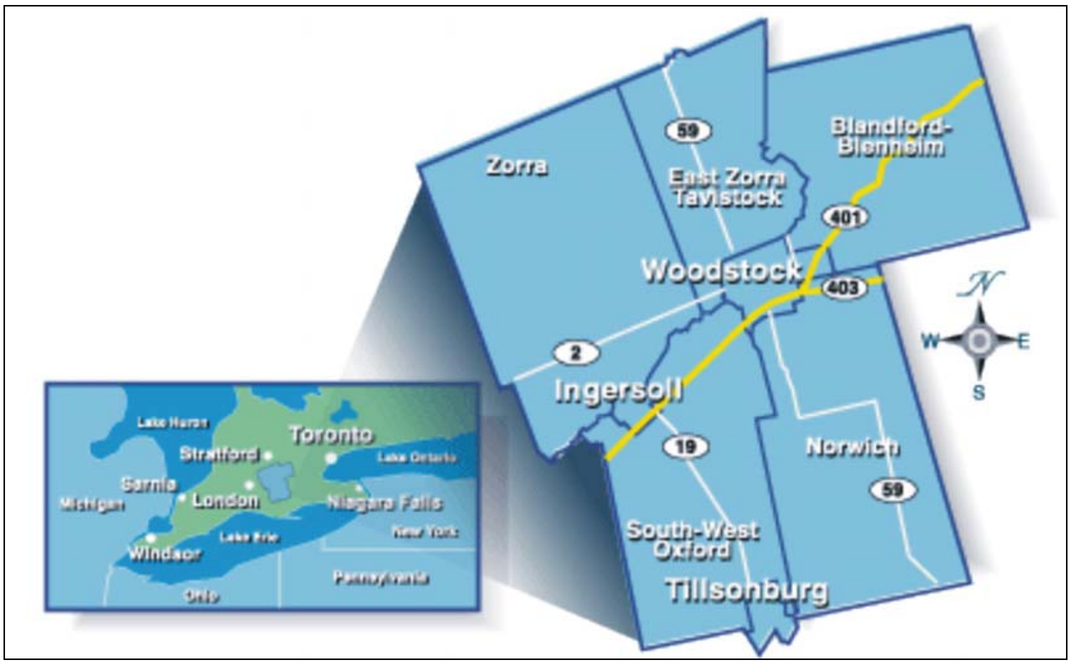
3.0 Business Case Specific Comparators

3.1 Location and Transportation Infrastructure

The Township of Norwich, and the Towns of Tillsonburg, Ingersoll and Delhi are all strategically located in southwestern Ontario with excellent access to 4 major transportation corridors: Highway 401, Highway 403, and the Canadian National and Canadian Pacific Rail freight lines (Woodstock is serviced by both CN and CP and by VIA Rail Passenger service).

Travel time from the Village of Norwich (located about midpoint in the Township of Norwich) to Highway 401 and 403 is less than half an hour traveling along County Road 59.

Map 4: Township of Norwich and Proximity to Highway 401 and 403



Source: County of Oxford - www.county.oxford.on.ca

The importance of highway accessibility is reflected in the results of a recent survey of corporate executives in the U.S. who ranked highway accessibility as the most important site selection factor (Table 5).

With its close proximity to Highways 401 and 403, the Township of Norwich has a strategic advantage over other regions. As corporations deal with the challenge of rising fuel costs there will continue to be strong interest in sites that provide the shortest access to highways as well as markets.

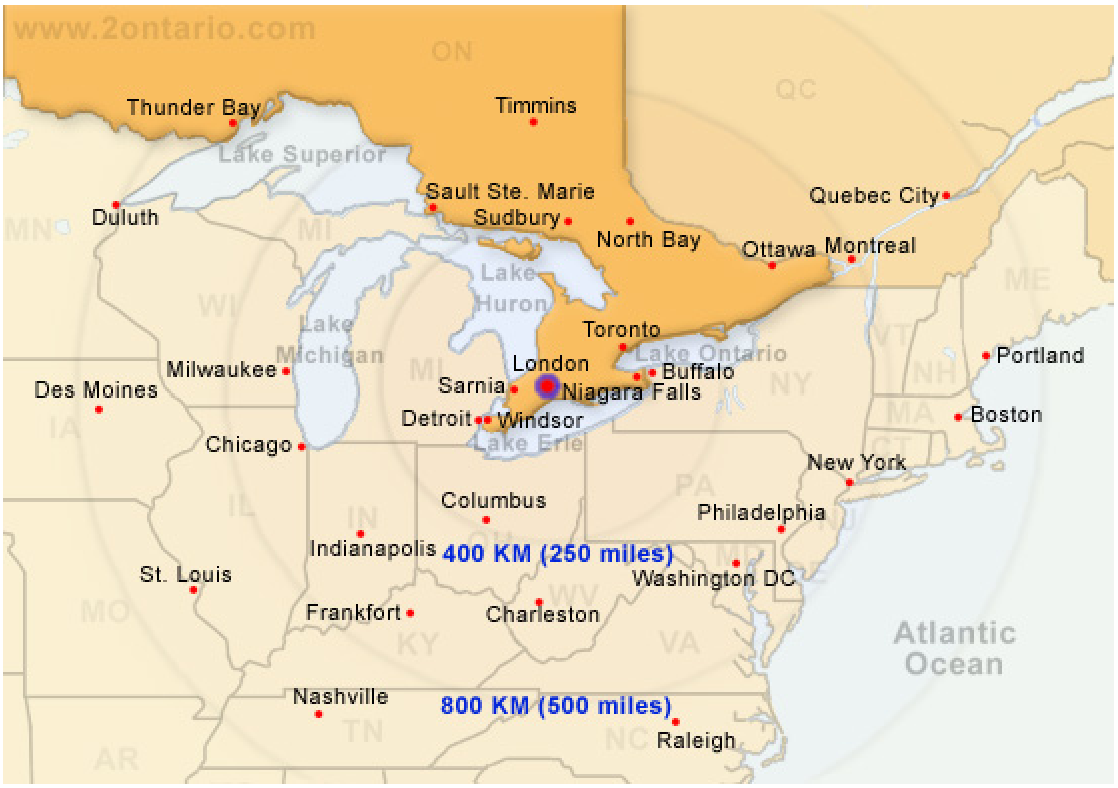
Table 5: Top Ranking Site Selection Factors for U.S. Corporations

Rank	Site Selection Factors [a]	2006 survey (%)	2007 survey (%)
1	Highway accessibility	90.9	96.9
2	Labor costs	95	92.3
3	Energy availability and costs	82.4	89
4	Availability of skilled labor	85.1	88.7
5	Occupancy or construction costs	85.5	88.2
6	Available land	73.3	85.4
7	Corporate tax rate	90.8	83.8
8	State and local incentives	88.6	83.4
9	Environmental regulations	68.9	83.2
10	Tax exemptions	86.7	82.8
10T	Proximity to major markets	76.9	82.8
11	Availability of information and communications technology	N/A	82.2
12	Low union profile	78.4	80.6
13	Availability of buildings	N/A	79.3
14	Right-to-work state	67.1	72.1
15	Proximity to suppliers	49.3	71.8
16	Expedited or “fast-track” permitting	N/A	71.5
17	Availability of unskilled labor	65.3	65.2
18	Availability of long-term financing	64.1	63.0
19	Raw materials availability	64.1	62.5
20	Training programs	56.0	56.6
21	Accessibility to major airport	61.4	54.4
22	Railroad service	20.8	38.1
23	Proximity to technical university	30.0	32.7
24	Waterway or ocean port accessibility	17.0	15.2

[a] Respondents were asked to rate the various site selection factors as either “very important,” “important,” “minor consideration,” or “of no importance.” The figures presented in this table represent the combination of “very important” and “important” ratings.
Source: Area Development. 22nd Annual Corporate Survey. 2007.

Rising fuel costs are also advancing the importance of proximity to the marketplace as a key site selection factor. The Township of Norwich is well situated in this regard. As shown in Map 5, the Township of Norwich is within a 2 hour drive to half of Ontario's population (about 6 million people) and within a 3 hour drive to Canadian/U.S. border crossings to Michigan and New York. In terms of the local consumer base, the Township of Norwich is within a day's drive to 130 million North American consumers and most major manufacturing centres within the American Midwest and Eastern Seaboard.

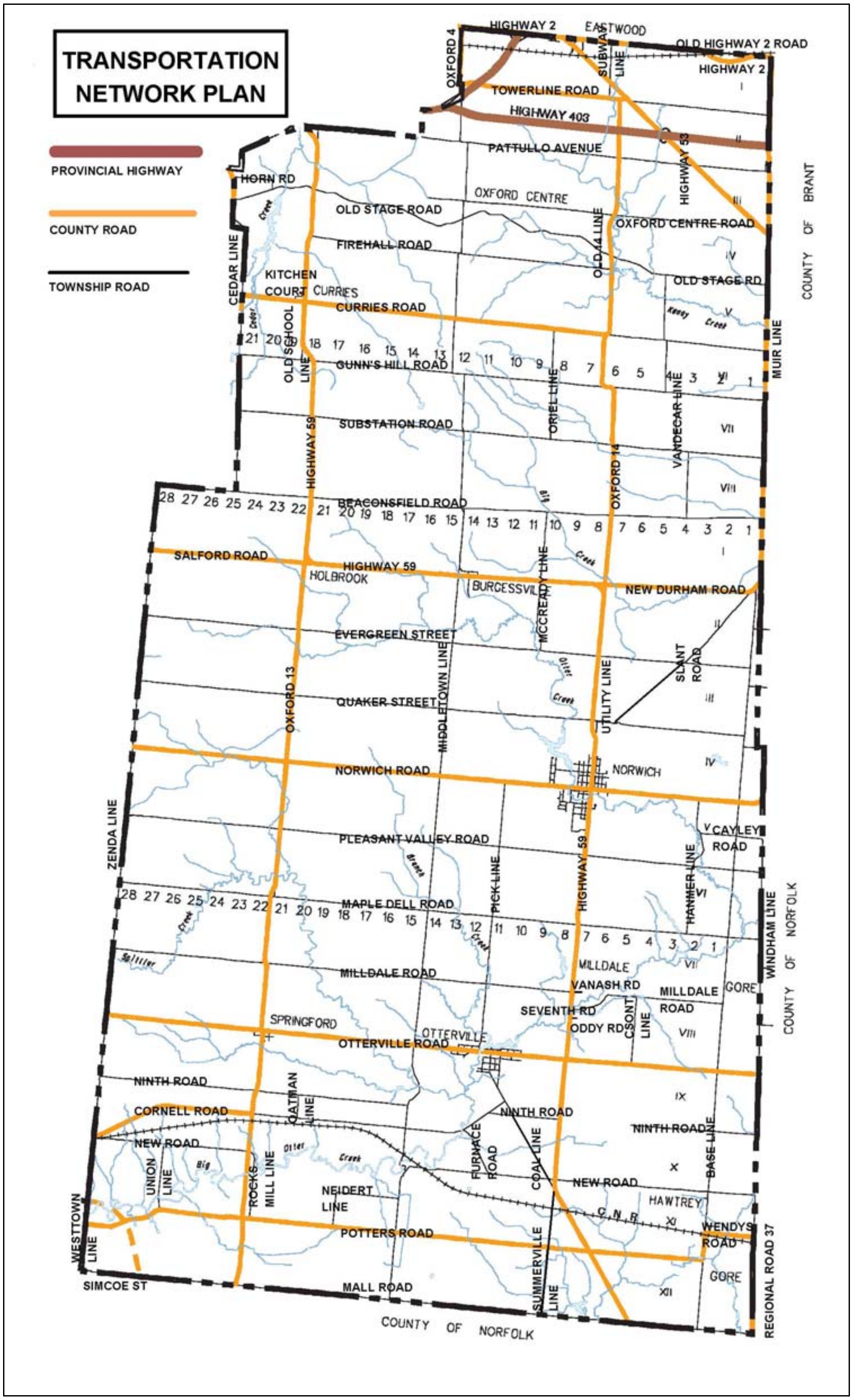
Map 5: Driving Distances from Oxford County – 400km (½ day), 800km (1 day) 1,200km (1.5 days)



Source: Ontario Economic Development – www.2ontario.com/software/large_map.asp?pic=London

In addition to Highways 401 and 403 which cross the northern edge of the Township of Norwich, access to all parts of the Township is facilitated through an extensive network of County and Township roads (Map 6).

Map 6: Township of Norwich Transportation Network



Source: County of Oxford Official Plan. 2005.

With respect to air transport, London International Airport serves the region for both domestic and international small jet and chartered flights and also provides air freight services. There are also several secondary airports in close proximity including Brantford, Stratford and Kitchener.

Map 7: Primary and Secondary Airports in Ontario

Source: Ontario Economic Development – www.2ontario.com/software/large_map.asp?pic=airport2

The nearest access to the St. Lawrence International Seaway is within a 2 hour drive at Port Stanley (the only deep-water port on the north shore of Lake Erie) and Hamilton Harbour on Lake Ontario.

3.2 Education and Skilled Labour

Based on a 2007 survey of 420 Canadian business leaders, *labour* was identified as the leading national challenge that companies expect to face in the next year. In Ontario, business leaders identified *competition* followed by *labour* as the primary challenges in the coming year (Price Waterhouse Coopers, Business Insights Survey 2007. pp.5-7).

The availability of skilled labour has also been identified as a key site selection factor for many businesses. In one U.S study, the availability of skilled labour was ranked as the 4^{th} most important site selection factor after highway accessibility, labour costs, and energy availability and costs (Area Development. 22^{nd} Annual Corporate Survey. 2007).

In the local context, the Southwestern Ontario Marketing Alliance (which includes the County of Oxford in its coverage area) identified a long-existing and continuing shortage of skilled and experienced trades-people, such as machinists, millwrights, and some engineers (as reported in the Oxford County Workforce Plan – The Elgin, Middlesex, Oxford Local Training Board. 2006).

Additional relevant regional workforce trends were identified through consultations conducted by The Elgin, Middlesex, Oxford Local Training Board in 2006. The Trends, Opportunities, Priorities (TOP) Report confirmed five major trends impacting the local workforce and identified key issues for action:

- Workforce Shortages – This reflects the ageing population resulting in skilled trades shortages, health provider shortages and recruitment/retention issues across most sectors.

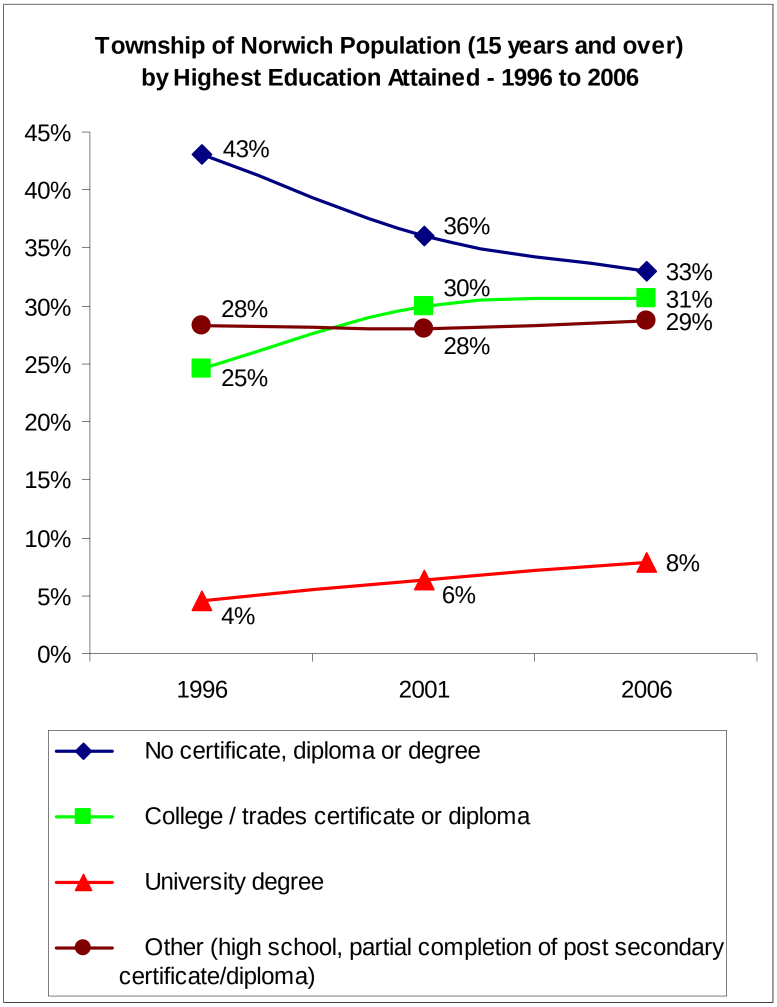
- Higher Skill Requirements – This is seen in an increased need for senior technical and managerial expertise. Literacy issues within the workforce were highlighted, as was the need to build the workforce capacity for technology-driven businesses.

- Workforce Diversity – This addresses the business requirement to expand the opportunities for new immigrants, persons with disabilities, women, older workers and youth in order to meet future local workforce needs.

- Emerging Industries & New Technologies – This identifies the potential for emerging industries to be created. There is a need to identify what the next new large growth industry might be and the skill sets required in those areas that may impact on existing business workforce needs.

- Economic & Employment Diversification - This identifies the requirement within workforce planning to look to future growth industries in the local area. There is a need to identify the skill sets required in those areas and how that growth may impact on local business workforce needs (TOP Report. January 2007. p.4).

Figure 3



A review of Census data between 1996 and 2006 reveals encouraging developments for the local labour force with respect to education and skills development. As shown in Figure 3 and Table 6, the Township of Norwich experienced an increase in the overall level of education of the labour force between 1996 and 2006 as both the number and percentage of college/trade school graduates and university graduates increased.

Table 6: Township of Norwich Population by Highest Education Attained – 1996 to 2001

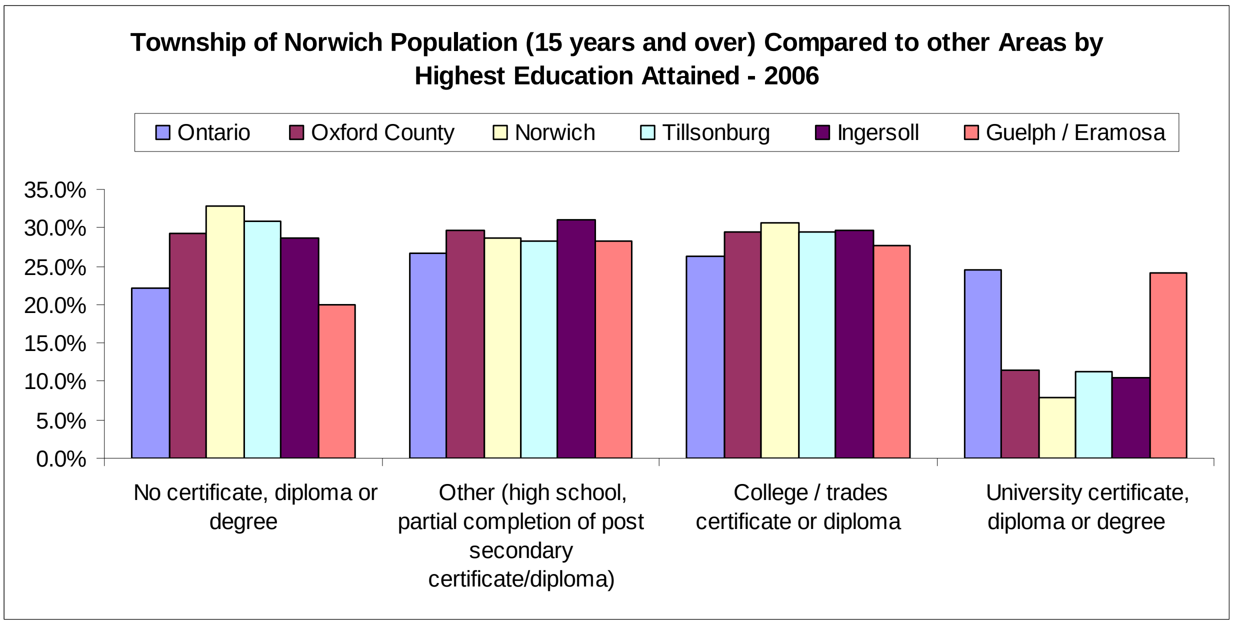
Level of Education	1996		2001		2006	
	#	%	#	%	#	%
No certificate, diploma or degree	3,330	42.7%	2,445	35.7%	2,610	32.8%
Other (high school, partial completion of post secondary certificate/diploma)	2,200	28.2%	1,920	28.0%	2,280	28.7%
College / trades certificate or diploma	1,910	24.5%	2,050	29.9%	2,440	30.7%
University certificate, diploma or degree	350	4.5%	435	6.4%	625	7.9%
Total	7,790	100.0%	6,850	100.0%	7,955	100.0%

Source: Adapted from Statistics Canada. 1996, 2001 and 2006.

The Census data also reveals that the Township of Norwich is performing relatively well compared to the Towns of Tillsonburg and Ingersoll and Oxford County as a whole. The share of College/Trade School graduates in the Township of Norwich (31%) is slightly higher than all of the comparison jurisdictions (Figure 4).

Although, the percentage of University graduates in the Township of Norwich increased between 1996 and 2006, the Township has the lowest total share University graduates (8%) compared to the other jurisdictions (Figure 4). In the Township of Guelph/Eramosa the proportion of University graduates is three times larger than the Township of Norwich.

Figure 4



Of the 2,450 residents of the Township of Norwich who reported having postsecondary school qualifications in 2006, the top 5 postsecondary fields of study were:

- Architecture, engineering, and related technologies (25%)
- Health, parks, recreation and fitness (21%)
- Business, management and public administration (16.5%)
- Agriculture, natural resources and conservation (9%)
- Social and behavioural sciences and law (8%)

The other jurisdictions used in this comparison (Tillsonburg, Ingersoll and Guelph/Eramosa) typically have a higher percentage of residents with postsecondary school qualifications in Business, management and public administration and a lower percentage of residents with postsecondary school qualifications in Agriculture, natural resources and conservation (Table 7).

Table 7: Total Population with Postsecondary Qualifications by Major Field of Study – 2006

	Township of Norwich		Tillsonburg		Ingersoll		Township of Guelph/Eramosa	
	#	%	#	%	#	%	#	%
Total population with postsecondary qualifications by major field of study	2,450	100.0%	3,615	100.0%	3,090	100.0%	4,060	100.0%
Education	105	4.3%	295	8.2%	145	4.7%	255	6.3%
Visual and performing arts, and communications technologies	75	3.1%	90	2.5%	90	2.9%	60	1.5%
Humanities	90	3.7%	170	4.7%	175	5.7%	195	4.8%
Social and behavioural sciences and law	190	7.8%	260	7.2%	275	8.9%	415	10.2%
Business, management and public administration	405	16.5%	735	20.3%	715	23.1%	780	19.2%
Physical and life sciences and technologies	40	1.6%	55	1.5%	60	1.9%	255	6.3%
Mathematics, computer and information sciences	80	3.3%	130	3.6%	115	3.7%	145	3.6%
Architecture, engineering, and related technologies	610	24.9%	805	22.3%	770	24.9%	915	22.5%
Agriculture, natural resources and conservation	215	8.8%	60	1.7%	70	2.3%	305	7.5%
Health, parks, recreation and fitness	505	20.6%	635	17.6%	485	15.7%	565	13.9%
Personal, protective and transportation services	135	5.5%	380	10.5%	190	6.1%	170	4.2%
Other fields of study	0	0.0%	0	0.0%	0	0.0%	0	0.0%

Source: Statistics Canada. 2006.

3.2.1 Local Educational Infrastructure / Resources

The Township of Norwich has a total of four publicly funded schools including a high school and elementary school in the Village of Norwich and elementary schools in Otterville and Burgessville. Total enrolment at these four schools for the 2007/08 school year is about 1,000 students (Table 8).

The publicly funded schools in the Township of Norwich are organized under the Thames Valley District School Board (TVDSB) which is one of the largest public boards in Ontario and serves an area of over 7,000 square kilometres.[15]

Table 8: Public Funded Schools in the Township of Norwich

Name of School	Age of School	Student Enrolment (2007/08)	Number of Staff/Teachers
Norwich District High School	Built in 1952.	278	27
Norwich Public School	Originally built in 1896 and four rooms added in 1957. The original building was replaced by the new addition in 1973. There are currently 2 portables in use.	257	16
Otterville Public School	Founded in 1927 and redesigned newly constructed main school building. There are currently 4 portables in use.	205	10
North Norwich Public School (Burgessville)	Built in 1961.	235	11

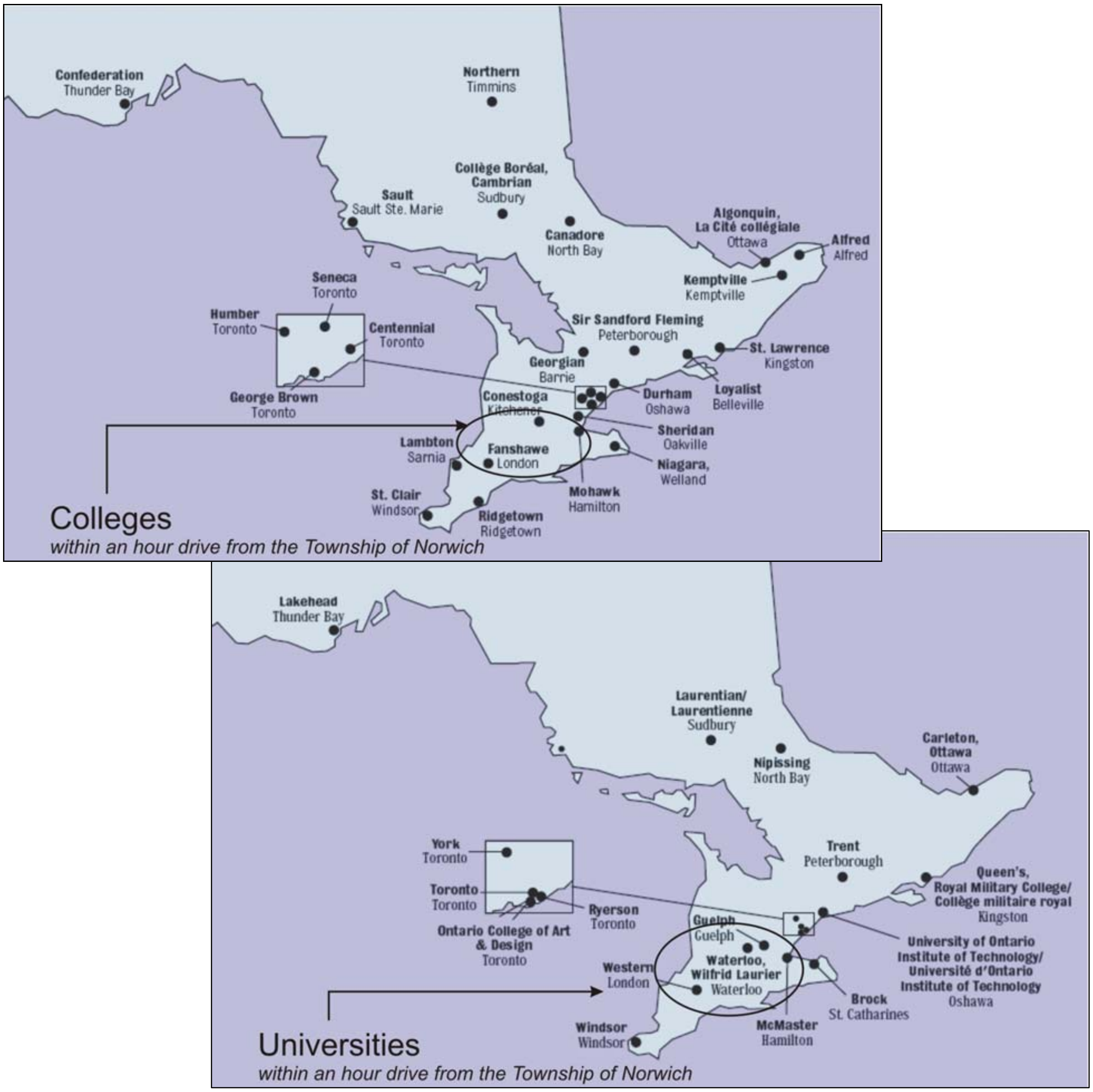
Source: Thames Valley District School Board website - https://apps.tvdsb.on.ca/employees/profile/profile.asp?schoolcode=2240

There is also a private Christian school located in the Village of Norwich (Rehoboth Christian School) which currently offers programming from kindergarten to grade 12 and has about 600 students.

[15] TVDSB was established on January 1, 1998, with the amalgamation of the Elgin County Board of Education, The Board of Education for the City of London, Middlesex County Board of Education and Oxford County Board of Education. TVDSB has a total of 184 schools serving more than 76,000 elementary and secondary school students in urban, suburban and rural communities (TVDSB. www.tvdsb.on.ca/welcome/default.shtml).

Several postsecondary education institutions are located within an hour drive of the Township of Norwich including Colleges in London (Fanshawe), Kitchener (Conestoga), and Hamilton (Mohawk), and Universities in London (Western), Waterloo (Waterloo and Wilfrid Laurier), Guelph (Guelph), and Hamilton (McMaster).

Map 8: Location of Colleges and Universities in Ontario & Proximity to the Township of Norwich



Source: Ontario Ministry of Training, Colleges and Universities, 2007.

3.2.2 Social and Economic Implications of School Closures

Since its peak enrolment in 1999, TVDSB has experienced a loss of over 5,000 students. In response to the decline in enrolment TVDSB conducts an annual review of population trends and where it can consolidate space and programs. Currently a total of 80 schools in the TVDSB area are under review including 25 schools in rural areas (London Free Press, Nov. 29, 2007). Norwich District High School (NDHS) is one of the schools under review.

As part of the review process, TVDSB has established Accommodation Review Committees (ARCs) in different regions of the TVDSB catchment area to assess each of the schools involved in the review on the basis of the school's value to students, the school board, the community and the local economy.[16]

In light of the declining enrolment issue faced by NDHS, consideration is being given to future scenarios/options for NDHS such as maintaining NDHS as it is or closing the high school and busing students to other high schools. Another scenario could see the consolidation of the 3 elementary schools in the Township into the former NDHS building.

A scan of the literature reveals that schools provide rural communities with a variety of social and economic benefits. As noted by Peshkin (1978:161), the capacity to maintain a school is a continuing indicator of a community's well being. Some of the negative effects of a school closure include loss of a central focus for the community pride and solidarity, reluctance of child-bearing potential families to settle in the community, and disruption of students' social contacts and academic learning (Wholeben et al, 1980 – quoted in Dean, 1982).

Lyson's (2002) study of schools in rural areas in the State of New York compared rural areas with schools to those without schools. As noted by Lyson (2002:2), the school serves the broadest constituency of all civic institutions in rural areas. "Not only do schools meet the educational needs of a community and may be a source of employment for village residents, the local school also provides social, cultural, and recreational opportunities."

Lyson's (2002:7) study also found that the physical infrastructure (e.g. municipal water and sewer systems) is more developed in rural communities with schools than in rural communities without schools. Lyson found that the presence of schools in rural communities is associated with appreciably higher housing values compared to rural communities without schools and suggests that rural communities with schools could have a sufficient tax base to support municipal services such as water and sewer systems.

[16] The considerations used to value a school are to be weighted as follows: a. Value to the Student 40%; b. Value to the Board 20%; c. Value to the Community 30%; d. Value to the Local Economy 10% (Accommodation Review Committee Report TVDSB. April 10, 2007)

Lyson (2002:8) also determined that rural communities with schools have proportionally more individuals working in the community they live (28% vs. 16% for rural communities without schools) and more individuals employed in professional/managerial positions (40% vs. 36% for rural communities without schools) which suggests that places with schools are more economically robust than places without schools.

The movement to consolidate small rural schools has been motivated by several factors including economic theories of efficiency and the perception that smaller schools have a limited academic curriculum which places students at an academic disadvantage.

As noted by Lyson (2002:10-11) schools in rural communities "serve as important markers of social and economic viability and vitality" and "the money that might be saved through consolidation could be forfeited in lost taxes, declining property values, and lost business." In one study that examined 19 school district consolidations in 10 US states it was revealed that of 6 expenditure categories (administration, instruction, transportation, operations and maintenance, total costs and capital projects), only administration showed significant savings 3 years after consolidation (Streifel, J.S. et al. 1991). The study concluded that major financial advantages are not a necessary outcome of school consolidation efforts and that economies of scale theories may not accurately reflect school expenditures. This conclusion has been replicated in several studies.[17]

Schools also generate important secondary economic effects in rural communities. These economic effects include the purchasing power of large payrolls, employment opportunities, stimulation of retail trade, recapture of locally collected government taxes, and maintenance of property taxes (Sederberg, 1987. p.125).

The importance of schools to rural communities is recognized in the State of New York where recent legislation requires that a community that loses its school must be compensated for their losses (Lyson. 2002.11). As noted by Fredua-Kwarteng (2005:9) one may conclude from Lyson's findings that when a school closes in a community it contributes to the economic decline of the community.

The important economic function of schools is further illustrated by the results of one study which calculated an employment multiplier of 1.6 for rural schools in Missouri (Sederberg, 1987. p.125).[18] This meant that each rural school job was associated with 0.6 additional jobs in the community; or to put it another way, 10 rural school jobs supported 6 jobs in the wider community (e.g. jobs in the banking sector, retail sector, auto sales/service sector, and other sectors that provide services that a school

[17] For a comprehensive review of studies of economies of scale theory and rural school consolidation, see Tholkes, R.J. and Sederberg, C.H. 1990. "Economies of Scale and Rural Schools." *Research in Rural Education*. V.7. N1. pp.9-15.
[18] A similar economic multiplier (1.55) was estimated for Canadian University College in central Alberta (Ng. P.A. May 2004. The Economic Impact of the Canadian University College on the Town of Lacombe and Region).

employee might utilize). Multipliers can work both ways in response to a positive or negative shock to the local economy. If we generalize the Missouri rural school multiplier and apply it to the potential loss of 27 staff/teachers at NDHS we can estimate that an additional 16 full time jobs could be lost in the local economy.

Beyond the local impacts that a school closure creates, it can also send a signal to prospective investors about the quality of life in the area. As shown in Table 9, quality of life factors are becoming increasingly important to companies in the site selection decision process. The importance of the availability and quality of public education is reflected in the results of a recent survey of corporate executives in the U.S. who ranked public schools as the 2nd most important quality of life site selection factor after low crime rate and ahead of housing availability, housing costs, and health facilities (Area Development. 22nd Annual Corporate Survey. 2007).

Table 9: Top Ranking Quality of Life Factors for U.S. Corporations

Rank	Quality of Life Factors [a]	2006 survey (%)	2007 survey (%)
1	Low crime rate	70.8	74.0
2	Ratings of public schools	64.4	62.6
3	Housing availability	54.4	62.1
4	Housing costs	63.9	58.8
5	Health facilities	60.8	57.4
6	Climate	48.6	51.6
7	Cultural opportunities	41.4	48.7
8	Colleges and universities in area	44.6	47.3
9	Recreational opportunities	43.7	43.4

[a] Respondents were asked to rate the various quality of life factors as either “very important,” “important,” “minor consideration,” or “of no importance.” The figures presented in this table represent the combination of “very important” and “important” ratings.
Source: Area Development. 22nd Annual Corporate Survey. 2007.

3.3 Municipal Tax Rate

A review of property tax rates for selected property classes for the Township of Norwich (as well as the villages in the Township) and the municipalities of Tillsonburg, Ingersoll, Delhi, and the Township of Guelph Eramosa was undertaken to compare rates.

Property classes where a municipality is typically competing for new growth opportunities include:

- Residential;
- Multi-residential;
- Commercial; and
- Industrial classes.

Table 10 and 11 provide a summary of tax rates for the five communities. The 2007 tax rate for residential/farm and multi-residential property in the Township of Norwich is 1.3% and 3.2% respectively. The tax rate for residential/farm property in the Township of Norwich (as well as the villages in the Township) is slightly lower than the rates reported for Tillsonburg, Ingersoll and Delhi which range from 1.4% to 1.6% and comparable to the rate reported for the Township of Guelph/Eramosa (1.3%). The tax rate for multi-residential property in the Township of Norwich is also lower than the rates reported for Tillsonburg (4.1%) and Ingersoll (3.7%) but slightly higher than Delhi (2.2%) and the Township of Guelph Eramosa (2.3%).

The 2007 tax rate for commercial and industrial property in the Township of Norwich is 4.1% and 5.7% respectively. The tax rate for commercial property in the Township of Norwich (as well as the villages in the Township) is slightly lower than the rates reported for Tillsonburg (4.9%) and Ingersoll (4.4%) but higher than the rates reported for Delhi (3.8%) and the Township of Guelph/Eramosa (2.7%). The tax rate for industrial property in the Township of Norwich (as well as the villages in the Township) is also slightly lower than the rates reported for Tillsonburg (6.2%) and Ingersoll (6.2%) but higher than the rates reported for Delhi (4.5%) and the Township of Guelph/Eramosa (4.8%).

Table 10: Property Taxes for the Township of Norwich - 2007

Selected Property Tax Class	Township of Norwich Tax Rate	Total Tax Rate for Norwich Villages [a]			
		Norwich	Burgessville	Otterville	Springford
Residential / farm	0.013350	0.013607	0.013694	0.013613	0.013697
Multi-residential	0.031980	0.032685	0.031980	0.031980	0.031980
Commercial	0.040960	0.041432	0.041614	0.041461	0.041619
Commercial vacant units / excess land	0.028680	0.029022	0.029138	0.028680	0.028680
Commercial vacant lands	0.028680	0.029022	0.028680	0.029030	0.028680
Industrial	0.057430	0.058106	0.058335	0.058122	0.057430
Industrial vacant units / excess land	0.037330	0.037330	0.037330	0.037330	0.037330
Industrial vacant lands	0.037330	0.037330	0.037330	0.037330	0.037330
Farmlands	0.003340	0.003404	0.003426	0.003406	0.003427

[a] Includes Township of Norwich Tax Rate and Special Area Rates.
Source: Township of Norwich 2007 Tax Rates – By-Law No. 33-2007.

Table 11: Property Taxes for Comparison Communities - 2007

Selected Property Tax Class	Total Tax Rate for Tillsonburg	Total Tax Rate for Ingersoll	Total Tax Rate for Delhi	Total Tax Rate for Guelph/Eramosa
Residential / farm	0.016721	0.01507	0.013958	.0126010
Multi-residential	0.041221	0.036697	0.021800	.0225621
Commercial	0.048975	0.044239	0.038518	.0267431
Commercial vacant units / excess land	0.034283	0.030967	0.025807	.0187202
Commercial vacant lands	0.034283	0.030967	0.025807	.0187202
Industrial	0.062579	0.061959	0.045458	.0480030
Industrial vacant units / excess land	0.040676	0.040274	0.030457	.0312019
Industrial vacant lands	0.040676	0.040274	0.030457	.0312019
Farmlands	0.003826	0.003767	0.003489	.0031502

Source: Town of Tillsonburg 2007 Tax Rates – Schedule "A " to By-Law No. 3260; Town of Ingersoll 2007 Tax Rates; Norfolk County 2007 Tax Rates – By-Law No. 2007-136; Township of Guelph/Eramosa 2007 Tax Rates.

Additional details on the tax rates for the five communities are provided in Appendix B.

3.4 Development Charges

A comparison of development charges for the Township of Norwich, Tillsonburg, Ingersoll, Delhi, and the Township of Guelph Eramosa was undertaken using the most current data available. A development charge is a fee charged to new development to finance the cost of new growth related capital facilities and infrastructure. Development charges provide a major source of funding for growth-related capital expenditures. Development charges help to protect existing taxpayers from the burden of financing growth related capital expenditures. All five of the municipalities examined here charge development charges.

Oxford County features a combination of county wide development charges as well as area municipality charges. Services that are covered under county wide charges include general government, long-term care, land ambulance, and roads and related. Library services are also covered under the county wide charges except in Tillsonburg where library services are charged under the local development charge schedule.

Oxford County also sets the area municipality charges for water and wastewater services. Areas not serviced by municipal sewer and water services are exempt.

Area specific charges for the Township of Norwich, Tillsonburg and Ingersoll include general government, fire services, police services, and roadways.

With respect to the Township of Guelph/Eramosa, Wellington County features a combination of county wide development charges as well as area municipality charges. Services that are covered under county wide charges include police, roads and related (garages and equipment), library, administration, ambulance, childcare, and the health unit. Area specific charges for the Township of Guelph/Eramosa include general government, fire services, public works, and parks and recreation. Sewer and wastewater charges apply to Rockwood. Areas not serviced by municipal sewer and water services are exempt.

In the case of Delhi, development charges were consolidated for the former Townships of Delhi and Norfolk, Town of Simcoe, and former Regional Municipality of Haldimand-Norfolk in 1999. Development charges in Delhi are for general government, fire, ambulance, roadways, library, recreation and water.

Development charges for single and semi-detached residential units in the Township of Norwich amount to just under $9,200 which is about $700 higher than the charges in Tillsonburg and Ingersoll. Development charges for apartment units in the Township of Norwich amount to just under $3,400 for 1 bedroom and just over $4,500 for 2 bedrooms which is slightly higher than the comparable charges in Tillsonburg and Ingersoll.

With respect to non-residential development, charges in the Township of Norwich amount to $3.57 per square foot of floor area which is slightly lower than the charges in Ingersoll ($3.83) and slightly higher than the charges in Tillsonburg ($3.45).

As shown in Table 12, development charges for residential units in Delhi and the Township of Guelph/Eramosa are considerably lower compared to the other three communities. Development charges for non-residential development in Delhi are substantially higher than the other four communities while the charges in the Township of Guelph/Eramosa are substantially lower.

The following table summarizes the total development charges for the four municipalities described above including upper and lower government tier charges.

Table 12: Development Charges for Select Municipalities – 2007

Municipality	$ / Residential Dwelling Unit				Non-Residential [a]
	Single and Semi-detached	Apartment 2 Bedroom and Larger	Apartment Bachelor and 1 Bedroom	Other Multiples	$ / square foot of floor area
Township of Norwich	9,195.03	4,513.58	3,386.93	6,492.94	3.57
Tillsonburg	8,411.49	4,341.27	3,258.19	6,243.36	3.45
Ingersoll	8,481.44	4,376.98	3,284.97	6,297.45	3.83
Delhi	1,216.00	797.00	650.00	815.00	7.28
Township of Guelph/Eramosa	4,230.30	1,929.64	1,778.01	3,063.60	1.22

[a] Industrial buildings exempt.
Source: Oxford County Development Charges – effective April 1, 2007; Norfolk County Development Charges – effective Sept. 7, 2007; Wellington County Development Charges – effective January 1, 2008; Township of Guelph/Eramosa – effective January 1, 2008.

Additional details on the development charges for the five communities are provided in Appendix C.

Additional Water Development Charges

In the Village of Norwich, the Town of Tillsonburg and the Town of Ingersoll, the construction of a water service line from the main to the street line is set at $2,500+ plus the applicable development charges (the value is based on standard construction detail for a ¾" service and the cost is adjusted for larger service stubs). Where a watermain does not exist in front of the property and it is feasible to extend the watermain, the property owner will be charged the actual prorated charge for extending the watermain and constructing the water service to the property line.[19]

[19] In Otterville and Springford the construction of a water service stub from the main to the street line is set at $4,000 (the value is based on standard construction detail for a ¾" service and the cost is adjusted for larger service stubs). Where a watermain does not exist in front of the property and it is feasible to extend the watermain, the property owner will be charged the actual prorated charge for extending the watermain and constructing the water service to the property line.

Building Permit Fees

All of the communities examined in this analysis use a variety of different building permit fee formulas for determining fees for new construction, additions/alterations to existing buildings, etc.

Using an example of a 10,000 sq ft new industrial building with a $500,000 construction value, Table 13 shows that the estimated building permit fee in the Township of Norwich would amount to $3,600 which is comparable to the fee applied in Ingersoll ($3,565), but considerably higher than the fee applied in the Township of Guelph/Eramosa ($2,650) and considerably lower than Tillsonburg ($5,035) and Delhi ($5,512).

Table 13: Estimated Building Permit Fee for a New Industrial Building in the Study Area

Proposed Development: New Industrial Building – 10,000 sq ft and $500,000 construction value		
Community	**Building Permit Fee**	**Total Building Fee Estimate**
Township of Norwich	• $100 flat fee • plus $7 per $1,000 of value,	$3,600
Tillsonburg	• $45 flat fee for the first $1000 of estimated value of construction • plus $10 per each additional $1000 or part thereof	$5,035
Ingersoll	• Up to 30,000 sq ft: flat fee $65 + $0.35 sq. ft. • 30,001 sq ft and up: flat fee $65 + $0.25 sq. ft.	$3,565
Delhi	• $45 for the first $3,000 • plus $11 per $1,000 construction thereafter.	$5,512
Township of Guelph/Eramosa	• $10 per $1,000 for the first $30,000 of estimated value of construction • plus $5 per each additional $1,000	$2,650

Additional details on the building permit fees are provided in Appendix D.

3.5 Electricity Costs

The electricity market in the Province of Ontario has been open to competition since May 2002 when the former Ontario Hydro (the single source power generator, power transmitter and rural distributor) was broken up into successor companies.

These entities include two commercial companies: Ontario Power Generation Inc. (OPG), which generates a significant portion of the electricity in the province, and Hydro One Networks Inc. which transmits power and distributes electricity to about 1.2 million customers, mostly in rural and remote communities. There is also the Independent Electricity System Operator (IESO), a not-for-profit crown corporation that runs the electricity exchange for the sale and purchasing of power and arranges for the dispatch of electricity to regulated distribution companies.

In Ontario, the Ontario Energy Board (OEB) is responsible for regulating electricity utilities (as well as natural gas marketers) and it also establishes the commodity price for electricity payable by low volume customers. The recently created Ontario Power Authority (OPA) is responsible for ensuring an adequate, long-term supply of electricity in Ontario to achieve the targets set by government for an integrated system plan for generation, transmission, conservation and renewable energy development.

Electricity prices in Ontario are based on the costs of generation, long-distance transmission and local distribution. Consumer rates vary by customer class (i.e., residential, commercial, industrial). Large power users who use more than 250,000 kilowatt-hours of electricity per year are free to negotiate long-term contracts with a retailer for their supply of electricity (Ontario Economic Development. Dec. 5, 2007. www.2ontario.com/welcome/oout_515.asp).[20]

The commodity charge (the cost of power) represents just one component of the electricity bill and typically accounts for about half of the total cost (IESO. Guide to Electricity Charges in Ontario’s Competitive Marketplace. Dec. 2007. www.ieso.ca/imoweb/pubs/media/Electricity_Charges.pdf). Other charges include regulated charges such as the delivery charges (fixed monthly distribution charges and variables rates), transmission charges, wholesale market charges, and Ontario Hydro debt reduction charges.

[20] Ontario is part of an interconnected electricity "grid" known as the Northeast Power Coordinating Council (NPCC). It is a network of power plants, substations and transmission lines that cross borders, allowing Ontario to import and export power. This grid serves two purposes. First, it enhances the stability of the system. And second, it allows utilities to sell power to each others, thereby reducing generation costs.

The Township of Norwich and the Town of Ingersoll

The Township of Norwich and the Town of Ingersoll are served by Erie Thames Power Corporation, an independent utility provider that serves markets in Ontario and the United States. Erie Thames Power was established in 2000 and represents the amalgamation of the Public Utilities Commissions within the municipalities of Port Stanley, Aylmer, Belmont, Ingersoll, Thamesford, Otterville, Norwich, Burgessville, Beachville, Embro and Tavistock. Erie Thames Power serves more than 13,000 customers in this region.

As shown in Table 14 and 15, the general (business) service and residential electricity rate in the Township of Norwich and the Town of Ingersoll as charged by the Erie Thames Power Corporation amounts to 5.3 cents/kWh for the first 750 kWh and 6.2 cents/kWh over 750 kWh.

Table 14: Township of Norwich / Town of Ingersoll Electricity Rates - General Service (Aug. 2007)

	Under 50 kw	Over 50 kw	Over 1,000 kw	Over 3,000 kw	Over 5,000 kw
Commodity Charges					
First 750 kwh (per kwh)	$0.053	$0.053	$0.053	$0.053	$0.053
Over 750 kwh (per kwh)	$0.062	$0.062	$0.062	$0.062	$0.062
Delivery					
Monthly Service charge	$27.69	$387.30	$6,370.03	$7,138.82	$14,462.55
Distribution Charge (per kwh)	$0.0208	$2.8277	$4.6515	$2.5074	$1.3803
Transmission Charge (per kwh)	$0.0089	$1.6359	$1.7592	$1.8774	$1.9955
Transmission Network (per 7-7 kw) [a]		$1.9561	$2.1246	$2.2400	$2.3553
Regulatory					
Wholesale Market Service	$0.0062	$0.0062	$0.0062	$0.0062	$0.0062
RPP Administration Charge (per month)	$0.25	$0.25	$0.25	$0.25	$0.25
Ontario Hydro Debt Reduction (per kwh)	$0.007	$0.007	$0.007	$0.007	$0.007

[a] 7-7 kW applied to customers having an interval meter. Alternatively, maximum kW is used.
Source: Erie Thames Power Schedule of Rates and Charges – Effective Aug. 1, 2007.

Table 15: Township of Norwich / Town of Ingersoll Electricity Rates - Residential Service (Oct. 2007)

Commodity Charges	
First 750 kwh (per kwh)	$0.053
Over 750 kwh (per kwh)	$0.062
Delivery	
Monthly Service charge	$14.06
Distribution Charge (per kwh)	$0.0200
Transmission Charge (per kwh)	$0.0097
Regulatory	
Wholesale Market Service	$0.0062
RPP Administration Charge (per month)	$0.25
Ontario Hydro Debt Reduction (per kwh)	$0.007

Source: Erie Thames Power Schedule of Rates and Charges – Effective Aug. 1, 2007.

Tillsonburg

The distribution of electricity and maintenance of the power grid in the Town of Tillsonburg is the primary focus and responsibility of Tillsonburg Hydro Inc. (THI). THI is 100% owned by the Town of Tillsonburg and operates as a regulated company under the auspices of the Ontario Energy Board. THI serves more than 6,500 customers covering 22 square kilometers in the Town of Tillsonburg.

The general service and residential electricity rate in the Town of Tillsonburg as charged by Tillsonburg Hydro Inc. amounts to 5.0 cents/kWh for the first 750 kwh and 5.9 cents/kWh over 750 kwh (Table 16 and 17). This is slightly lower than the rate charged by Erie Thames Power Corporation in the Township of Norwich.

Table 16: Tillsonburg Electricity Rates - General Service (Nov. 2007)

	Under 50 kw	50 to 499 kw	500 to 4999 kw
Commodity Charges			
Fixed Commodity Charge First 750 kWh (per kWh)	$0.050	$0.050	
Fixed Commodity Charge Over 750 kWh (per kWh)	$0.059	$0.059	
or Commodity Charge (SSS) (per kWh)		spot market price	spot market price
Delivery			
Monthly Service Charge	$25.03	$111.76	$1,158.42
Distribution Charge (per kWh)	$0.012	$1.4499	$1.0551
Ontario Hydro Debt Reduction (per kWh)	$0.007	$0.007	$0.007
Non-Competitive Energy Charges			
Transmission Network Service Rate (per kWh)	$0.0050	$1.9295	$2.5330
Transmission Connection Service Rate (per kW)	$0.0041	$1.5798	$2.1518
Wholesale Market Service Rate (per kWh)	$0.0062	$0.0062	$0.0062

Source: Tillsonburg Hydro Inc. New Rates – Effective Nov. 2007.

Table 17: Tillsonburg Electricity Rates - Residential Service (Nov. 2007)

Commodity Charges	
Fixed Commodity Charge First 750 kWh (per kWh)	$0.050
Fixed Commodity Charge Over 750 kWh (per kWh)	$0.059
Delivery	
Monthly Service Charge	$11.65
Distribution Charge (per kWh)	$0.0204
Ontario Hydro Debt Reduction (per kWh)	$0.007
Non-Competitive Energy Charges	
Transmission Network Service Rate (per kWh)	$0.0055
Transmission Connection Service Rate (per kW)	$0.0045
Wholesale Market Service Rate (per kWh)	$0.0062

Source: Tillsonburg Hydro Inc. New Rates – Effective Nov. 2007.

Township of Guelph/Eramosa (Rockwood Area)

Guelph Hydro Electric Systems Inc. is Guelph's and Rockwood's electricity distribution company. The general service and residential electricity rate in the Rockwood Area as charged by Guelph Hydro amounts to 5.0 cents/kWh for the first 750 kwh and 5.9 cents/kWh over 750 kwh (Table 18 and 19). This is slightly lower than the rate charged by Erie Thames Power Corporation in the Township of Norwich.

Table 18: Rockwood Area Electricity Rates - General Service (May 2007)

	Under 50 kw	Over 50 kw
Commodity Charges		
First 750 kWh (per kWh)	$0.050	$0.050
Charge Over 750 kWh (per kWh)	$0.059	$0.059
Delivery		
Monthly Service Charge	$17.45	$275.06
Distribution Charge (per kWh)	$0.021	$11.45
Transmission Network Service Rate (per kWh)	$0.0047	$2.27
Transmission Connection Service Rate (per kW)	$0.0047	$1.86
Regulatory Charges		
Wholesale Market Service Rate (per kWh)	$0.0062	$0.0062
Ontario Hydro Debt Reduction (per kWh)	$0.007	$0.007

Source: Guelph Hydro Electric Systems Inc. Rates – Effective May 2007.

Table 19: Rockwood Area Electricity Rates – Residential Service (May 2007)

	Over 50 kw
Commodity Charges	
First 750 kWh (per kWh)	$0.050
Charge Over 750 kWh (per kWh)	$0.059
Delivery	
Monthly Service Charge	$14.17
Distribution Charge (per kWh)	$0.0163
Transmission Network Service Rate (per kWh)	$0.0061
Transmission Connection Service Rate (per kW)	$0.0052
Regulatory Charges	
Wholesale Market Service Rate (per kWh)	$0.0062
Ontario Hydro Debt Reduction (per kWh)	$0.007

Source: Guelph Hydro Electric Systems Inc. Rates – Effective May 2007.

Greater Toronto Area

Electricity rates in the City of Mississauga were examined to provide a general comparison of the rates in the GTA and rates in the study area (Table 20 and 21).

The commodity charges for general service are comparable for Mississauga and Tillsonburg (5.0 cents/kWh for the first 750 kwh and 5.9 cents/kWh over 750 kwh). However, the distribution charge for businesses in Tillsonburg is lower than Mississauga (e.g. 1.2 cents/kWh vs. 1.6 cents/kWh, under 50 kw; and $1.45/kWh vs. $4.72/kWh, 50-500kw).

Mississauga and Tillsonburg also have comparable residential commodity charges (5.0 cents/kWh for the first 750 kWh and 5.9 cents/kWh over 750 kwh) although Mississauga has a lower distribution charge (1.39 cents/kWh vs. 2.04 cents/kWh).

Compared to Tillsonburg and Mississauga, the Township of Norwich and the Town of Ingersoll have slightly less competitive electricity rates for businesses (5.3 cents/kWh for the first 750 kwh and 6.2 cents/kWh over 750 kwh). While the distribution charges for businesses in the Township of Norwich and the Town of Ingersoll are higher than Tillsonburg, they are generally lower than Mississauga.

With respect to residential commodity charges, the rates in the Township of Norwich and the Town of Ingersoll are slightly less competitive compared to Tillsonburg and Mississauga but the distribution charge for residential service is slightly lower than Mississauga.

Table 20: Mississauga Electricity Rates - General Service (Nov. 2007)

	Under 50 kw	Over 50 kw	Over 500 kw	Over 5,000 kw
Commodity Charges				
First 750 kwh (per kwh)	$0.050	$0.050	$0.050	$0.050
Over 750 kwh (per kwh)	$0.059	$0.059	$0.059	$0.059
Delivery				
Monthly Service charge	$29.93	$74.24	$1,240.76	$13,247.54
Distribution Charge (per kwh)	$0.0160	$4.7193	$1.6684	$2.8080
Transmission Charge (per kwh)	$0.0099	$3.9245	$3.8168	$4.0744
Regulatory				
Wholesale Market Service	$0.0062	$0.0062	$0.0062	$0.0062
Administration Charge (per month)	$0.25	$0.25	$0.25	$0.25
Ontario Hydro Debt Reduction (per kwh)	$0.007	$0.007	$0.007	$0.007

Source: Mississauga Hydro - Nov. 1, 2007.

Table 21: Mississauga Electricity Rates - Residential Service (Nov. 2007)

Commodity Charges	
First 1,000 kwh (per kwh)	$0.050
Over 1,000 kwh (per kwh)	$0.059
Delivery	
Monthly Service charge	$12.33
Distribution Charge (per kwh)	$0.0139
Transmission Charge (per kwh)	$0.0110
Regulatory	
Wholesale Market Service	$0.0062
Ontario Hydro Debt Reduction (per kwh)	$0.007

Source: Mississauga Hydro - Nov. 1, 2007.

3.6 Water and Wastewater Rates

Municipalities are responsible for the establishment of water and sewer rates and the absence of standard procedures across Ontario has resulted in the emergence of a variety of rate structure formats. Rates may vary depending on the interests and objectives of municipalities (e.g. economic development, rate stability, conservation, financial sufficiency, ease of implementation/understanding).

Since 2000, all aspects of water and wastewater services in Oxford County have been administered and maintained by the County Public Works Department.

Township of Norwich and Town of Tillsonburg

Monthly water rates for the Township of Norwich and the Town of Tillsonburg are presented in the following two tables (Oxford County Water Rates).

Table 22: Oxford County Monthly Water Rates – In Town - 2007

Meter Size	Rate for Minimum Bill	Minimum Cubic Meters	Minimum Bill	Second Rate $0.69
3/4"	$1.47	10	$14.70	Balance
1"	$1.47	25	$36.75	Balance
1 1/2"	$1.47	50	$73.50	Balance
2"	$1.47	80	$117.60	Balance
3"	$1.47	160	$235.20	Balance
4"	$1.47	250	$367.50	Balance
6"	$1.47	500	$735.00	Balance
Flat Rate	$3.10	per 1/2" outlet		

Source: County of Oxford By-Law No. 4811-2007

Table 23: Oxford County Monthly Water Rates – Out of Town - 2007

Meter Size	Rate for Minimum Bill	Minimum Cubic Meters	Minimum Bill	Second Rate $1.27
3/4"	$2.67	10	$26.70	Balance
1"	$2.67	25	$66.75	Balance
1 1/2"	$2.67	50	$133.50	Balance
2"	$2.67	80	$213.60	Balance
3"	$2.67	160	$427.20	Balance
4"	$2.67	250	$667.50	Balance
6"	$2.67	500	$1,335.00	Balance
Flat Rate	$5.64	per 1/2" outlet		

Source: County of Oxford By-Law No. 4811-2007

In the Township of Norwich the County of Oxford maintains plants in Norwich, Otterville, and Springford. Norwich is fully serviced (water and waste water) while Otterville and Springford are water only settlements.

The monthly wastewater rate for the Village of Norwich amounts to 105% of the metered water rate while the monthly wastewater rate for the Town of Tillsonburg amounts to 100% of the metered water rate (for Residential, Institutional, Commercial and Industrial).

Town of Ingersoll

Monthly water rates for the Town of Ingersoll are presented in the following table.

Table 24: Town of Ingersoll Monthly Water Rates – 2007 [a]

Meter Size	Rate
3/4"	$13.13
1"	$38.61
1 1/4"	$64.10
1 1/2"	$89.56
2"	$115.05
3"	$140.53
4"	$166.01
6"	$216.97
Metered Water Charge	.56m^3 per cubic meter

[a] Water rate consists of metered consumption plus service charge. Service charge applied per unit where applicable.
Source: County of Oxford By-Law No. 4811-2007

The monthly wastewater rate for the Town of Ingersoll amounts to 117% of the metered water rate for residential, 123% of the metered water rate for commercial, and 129% of the metered water rate for industrial. The rate for sewage only customers amounts to $342.10/year.

Additional County Wide Charges in Oxford County

Customers in the Township of Norwich and the Towns of Tillsonburg and Ingersoll also pay for the following County Wide charges:

County Wide Water and Wastewater programs:

- County Servicing and Assistance Program (CSAP)
    - Each water customer in the County pays $10.00/year into a fund to extend services to existing properties as detailed in the CSAP policy approved by County Council
    - Each sewer customer pays $10/year into a fund to extend services to existing properties as detailed in the CSAP policy approved by County Council
- Debt Payment Plan
    - Each water customer in the County pays $8.00/year until 2010, to pay off previously unfinanced debt on several small water systems

- o Each sewage customer in the County pays $5.00/year until 2010, to pay off previously unfinanced debt on several small sewage systems
- Small System Deficit Payment Plan
  - o Each water customer in the County pays $10.00/year to finance the small systems operating expense not covered by customer service charges.

County Wide Regulation 170 Upgrade Program (in addition to all other charges)

- .07 per cubic metre
- Minimum charge of $5.00 per month per customer

Delhi

The current water rate for Delhi includes a two-block declining volumetric rate and a fixed basic charge by meter size. The estimated amount to be recovered from water billings and the estimated total water supplied to customers plus the projected number of meters by size is used to determine the appropriate rates for the year. The rates are calculated as follows:

Table 25: Delhi 2007 Water Rates - Effective February 1, 2007.

				2007 Budget
Water Billing Recovery				**$8,061,700**
Estimated 1st Block (Cu.M)				2,697,900
Estimated 2nd Block (Cu.M)				1,144,100
Estimated Consumption				**3,842,000**
Consumption Charge			**Rates**	
Water Rate - 1st Block			$1.55	$4,184,443
Water Rate - 2nd Block			$1.09	$1,242,493
Total Consumption Charges				**$5,426,936**
Fixed Basic Charge				
	Size of Meter	# of Meters	Monthly Rates	
	16 & 19	13,070	$14.97	$2,347,895
	25	47	$24.84	$14,010
	37	56	$41.57	$27,935
	50	137	$104.92	$172,488
	75	7	$121.04	$10,167
	100	11	$236.99	$31,283
	150	1	$425.63	$5,108
	200	0	$688.96	$0
Total Fixed Charges				**$2,608,886**
Estimated Flat Rate & Standby Charges				**$26,444**
Total Recovery				**$8,062,266**
Surplus / (Deficit) (due to rounding)				$566

Source: Norfolk County Information Bulletin: Fees for Water Services. November 28, 2006.

Table 26: Delhi 2007 Wastewater Rates - Effective February 1, 2007.

				2007 Budget
Wastewater Billing Recovery				**$5,169,600**
Estimated 1st Block (Cu.M)				2,697,900
Estimated 2nd Block (Cu.M)				1,144,100
Estimated Consumption				**3,842,000**
Consumption Charge			**Rates**	
Wastewater Rate - 1st Block			$1.05	$2,838,191
Wastewater Rate - 2nd Block			$0.74	$842,058
Total Consumption Charges				**$3,680,249**
Fixed Basic Charge				
	Size of Meter	# of Meters	Monthly Rates	
	16 & 19	13,070	$10.15	$1,591,926
	25	47	$16.84	$9,498
	37	56	$28.18	$18,937
	50	137	$71.14	$116,954
	75	7	$82.07	$6,894
	100	11	$160.68	$21,210
	150	1	$288.58	$3,463
	200	0	$467.11	$0
Total Fixed Charges				**$1,768,882**
Sewer-to-Meter Ratio Adjustment				**-$276,100**
Total Recovery				**$5,173,031**
Surplus / (Deficit) (due to rounding)				$3,431

Source: Norfolk County Information Bulletin: Fees for Wastewater Services. November 28, 2006.

3.7 Information and Communications Technology

As businesses grow to depend on the exchange of information as a core business function, there is a growing expectation that fast and reliable communication services will be available at all operating locations.

As noted in The Ontario Rural Council (TORC) Broadband Access Report (Aug. 2007), broadband is a community economic development enabler and has powerful cross-sectoral impact - health, education, business – as well as the capability of eliminating recurrent distance and weather-related challenges in rural communities (p.3). The report asserts that…

> *without the benefit of broadband, a business will think twice about expanding or locating in a rural/remote community. In broadband challenged communities, youth are out-migrating and physicians refusing to set up practice. Municipal governments are finding broadband a necessity for many services, including forecast planning, where GIS capabilities is fast-becoming essential (p.8).*

In its review of rural broadband connectivity in rural Ontario, TORC identified large areas that are not serviced via broadband and have little prospect of having this need filled in the immediate future. One of the main reasons cited for this gap relates to the insufficient return on investment that the private sector identifies with the more rural areas where there is a limited or no funding support. The report notes that without broadband, rural communities will not have the advantages of their urban counterparts and the ‘digital divide’ between urban and rural communities will widen (p.3).

The Township of Norwich is relatively well serviced with respect to broadband connectivity. Bell Canada provides broadband Internet service in the Villages of Norwich, Otterville and Burgessville while Execulink provides broadband service to regions surrounding the villages (almost all of the way up to Woodstock and as far south as Milldale). Not all areas of the Township have broadband access and some areas are using dial up services. Cable services are provided in the villages by Nor-del. Cellular phone service is available throughout the Township.

Tillsonburg, Ingersoll and Delhi all have local internet providers that provide high-speed and broadband Internet services. These communities also have full cable service and extensive cellular phone coverage (Southwestern Ontario Marketing Alliance; Norfolk County Economic Development – Community Profile. 2007).

The TORC report also identifies the need for raising awareness in rural communities about the availability of broadband access. The report cites examples where consumers did not know that a broadband service was available in their own community. It also emphasizes that not all consumers may need broadband service in order to view the Internet as there are many instances where a good dial-up account will suffice. However, generally speaking, a ‘broadband’ connection is required if users are to participate in enhanced applications. As noted in the report…

without a solid understanding of broadband and the Internet, potential users will have limited comprehension of the benefits of connectivity and will, as a result, tend to have limited adoption of use. Use of online applications will be dismal, as users don't know what to ask for. Low-speed users think in terms of 'low-speed' capabilities, not knowing what can be delivered via high speed. Improved knowledge of the Internet can also provide for enhanced productivity – for example, the application for a license online saves both travel time and related costs. There exists the need for a greater understanding and appreciation of broadband from a business / commercial perspective. Many businesses still do not grasp the advantages of having broadband and too often view only the costs, not the costs savings. They will adapt if they don't have it, making do (p5).

Initiatives aimed at raising the awareness of enhanced Internet applications could provide benefits to the local business community. The Township of Norwich and/or the Chamber of Commerce could look at options for partnering with local service providers to conduct information sessions and technology showcases. This could also include...

real life demonstrations of enhanced and interactive applications can 'prove the case' (e.g. applications for municipal processes – licenses, planning, farming, health and education). Use of home and cottage tradeshows and other public venues may be a means of providing potential users with hands-on experience. These demonstrations could include work-at-home techniques and technologies (e.g. virtual private networks or VPNs). Alternatively, demonstrations could be made onsite at businesses as opposed to the employees having to go offsite to learn, as small-medium enterprises (SME) claim to have little available time. Demonstrations might also provide hands-on training for technical and equipment repairs and/or assistance with dispelling the myths related to Internet security (p.6).

3.8 Vacant Residential and Employment Land

The Oxford County Official Plan contains objectives for maintaining an adequate supply of residential and employment lands in the large urban centres (Woodstock, Tillsonburg, and Ingersoll) and rural settlement designations.

The 2005 Provincial Policy Statement (PPS) also contains policies requiring municipalities to ensure sufficient land is made available to accommodate anticipated growth. As noted in Section 1.1.2 of the PPS:

> Sufficient land shall be made available through *intensification* and *redevelopment* and, if necessary, *designated growth areas*, to accommodate an appropriate range and mix of employment opportunities, housing and other land uses to meet projected needs for a time horizon of up to 20 years.

As noted in Section 1.4.1, the PPS further requires that municipalities/planning authorities:

a. maintain at all times the ability to accommodate residential growth for a minimum of 10 years through *residential intensification* and *redevelopment* and, if necessary, lands which are *designated and available* for residential development; and
b. maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a 3 year supply of residential units available through lands suitably zoned to facilitate *residential intensification* and *redevelopment*, and land in draft approved and registered plans.

The 2007 Vacant Land Study (Nov. 2007) was undertaken by Oxford County to determine the amount of vacant land that exists within the fully serviced and water only settlements areas, as well as the designated future urban growth areas in Oxford County (as of April 1st 2007).[21]

[21] The vacant land inventory is primarily comprised of parcels which are deemed to be vacant or substantially vacant e.g. do not contain any buildings or structures which would be likely to interfere with their future development. Larger commercial and industrial parcels containing existing dwellings, farm outbuildings or other structures are typically deemed to be vacant, as it is anticipated that such building and structures will be removed prior to development of these lands. The inventory also includes vacant portions of under-utilized lands which may have potential for future infill development or substantial redevelopment or expansion. The inventory also includes any additional lands identified as vacant or underutilized by the planner for the area municipality and/or area municipal staff. The inventory does not include lands that, due to their nature, are not suitable for future development e.g. lands zoned Open Space, lands zoned for Institutional uses, environmental constraint areas, lands owned by the County or area municipality that are likely to remain undeveloped, under-utilized lands without direct access to an open public road (County of Oxford Vacant Lands Study. Nov. 2007. pp.4-5).

Vacant lands are classified into two primary categories: residential lands and employment lands. Residential lands include low, medium and high density residential lands while employment lands are comprised of those non-residential lands that are designated or zoned for industrial, commercial and institutional uses.

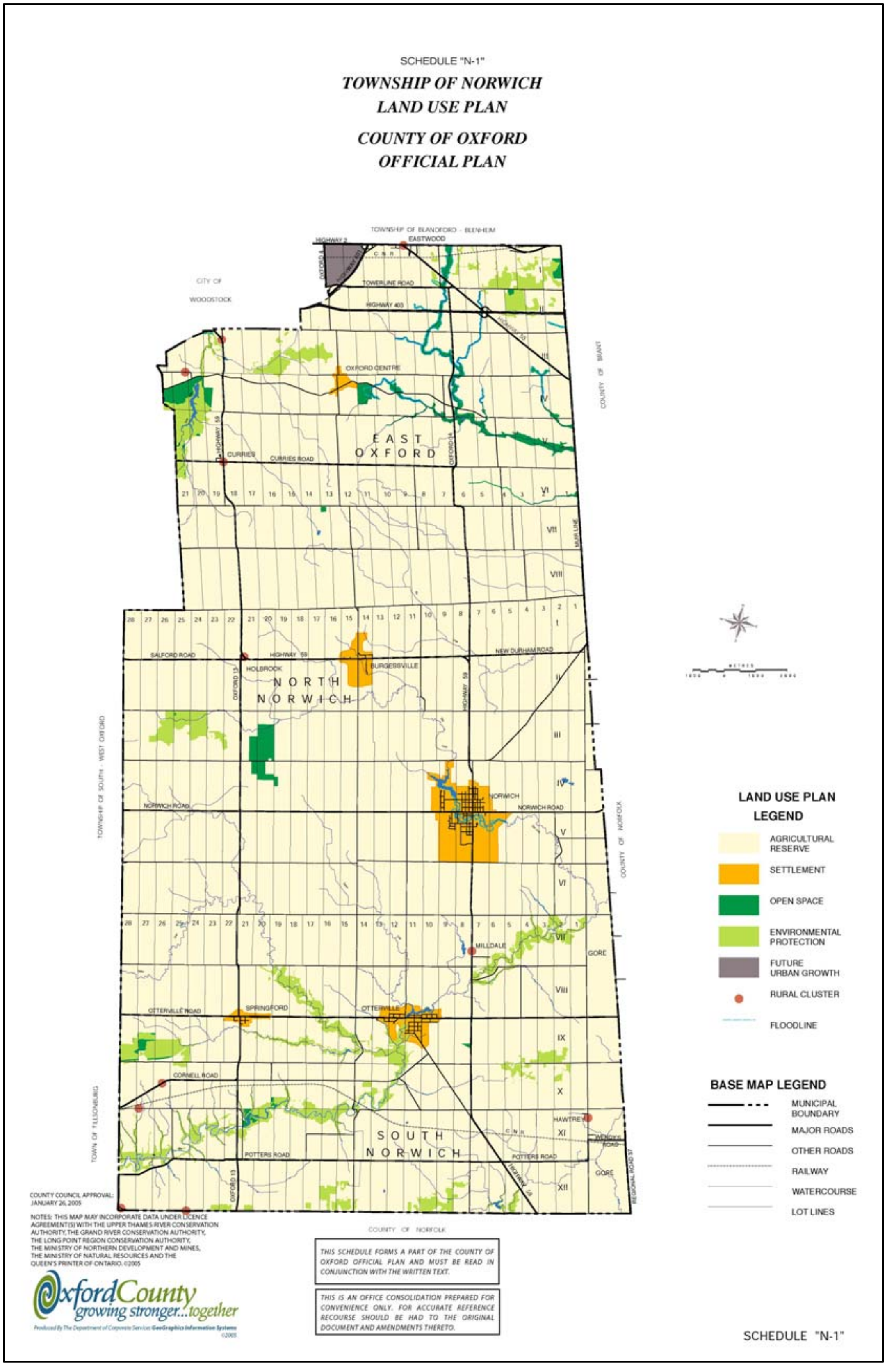
The Vacant Land Study also examines the extent to which the residential land supply requirements of the PPS and the County Official Plan can be satisfied by comparing forecasted residential demand to the estimated supply of residential land. A similar assessment was conducted for employment lands. Household and employment forecasts that were prepared for the County of Oxford by Hemson Consulting Inc. in 2006 were used to determine the estimated demand for future residential and employment land demands.

Township of Norwich

As outlined in the 2007 Vacant Land Study, villages such as Norwich which have full water and wastewater services can be regarded as growth centres while villages without full services such as Otterville and Springford are recognized as having some limited potential to accommodate future growth (Nov. 2007. p.3)

Map 9 shows the location of the Villages of Norwich, Otterville and Springford and the surrounding land use which is predominantly agricultural.

Map 9: Township of Norwich Land Use Plan



Based on estimates provided in the County of Oxford Vacant Land Study (2007), the Township of Norwich will need approximately 906 residential units to accommodate expected growth over the next 20 year period (2007-2027). The projected demand consists of 832 low density units and 74 medium density units. Most of this growth is anticipated to occur in the serviced (Village of Norwich) and water only villages (Otterville and Springford) although some demand will be met through residential development in villages without services and, to a lesser extent, through infilling in rural clusters (p.29-30).

The supply estimates for the Township of Norwich indicate that there is an adequate supply of low and medium density residential lands for the 3 year and 10 year periods. At the 20 year period the forecasts project an over-supply of low density residential lands and an under-supply of medium density residential lands. However, given the relatively low demand for medium density units, it is anticipated that most of the estimated demand could be met through redevelopment in mixed use areas such as the central commercial designation, which allows for medium density residential development, and through residential conversions (p.31).

Table 27: Township of Norwich - Estimated Demand for Residential Units vs. Actual Supply

Time Frame	Low Density (12 units per hectare)	Medium Density (43 units per hectare)	Total Units
3 Year			
3 year demand - residential units	96	0	96
3 year supply - residential units	369	0	369
Margin (+/-%)	+273%	+/-0%	+273%
10 Year			
10 year demand - residential units	414	34	448
10 year supply - residential units	1,325	54	1,379
Margin (+/-%)	+911%	+56%	+208%
20 Year			
20 year demand - residential units	832	74	906
20 year supply - residential units	1,325	54	1,379
Margin (+/-%)	+59%	-27%	+52%

Source: County of Oxford Vacant Land Study. Nov. 2007.

With respect to employment lands, the Township of Norwich currently has close to 25 ha of vacant employment lands of which of which 23.4 ha are industrial and 1.5 ha are commercial. Currently there are no vacant lands designated for institutional development or community facility in the Township.

Table 28: Township of Norwich – Vacant Employment Land Supply

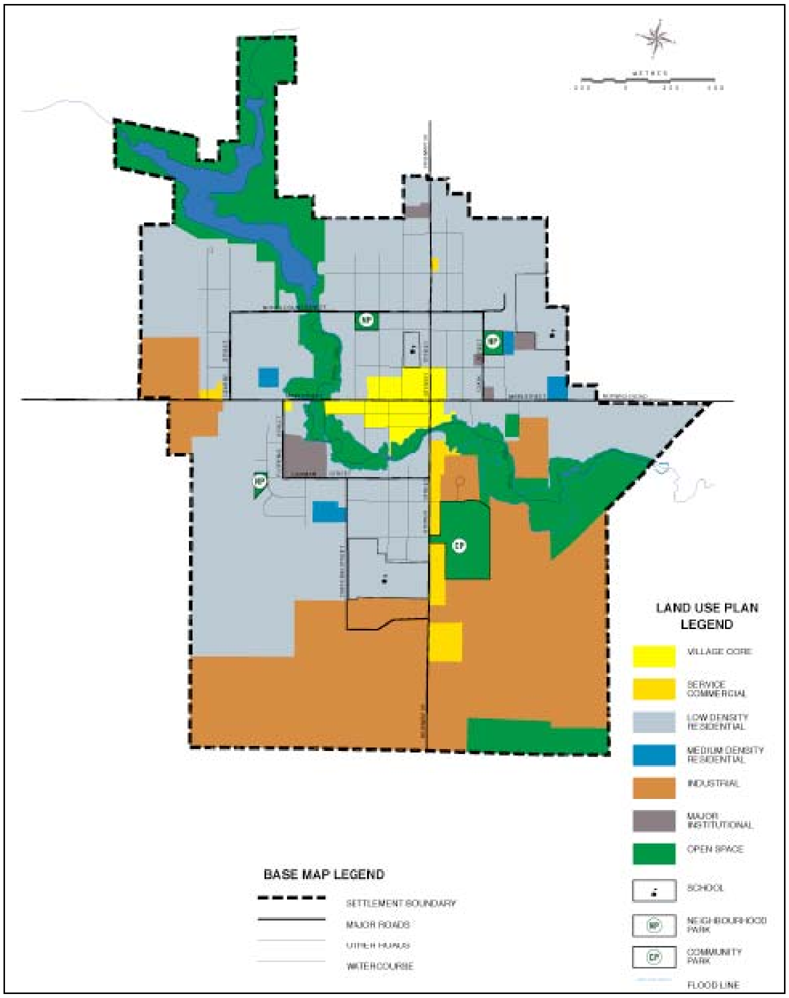
Time Frame	Industrial	Commercial	Community Facility	Total
Short Term Supply [a]	12.3 ha (33.4 ac)	1.5 ha (3.7 ac)	0 ha (0 ac)	13.8 ha (34.1 ac)
Long Term Supply [b]	11.1 ha (27.4 ac)	0 ha (0 ac)	0 ha (0 ac)	11.1 ha (27.4 ac)
Total	23.4 ha (57.8 ac)	1.5 ha (3.7 ac)	0 ha (0 ac)	24.9 ha (61.5ac)

[a] Short-term employment lands are existing vacant lots that are serviced and zoned for industrial, commercial or institutional uses. Lots in a submitted, approved or registered plan of subdivision or in a submitted or approved site plan control application are also included in the short-term time frame.
[b] Long-term employment lands are existing vacant parcels in industrial, commercial, Community Facility or Future Urban Growth designations (where intended for the development of employment uses and located within an existing settlement area boundary) in the Official Plan and are not zoned accordingly. They are often located in areas where municipal services are currently not available.
Source: County of Oxford Vacant Land Study. Nov. 2007.

Based on estimates for future employment land requirements (as derived from forecasts contained in the Oxford County Economic Strategy 2006), the Township of Norwich would require 3.5 ha of additional industrial employment land to accommodate projected demand to 2031 (Vacant Land Study 2007. p.37).

The Village of Norwich has a considerable amount of underutilized industrial land, primarily at the southern end of the village (Map 10), which could serve to address the deficiency if these lands were severed or otherwise made available for development (p.37).

Map 10: Village of Norwich Land Use Plan



Source: County of Oxford Official Plan, 2005 – Schedule N-2.

As noted in the 2007 Vacant Land Study, almost all of the vacant industrial lands in the serviced villages of Oxford County are privately owned which typically means that additional planning approvals are required before they can be developed for employment purposes (p.37). Industrial land development interests in these villages will need to factor in the time lag associated with obtaining the necessary planning approvals.

As well, the 2007 Vacant Land Study indicates that, in many cases, there is a lack of private land owner interest to develop such lands and significant cost to provide adequate services. This condition might require the individual Townships to examine opportunities to acquire and service industrial land to ensure such lands are available to capitalize on future demand. However, the Township of Norwich may still need to designate additional lands for industrial use over the longer term to accommodate the forecasted demand (p.37).

Tillsonburg

Based on estimates provided in the County of Oxford Vacant Land Study (2007), the Town of Tillsonburg will need approximately 2,355 residential units to accommodate expected growth over the next 20 year period (2007-2027). The projected 20 year demand consists of 2,145 low density units, 100 medium density units, and 110 high density units. The supply estimates for Tillsonburg indicate that there is an adequate supply of low, medium and high density residential lands for the 3 year, 10 year and 20 year periods with a significant over-supply of medium and high density lands. A number of benefits are associated with the estimated over-supply situation including the ability to respond to larger growth than anticipated, greater land price competition, and greater choice of location (p.19).

Although there is no requirement for additional residential lands within the 20 year planning period, there are close to 140 ha of vacant lands adjacent to the Town in the Township of South-West Oxford which are designated for future urban growth purposes and would need to be annexed into the Town prior to any development (p.21).

Table 29: Tillsonburg - Estimated Demand for Residential Units vs. Actual Supply

Time Frame	Low Density (12 units per hectare	Medium Density (46 units per hectare)	High Density (97 units per hectare)	Total Units
3 Year				
3 year demand - residential units	265	20	10	295
3 year supply - residential units	1,116	319	30	1,465
Margin (+/-%)	+321%	+1,495%	+200%	+396%
10 Year				
10 year demand - residential units	1,090	50	50	1,190
10 year supply - residential units	2,960	1,823	2,225	7,008
Margin (+/-%)	+172%	+3,546%	+4,350%	+489%
20 Year				
20 year demand - residential units	2,145	100	110	2,355
20 year supply - residential units	2,960	1,823	2,225	7,008
Margin (+/-%)	+38%	+1,723%	+1,923%	+198%

Source: County of Oxford Vacant Land Study. Nov. 2007.

With respect to employment lands, Tillsonburg currently has close to 166 ha of vacant employment lands of which of which 147 ha are industrial and 19 ha are commercial. Currently there are no vacant lands designated for institutional development or community facility in Tillsonburg.[22]

Table 30: Tillsonburg – Vacant Employment Land Supply

Time Frame	Industrial	Commercial	Community Facility	Total
Short Term Supply [a]	66.9 ha (165.3 ac)	7.5 ha (18.5 ac)	0 ha (0 ac)	74.4 ha (183.8 ac)
Long Term Supply [b]	80.0 ha (197.6 ac)	11.5 ha (28.4 ac)	0 ha (0 ac)	91.5 ha (226.1 ac)
Total	146.9 ha (363 ac)	19.0 ha (46.9 ac)	0 ha (0 ac)	165.9 ha (410 ac)

[a] Short-term employment lands are existing vacant lots that are serviced and zoned for industrial, commercial or institutional uses. Lots in a submitted, approved or registered plan of subdivision or in a submitted or approved site plan control application are also included in the short-term time frame.
[b] Long-term employment lands are existing vacant parcels in industrial, commercial, Community Facility or Future Urban Growth designations (where intended for the development of employment uses and located within an existing settlement area boundary) in the Official Plan and are not zoned accordingly. They are often located in areas where municipal services are currently not available.
Source: County of Oxford Vacant Land Study. Nov. 2007.

Based on estimates for future employment land requirements (as derived from forecasts contained in the Oxford County Economic Strategy 2006), Tillsonburg would require 23.4 ha of additional industrial employment land to accommodate projected demand to 2031 under a high growth scenario (Vacant Land Study 2007. p.22).

The Town of Tillsonburg currently owns about 35 ha of vacant industrial employment land but approximately half of this land is not yet serviced. The remainder of the vacant industrial employment land is held in private ownership which could impact the short term availability of these lands due to issues such as lack of owner interest, land banking and price speculation (p.22). The Town also has close to 29 ha of under-utilized employment lands with almost 24 ha designated as industrial.[23]

[22] As noted in the County of Oxford Vacant Land Study (2007), certain minor institutional uses, such as schools, churches, day care facilities, funeral homes and small retirement homes are permitted in the residential, service commercial and central area designations in Tillsonburg. Land for major institutional or community facility proposals has historically been drawn from other employment lands (p.22).
[23] These lands are not included in the Town's employment land inventory, as they are part of existing developed properties and not considered to be generally available for development, particularly in the case of industrial lands. However, these under-utilized lands may have some potential to accommodate future expansions of existing employment uses, or eventually be deemed surplus to the operation and marketed for development (p.26).

Ingersoll

Based on estimates provided in the County of Oxford Vacant Land Study (2007), the Town of Ingersoll will need approximately 1,800 residential units to accommodate expected growth over the next 20 year period (2007-2027). The projected 20 year demand consists of 1,550 low density units, 40 medium density units, and 210 high density units. The supply estimates for Ingersoll indicate that there is an overall under-supply of residential lands by a margin of 5%. The 20 year supply estimates show an over-supply of vacant lands for medium density residential purposes but an under-supply of lands for low and high density residential purposes.

In the shorter term (3 year period), Ingersoll has an adequate supply of low, medium and high density residential units but estimates for the 10 year period show that Ingersoll will not have an adequate supply of vacant land for high density residential purposes (pp.24-25).

Options for addressing the shortage of high density residential land could include re-designating some medium density land to high density and designating additional lands for high density residential purposes. Currently there is no Future Urban Growth land located adjacent to the Town of Ingersoll which is intended for residential development (p.25).

Table 31: Ingersoll - Estimated Demand for Residential Units vs. Actual Supply

Time Frame	Low Density (12 units per hectare	Medium Density (46 units per hectare)	High Density (97 units per hectare)	Total Units
3 Year				
3 year demand - residential units	200	5	30	235
3 year supply - residential units	312	284	32	628
Margin (+/-%)	+25%	+5,580%	+7%	+167%
10 Year				
10 year demand - residential units	800	20	110	930
10 year supply - residential units	957	714	32	1,703
Margin (+/-%)	+20%	+3,470%	-7%	+167%
20 Year				
20 year demand - residential units	1,550	40	210	1,800
20 year supply - residential units	957	714	32	1,703
Margin (+/-%)	-38%	+1,685%	-85%	-5%

Source: County of Oxford Vacant Land Study. Nov. 2007.

With respect to employment lands, Ingersoll currently has close to 64 ha of vacant employment lands of which of which 48 ha are industrial and 16 ha are commercial. Currently there are no vacant lands designated for institutional development or community facility in Ingersoll.[24]

Table 32: Ingersoll – Vacant Employment Land Supply

Time Frame	Industrial	Commercial	Community Facility	Total
Short Term Supply [a]	14.5 ha (35.8 ac)	15.9 ha (39.3 ac)	0 ha (0 ac)	30.4 ha (75.1 ac)
Long Term Supply [b]	33.4 ha (82.5 ac)	0.1 ha (0.2 ac)	0 ha (0 ac)	33.5 ha (82.8 ac)
Total	47.9 ha (118.4 ac)	16 ha (39.6 ac)	0 ha (0 ac)	63.9 ha (157.9 ac)

[a] Short-term employment lands are existing vacant lots that are serviced and zoned for industrial, commercial or institutional uses. Lots in a submitted, approved or registered plan of subdivision or in a submitted or approved site plan control application are also included in the short-term time frame.
[b] Long-term employment lands are existing vacant parcels in industrial, commercial, Community Facility or Future Urban Growth designations (where intended for the development of employment uses and located within an existing settlement area boundary) in the Official Plan and are not zoned accordingly. They are often located in areas where municipal services are currently not available.
Source: County of Oxford Vacant Land Study. Nov. 2007.

Based on estimates for future employment land requirements (as derived from forecasts contained in the Oxford County Economic Strategy 2006), Ingersoll would require 251.7 ha of additional industrial employment land to accommodate projected demand to 2031 under a high growth scenario (Vacant Land Study 2007. p.26).

The Town of Ingersoll currently owns about 50 ha of the industrial employment land in the Town and the remainder is held in private ownership which could impact the short term availability of these lands due to issues such as land banking and price speculation (p.26). The Town also has about 27 ha of under-utilized employment lands with 26 ha designated as industrial.[25] There are also 36.5 ha of vacant lands adjacent to the Town of Ingersoll in the Townships of South-West Oxford and Zorra which are intended for commercial and industrial uses in the future (p.27).

[24] As noted in the County of Oxford Vacant Land Study (2007), certain minor institutional uses, such as schools, churches, day care facilities, funeral homes and small retirement homes are permitted in the residential, service commercial and central area designations in Ingersoll. Land for major institutional or community facility proposals has historically been drawn from other employment lands (pp.26-27).
[25] These lands are not included in the Town's employment land inventory, as they are part of existing developed properties and not considered to be generally available for development, particularly in the case of industrial lands. However, these under-utilized lands may have some potential to accommodate future expansions of existing employment uses, or eventually be deemed surplus to the operation and marketed for development (p.26).

Delhi

Norfolk County has major business/industrial parks in Simcoe, Delhi, and Courtland. There are approximately 36 ha of available industrial land in Simcoe and Courtland (Norfolk County Official Plan. Dec. 2007. www.norfolkofficialplan.on.ca/norfolk_county/). However, as of August 2006, all of the available land in the Delhi Industrial Park (located at the northwest corner of the Delhi urban area) has been sold.

Township of Guelph/Eramosa

The Township of Guelph/Eramosa has approximately 500 acres of vacant, unserviced, designated rural industrial land located in three different business parks. The three parks are located outside of urban areas and along major transportation routes:

- County Road 124 Business Park (200 acres of vacant lands with access to Highway 6 and the City of Guelph and minutes from Highway 401.
- Highway 7 Business Park (172 acres of vacant land with access to Highway 7 and access to Highway 401 via Guelph Line #44)
- Crewson's Corners Business Park (135 acres of vacant land with access to Highway 7 and access to Highway 401 via Regional Road #25 to Milton)

The County of Wellington Official Plan requires that all rural industrial areas be used for “dry” industrial uses which do not use significant amounts of water in their operation and which do not produce significant amounts of effluent (e.g. manufacturing, processing, fabrication and assembly of raw materials or repair, servicing, distribution and storage of materials. Accessory uses including the retail sale of products produced on-site may be allowed and the sale of agricultural products such as farm machinery and farm supplies may also be allowed (Wellington County Official Plan. 2006. p.43).

The two largest urban centres in the Township of Guelph/Eramosa – Rockwood and Eden Mills do not have designated industrial lands.

3.9 Industrial Land Prices

As reported in the 2007 Vacant Land Study, the Township of Norwich currently has close to 25 ha of vacant employment lands of which of which 23.4 ha are industrial and 1.5 ha are commercial and projections suggest the Township could require an additional 3.5 ha of industrial employment land to accommodate projected demand to 2031 (p.37).

The Vacant Land Study also notes that the Village of Norwich has a considerable amount of underutilized industrial land located primarily at the southern end of the village which could serve to address the deficiency if these lands were severed or otherwise made available for development (p.37). However, almost all of the vacant industrial lands in the serviced villages of Oxford County are privately owned which means that the development of these lands is highly dependent on the interests / resources / timelines of the property owners. If the Township of Norwich is interested in facilitating the development of this land it could examine opportunities to acquire the land to ensure such lands are available to capitalize on future demand. To attract development the land would need to be competitively priced.

The average price for serviced industrial (employment) land in Tillsonburg is $26,500 per acre while the average price in Ingersoll is $35,000 per acre (Oxford County Economic Strategy, Dec. 2006. p.12). Although specific data for Delhi is unavailable, the average price for serviced industrial land in Norfolk County is $26,500 per acre (Norfolk County Economic Development – Community Profile. 2007. p.2).

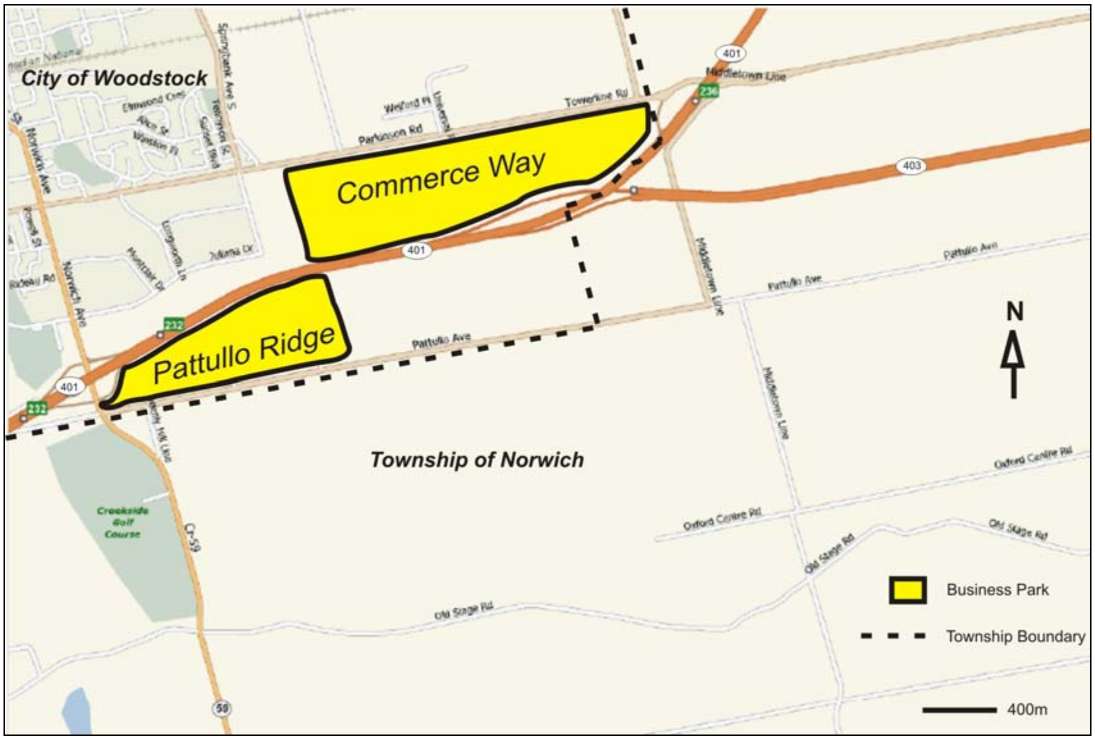
In contrast, the average price per acre for serviced industrial land in the City of Woodstock is considerably higher. Woodstock has two business parks situated along the northern boundary of the Township of Norwich:

- Pattullo Ridge Business Park is located immediately adjacent to Highway 401 and between Highway 403 and County Road 59 North. This business park features lots ranging from 2 to 12 acres and the cost per acre ranges from $45,000 to $85,000, depending on lot size and highway exposure.

- Commerce Way Business Park features almost 270 acres of industrial land at the intersection of Highways 401 and 403. Development lots from 1 acre to 100 acres are available for purchase from the City of Woodstock with prices ranging from $70,000 to $100,000 per acre with the higher price being attached to lots with Highway 401 frontage. The business park is located at the intersection of Highways 401 and 403 and is visible from both roads. The business park is located half way between Toronto and Detroit and nearly 70,000 vehicles per day pass by the building lots that front Highway 401 (City of Woodstock – Dec. 2007. www.woodstocknow.com/index.php?menu_id=2107).

Map 11 shows the location of the Patullo Ridge and Commerce Way business parks which are situated adjacent the northern boundary of the Township of Norwich.

Map 11: Business Parks in the City of Woodstock Near the Township of Norwich Boundary



Source: Adapted from the City of Woodstock – Dec. 2007. www.woodstocknow.com/index.php?menu_id=2107

3.10 Impact of the New Toyota Plant in Woodstock

A brief profile of the recent establishment of the Toyota facility in the City of Woodstock is provided below as an example of how the introduction of one major development can impact the local and regional economy.

In June 2005 Toyota Motor Manufacturing announced that it was establishing a new assembly plant in the City of Woodstock. Initially Toyota announced that it was investing $800 million in the plant with annual planned production of 100,000 RAV4 sports utility vehicles. Once fully operational in 2008 the development would support 1,300 full time jobs. Then in early 2006 Toyota announced that it was increasing its total investment in the Woodstock facility to $1.1 billion to increase its flexibility to build more vehicles in North America. The added investment will serve to increase total annual production to 150,000 vehicles and add another 700 jobs bringing the total workforce at the Woodstock facility to 2,000 (Kitchener Record. Dec. 20, 2007).

The establishment of the Toyota plant in Woodstock represents the first Greenfield investment for an assembly plant in Ontario in over a decade. One of the key factors that influenced Toyota's decision to locate in Woodstock included its proximity to Toyota Motor Manufacturing Canada in nearby Cambridge which affords both Toyota entities enhanced productivity opportunities such as sharing staff and attracting potential suppliers (Trade and Industry Development. 2006. www.tradeandindustrydev.com/issues/id-138-article.aspx).[26]

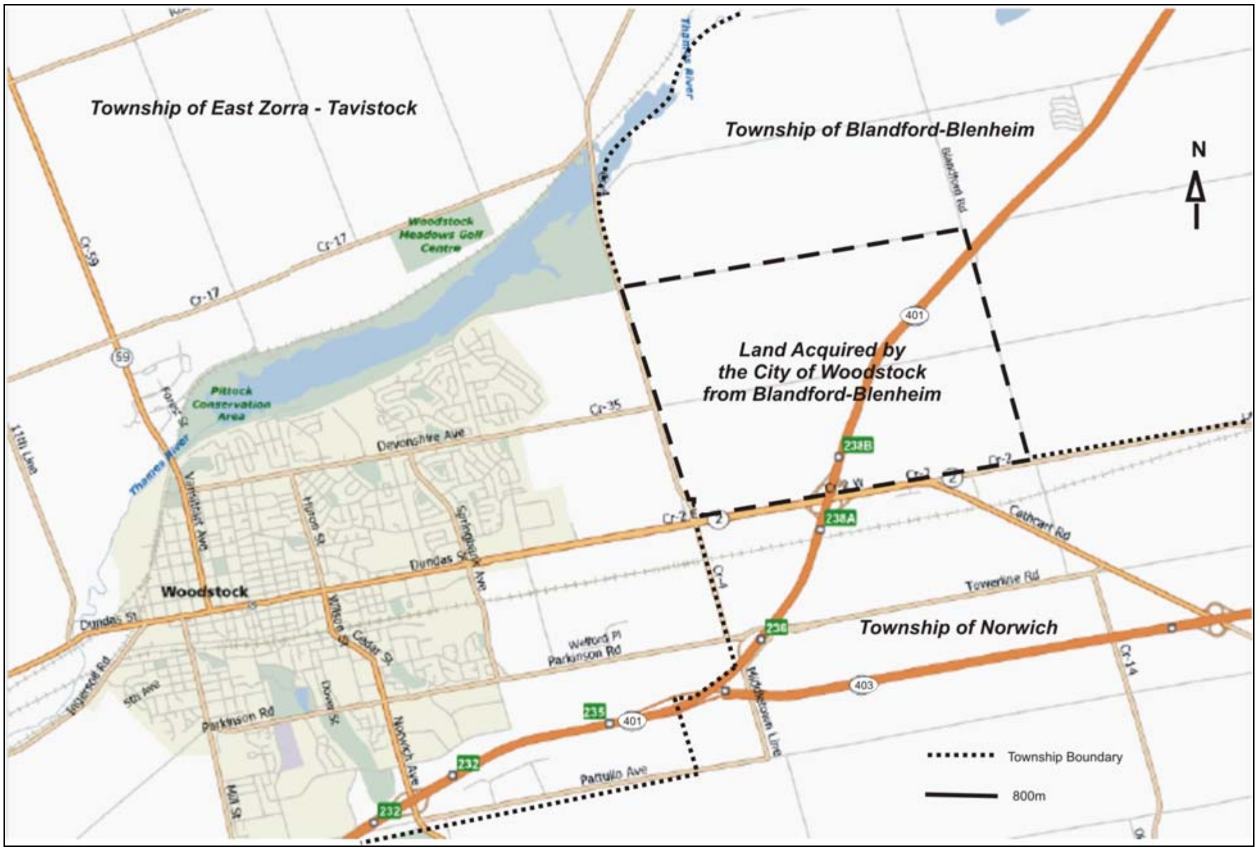
Toyota executives were also very interested in how the Woodstock facility would blend with the community and they were impressed with the welcoming and forthcoming spirit of the various stakeholders to make the project a reality. Toyota was pleased with the efforts of officials from Woodstock and Oxford County, who not only facilitated the purchase of the necessary land but also maintained their confidentiality agreement, even in the face of heavy rumors looking for confirmation (Site Selection. Sept. 2005. www.siteselection.com/issues/2005/sept/p524/pg02.htm).

The development was facilitated through a boundary adjustment when the City of Woodstock acquired approximately 1,270 ha (3,140 acres) of land from the Township of Blandford-Blenheim in 2005.[27] The new Toyota assembly plant is being constructed on almost 1,000 acres of this site, west of Highway 401. Map 12 shows the area of land that was acquired by the City of Woodstock to accommodate the construction of the new Toyota plant.

[26] The Woodstock land parcel will be two-and-a-half times larger than the one that is home to the Cambridge facility. The Cambridge plant is the only plant outside Japan that makes vehicles for Lexus and it also makes Corollas and the Matrix crossover SUV. It has seen annual capacity grow from 50,000 vehicles to 288,000 vehicles by 2004 (Site Selection. Sept. 2005. www.siteselection.com/issues/2005/sept/p524/pg02.htm).

[27] Pulling the land together was challenging as more than 25 landowners were involved and some of the farms had been in families for generations (Site Selection. Sept. 2005. www.siteselection.com/issues/2005/sept/p524/pg02.htm).

Map 12: Area of Land Acquired by the City of Woodstock from Blandford-Blenheim Township



Source: Adapted from the County of Oxford Official Plan (Schedule N-1, W-1, B-1) 2005.

Other key factors that influenced Toyota's decision to locate at the Woodstock site included the close proximity of Highways 401 and 403 as many parts will be coming up the I-75/Hwy 401 corridor from Michigan, Ohio, Kentucky and Tennessee. Additional key criteria included access to a regional skilled labour pool, power availability, water systems and dual rail, which the new site will see from CN and Canadian Pacific (Site Selection. Sept. 2005). The development was also facilitated by the City of Woodstock Economic Development Department, the Province of Ontario, and the Federal Government.[28]

Toyota will be hiring the bulk of the 2,000 workers it needs in 2008 to accommodate its expansion and almost 50,000 job applications have been processed through an on line application site (Kitchener Record. Dec. 20, 2007).

The establishment of the Toyota facility in Woodstock is having an effect on local industrial land values and land availability. As noted in the Kitchener Record (Dec. 20,

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[28] The Province of Ontario provided incentives valued at US $56.3 million while the Federal Government provided incentives valued at US $44.2 million (Site Selection. Sept. 2005. www.siteselection.com/issues/2005/sept/p524/pg02.htm).

2007), parcels of land that were on the market for months with asking prices in the hundreds of thousands of dollars and are now selling in a matter of weeks for prices in the millions. As well, more than 200 acres of the industrial park where the Toyota facility is located is now occupied by parts makers that will supply the plant. Additionally, a developer has started building two office complexes in the City's third industrial park on speculation on a continuing influx of business coming into the city (Kitchener Record. Dec. 20, 2007).

With respect to housing, within a month of the announcement by Toyota that it would build in Woodstock, the assessed price of houses in Woodstock rose by 20% and home prices have steadily risen with some new homes fetching between $300,000 and $350,000 (Kitchener Record. Dec. 20, 2007).

In terms of infrastructure improvements, the establishment of the Toyota facility and related development resulted in a $40.8 million investment by the provincial government to widen Highway 401 in the Woodstock area. The widening of Highway 401 between Highway 403 and Oxford Road 2 will provide easier and safer access to the new Toyota plant and improve traffic flow for local residents and future workers (Economic Developers Association of Canada EDAC. Volume 2, Issue 26. March-April, 2007. p.17).

With respect to rail service, Canadian Pacific reached a long-term agreement with Toyota in June 2006 to provide a direct railway connection to the new Toyota plant by proposing to construct, operate, and maintain the Toyota Woodstock Spur, to connect the plant to CP's Galt Subdivision, its main line between Toronto and Detroit. This development will also result in the construction of two new at-grade crossings (at Township Roads 3 and 4) which will both be equipped with automated warning systems (Canadian Transportation Agency. Feb. 2007. www.cta-otc.gc.ca/rulings-decisions/decisions/2007/R/55-R-2007_e.html).

The benefits derived from the Toyota development are expected to extend to all parts of Oxford County. As noted by the Warden of Oxford County Don Woolcott in 2005, the new Toyota plant "will pay dividends to all of the residents of Oxford County. The plant will generate significant property tax dollars which will lighten the burden on the homeowner; it will create both direct and indirect employment for residents of the County; and additional business for all areas of the economy. Millions of dollars are expected to be injected annually into the local economy for non-production spending associated with the types of goods and services required to support a facility of this size" (Economic Developers Council of Ontario. June 30, 2005. www.edco.on.ca/en/success_stories.asp).

Mayor Michael Harding of the City of Woodstock also noted that the investment by Toyota will translate into many millions of dollars in tax revenue annually for the City, the County and the Township of Blandford-Blenheim (Woodstock Sentinel Review. Feb. 8, 2006).

3.11 Land Development Potential in Other Areas of the Township

Land Adjacent to the City of Woodstock

Land located in the northern part of the Township of Norwich that is situated along the 401 and 403 transportation corridor represents an ideal location for industry. As shown in Map 13, the boundary of this land area is roughly defined by County Road 2 (formerly Highway 2) in the north, Muir Line in the east (Township Boundary with the County of Brant), Highway 403 in the south, and County Road 4 in the west.

With its close proximity to existing industrial land uses in the City of Woodstock (Commerce Way Business Park, Patullo Ridge Business Park, and the lands recently annexed by Woodstock for the Toyota site, etc.) this area represents a logical extension of the Woodstock urban area. As well, the established water and wastewater infrastructure along the Woodstock/Township of Norwich boundary should facilitate greater options/capacity for extending water and waste water services to the lands in the Township of Norwich.

The current land use designation within this area is predominantly Agricultural Reserve (agricultural, rural residential uses). The area also features provincially significant wetlands between Muir Line and County Road 55 (formerly Highway 53) including lands managed by the Grand River Conservation Authority.

As a further indication of the development potential associated with this land, a section of the area that is directly adjacent to the City of Woodstock has already been designated in the County of Oxford Official Plan for Future Urban Growth (the area is bound by Highway 401, County Road 2, and County Road 4).[29] The Official Plan calls for this land to be developed with a mix of business, industrial and service commercial land uses (Section 4.2.2.6).[30]

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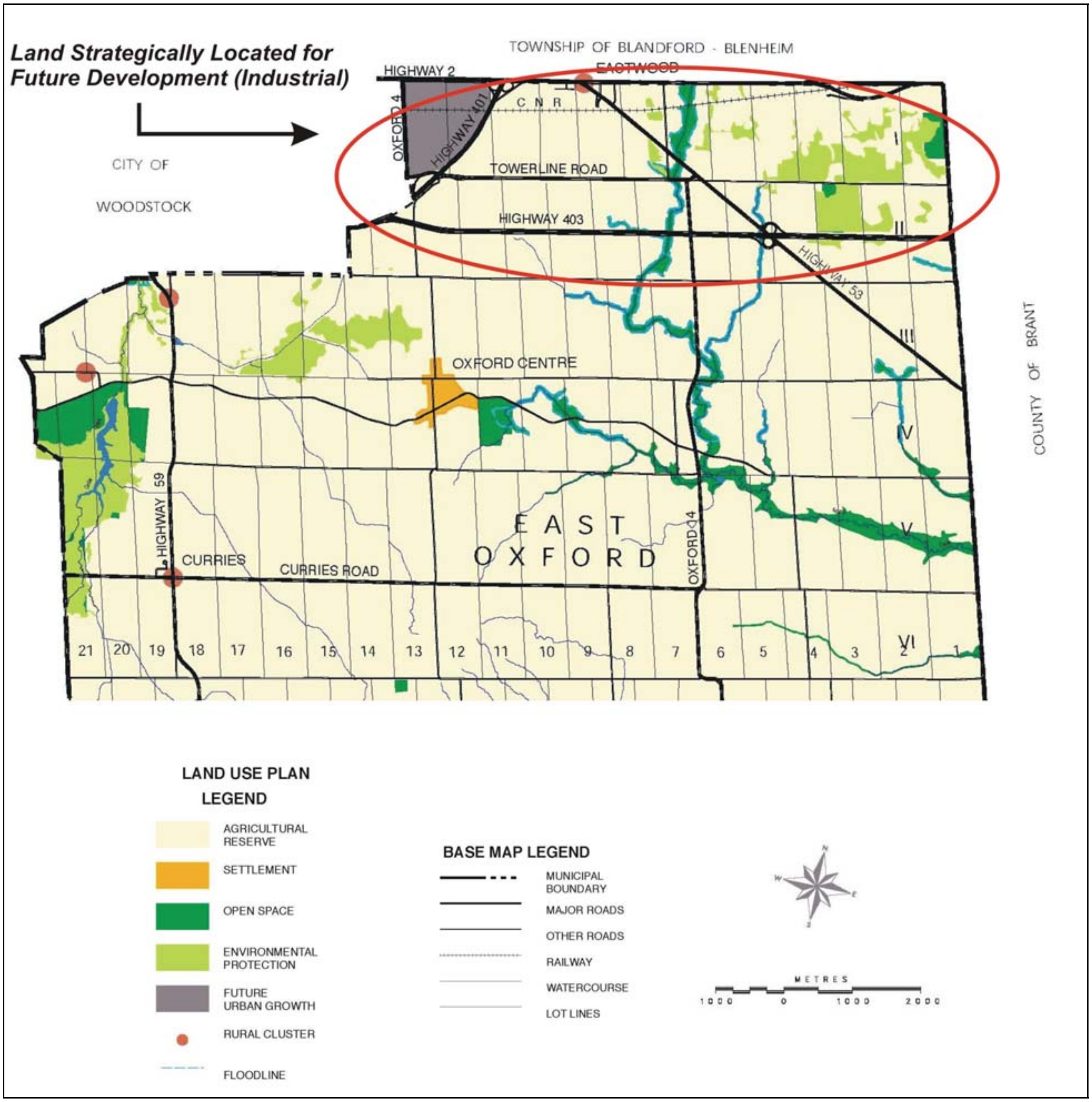
[29] Lands designated as "Future Urban Growth" in the Official Plan are also capable of being fully serviced and are anticipated to be required to accommodate urban development during the planning period of the County Plan and beyond (Section 4.2.2.6). Until such time as lands designated for Future Urban Growth are developed in accordance with the policies of the Plan, it is intended that vacant undeveloped lands will be utilized for agricultural uses of a non-intensive nature or scale of operation in accordance with the policies of Section 3.1.4 (Section 4.2.2.6.4). The Future Urban Growth area in the Township of Norwich has a total area of approximately 90 hectares, 75% of which could be developed for industrial purposes (MHBC Planning Ltd. Sept. 2006. p.14).

[30] The Plan also notes the requirement that Future Urban Growth lands intended for a mixture of industrial and commercial uses have to be incorporated within the adjacent urban municipality by municipal boundary adjustment prior to development. Lands intended for business uses which are substantially developed or which are developed in accordance with the policies for large-scale business uses may be permitted to remain or further develop through inter-municipal servicing agreements between the County and the affected Area Municipality (Section 4.2.2.6.2).

Map 13: Lands Adjacent to the City of Woodstock with Development Potential



Source: Adapted from County of Oxford Official Plan. Schedule “N-1”. 2005.

Land Adjacent to the Town of Tillsonburg

Land located in the southwest corner of the Township of Norwich borders the Township of South-West Oxford and the Town of Tillsonburg. The area for potential development in the Township of Norwich extends from Cornell Road in the north to the boundary with the County of Norfolk in the south (Map 14). The area is bisected east-west by Big Otter Creek.[31] The current land use designation within this area is predominantly Agricultural Reserve (agricultural, rural residential uses). The area also features Significant Valleylands associated with Big Otter Creek which are environmentally protected.

Across the boundary in the Town of Tillsonburg the land is designated as Residential with some Commercial activity permitted along Simcoe Street (County Road 51) which slightly cuts across south-west corner of the Township.

Across the boundary in the Township of South-West Oxford a narrow strip of land is designated for Future Urban Growth (this strip of land extends a short distance west where it meets another portion of the Town of Tillsonburg boundary). The Official Plan calls for this land to be developed for residential uses (Section 4.2.2.6).[32]

The most compatible type of future development for this part of the Township of Norwich would be residential uses perhaps with limited commercial activity and open space given the extent of existing and planned residential use on the adjacent lands and the presence of Big Otter Creek.

Most of the industrial designated land in the Town of Tillsonburg is located further south of the southern boundary of the Township of Norwich, along Highway 3.

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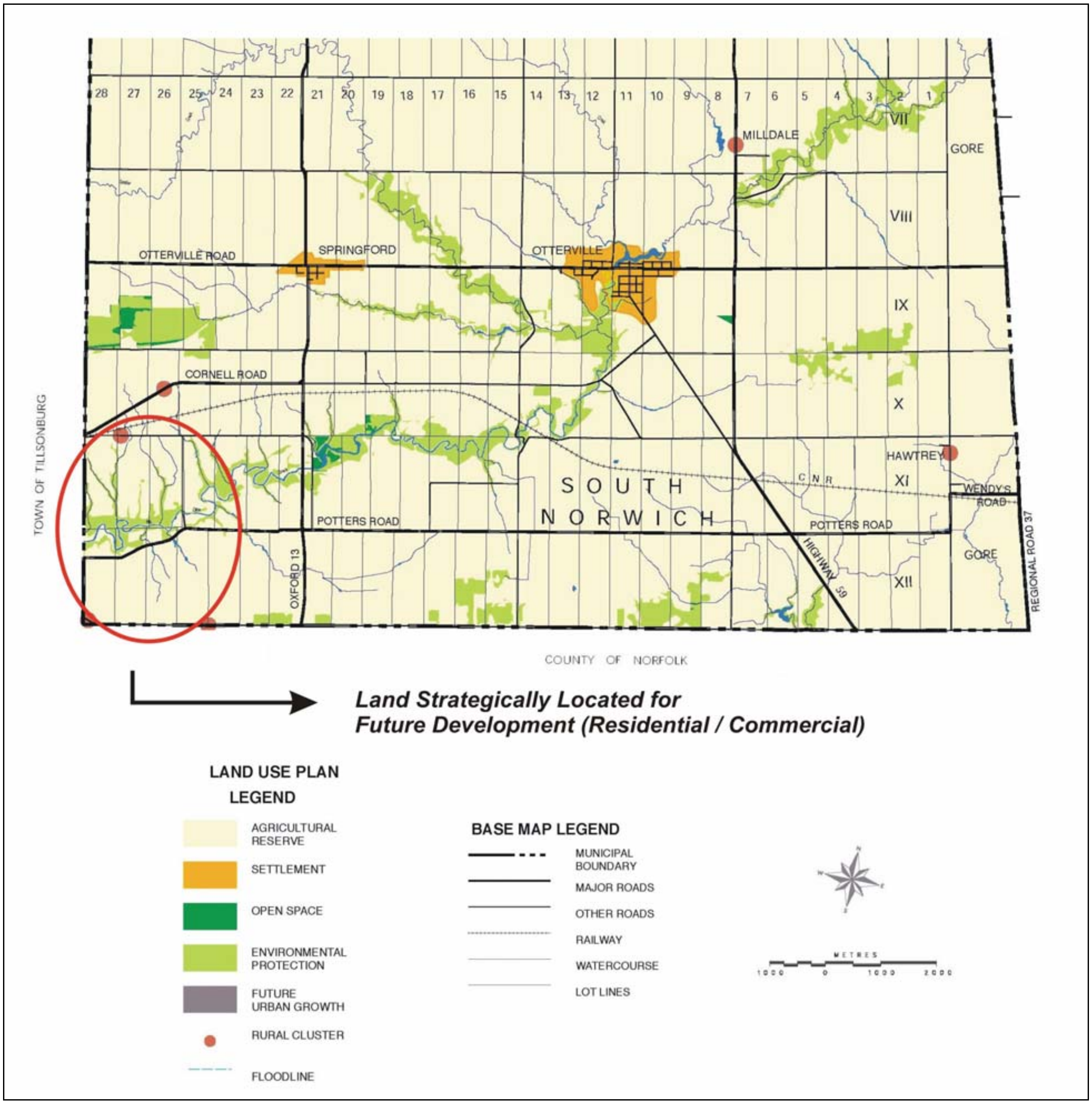
[31] The western boundary with the Town of Tillsonburg extends south from Big Otter Creek while the western boundary with the Township of South-West Oxford extends north of Big Otter Creek – approximate.

[32] The Plan also notes the requirement that Future Urban Growth land intended for residential development has to be incorporated within the adjacent urban municipality by municipal boundary adjustment prior to development (Section 4.2.2.6.2).

Map 14: Lands Adjacent to the Town of Tillsonburg with Development Potential



Source: Adapted from County of Oxford Official Plan. Schedule "N-1". 2005.

Planning Policy Framework

Both of the areas outlined above contain considerable tracts of land designated as Agricultural Reserve along with portions designated as Environmental Protection. This has implications for the availability of these lands for development based on guidelines in the Provincial Policy Statement (2005) and the County of Oxford Official Plan (2005).

The Provincial Policy Statement (PPS) requires that prime agricultural areas be protected for long-term use of agriculture.[33] Although policy 2.3.5.1(a) of the PPS allows planning authorities to exclude land from prime agricultural areas for expansions of settlement areas, a comprehensive review is required to ensure that

> *"1. the lands do not comprise specialty crop areas;*
> *2. there are no reasonable alternatives, which avoid agricultural areas; and,*
> *3. there are no reasonable alternatives on lower priority agricultural lands in prime agricultural areas" (Policy 1.1.3.9)*

Given that the County of Oxford is almost entirely made up of primary agricultural areas, there are very limited alternatives for appropriately located employment lands in the area (MHBC Planning Ltd. Sept. 2006. p.7).

The County of Oxford Official Plan also contains a number of policies to safeguard agricultural resources throughout the County. The Plan identifies and protects lands designated as "Agricultural Reserve" for agricultural and resource extraction uses, and particularly, farming uses. A justification analysis is mandatory for amendments to the Plan to permit the establishment of non-agriculturally related uses in the Agricultural Reserve designations (Section 3.1.6). The analysis requires that the following considerations be addressed:

- *"There is a demonstrated need for additional land to be designated given the nature and capacity of underdeveloped land use designations with the nearby designated settlement based on population, household and labour force projections for the Area Municipality and land use density factors for the planning period of this Plan.*
- *The nature of the proposal and whether the use requires special locational requirements.*
- *The amount of land proposed for any proposed settlement extension is justified considering population, household and labour force projections for the Area Municipality and land use density factors for the planning period of this Plan.*
- *Any land proposed for settlement extension is a logical expansion of the settlement.*
- *The long-term suitability and feasibility of the proposed site for centralized waste water and/or water facilities or private water and private septic systems is demonstrated to the satisfaction of the County and the Board of Health.*
- *The land proposed for the settlement extension or proposed use will not be classified as Class I to III agricultural land if suitable alternative locations of less agricultural capability exist."*

[33] The PPS defines prime agricultural land as specialty crop areas and/or Canada Land Inventory 1, 2 and 3 soils. A specialty crop includes crops such as tender fruits (peaches, cherries, plums) grapes, other fruit crops, vegetable crops, and crops from agriculturally developed organic soil lands.

The Official Plan also includes environmental resource policies. Under Section 3.2, the Plan encourages the protection of areas designated Environmental Protection and Open Space, and prohibits uses within or adjacent to such areas that are incompatible with this objective.

With respect to the growth of rural settlements, the Official Plan promotes the location of non-agricultural uses within rural settlements as a means of protecting agricultural lands and natural areas, avoiding scattered and strip development and maximizing the efficiency of municipal services where they exist (Section 6.1).

In general, the policies outlined above are intended to direct growth to serviced settlement areas such as Woodstock, Ingersoll, Tillsonburg and the Village of Norwich. This leaves the Township of Norwich with the dilemma of having to try and promote / accommodate development in the face of several challenges. Although the Official Plan allows for a variety of industrial uses in Serviced Villages, development in the serviced areas of the Township of Norwich is constrained by limited wastewater capacity and limited control over employment lands that are privately owned.[34]

Future Urban Growth Lands and Municipal Boundary Adjustments

New development activities are typically attracted/directed to larger urban centres such as Woodstock, Ingersoll and Tillsonburg which have a greater availability of land for development and ensure choice and flexibility in size, configuration, and location. As well, larger municipalities typically own a supply of their development lands which provides better control over the availability and value of lands and enables them to remain competitive, meet market demands and promote economic development.

In order to accommodate the Toyota development project, the City of Woodstock incorporated a 3,140 acre parcel of land from the Township of Blandford-Blenheim via a municipal boundary adjustment. This large scale industrial development should be viewed as an exceptional case as it represented a significant economic opportunity for both the County of Oxford and the Province of Ontario and required significant support from the County and the Province to assemble the subject lands.

While it may be tempting to think of the development activity that could potentially expand eastward along Highway 403 beyond the boundary of the Future Urban Growth area, there does not appear to be a significant development project that would justify the re-designation of these lands at this time. It is also worth noting that the municipal boundary adjustment for the Toyota project was not expected to set a precedent for similar development proposals in the future (County of Oxford By-Law No. 4608-2005. Section 3.0).

[34] Permitted industrial uses include assembling, manufacturing, fabricating, processing, repair activities, environmental industries, wholesaling, storage and warehousing industries, construction industries, communication, logistic and utility industries, transportation and cartage industries, and technological service industries (Section 6.4).

4.0 Key Findings

A number of key findings emerged from the 3 economic development research studies that were completed for the Township of Norwich (Economic Baseline, SWOT Analysis, Competitive Analysis). In particular, our analysis reveals that:

- The population of the Township has experienced a slight decline over the past decade but has stabilized in recent years.

- The population of the Township has experienced an increase in overall level of education, particularly in the area of trade school graduates.

- The Township has a lower unemployment rate and lower incidence of poverty compared to neighbouring municipalities and the province as a whole.

- The Township has a strong export based economy. Agriculture and manufacturing continue to be the largest employment sectors in the Township accounting for almost 40% of the total employment. However, in recent years both of these sectors experienced job losses while the construction sector experienced substantial job growth.

- The Township is highly specialized in agriculture, transportation and warehousing, and construction industries.

- Farms in the Township are increasing in average size through farm consolidation but are still smaller than the County and provincial average. The Township is specialized in field crop, hog, and dairy production and is becoming increasingly specialized in hog and dairy production.

- The net revenue per acre of farmland in the Township in 2000 was more than double the provincial average. However, farm revenue values in the Township are likely to be negatively impacted by the continuing decline in local tobacco production (the result of federal and provincial government policies) and the high value of the Canadian dollar which is impacting exports of certain agriculture commodities to the U.S. This will be verified with the 2006 Census data.

- In recent years resident employment has increased in occupations related to management, trades, transportation, and equipment operators.

- Over half of the resident labour force commutes to employment opportunities outside the Township – the majority of these residents work within the County of Oxford.

- The resident labour force is likely to experience more employment opportunities with the growth of the auto sector industry in Ingersoll and Woodstock.

- Compared to select neighbouring municipalities, the Township is competitive in a range of site selection factors including:
    - proximity to major road, rail, air, and marine transportation corridors
    - proximity to major manufacturing regions and consumer markets
    - housing prices
    - proximity to colleges and universities
    - community based elementary and secondary schools
    - municipal tax rates
    - development charges and building permit fees

- Compared to the Township of Guelph/Eramosa, the Township of Norwich is less competitive in relation to municipal tax rates, development charges, and building permit fees.

- The status of Norwich District High School (NDHS) is currently under review in light of declining enrolment. The loss of the high school will have social and economic implications for the Township including the loss of local employment opportunities for teachers (and the jobs these positions support in the wider economy), loss of local retail activity, and loss of local work opportunities / experience for students participating in the NDHS co-op program. The loss of the school would also make the area less attractive for newcomers and other families with high school age children.

- The Township is relatively well serviced with respect to broadband connectivity although some rural areas of the Township continue to rely on dial up service.

- The Village of Norwich is the only fully serviced (water and wastewater) community in the Township. However, the wastewater treatment system is reaching its capacity which will restrict the development of 'wet' industries.

- The growth of the industrial base in the Township is limited by the availability of employment land. The vacant industrial lands in the serviced villages are privately owned and the future development of these lands is contingent on the interests of the property owners.

- Future Urban Growth lands adjacent to the City of Woodstock represent lands that are designated for future development and are capable of being fully serviced.

- Business interests in the Township are generally dissatisfied with the quality of service provided by Township and County government officials as it relates to business/economic development matters.

- Business interests in the Township see the value in having a dedicated official such as an Economic Development Officer champion local business and economic development interests.

5.0 Recommendations

The following recommendations have been developed in reference to the results of the Economic Baseline study, the SWOT Analysis study, and the Competitive Analysis study.

Issue:
The Township lacks a formal economic development strategy. There has been considerable frustration felt by residents and Township officials alike in dealing with matters related to development. This report along with other community research activities including the recent BR&E study and the ongoing Community Visioning Process will contribute to the creation of an economic development strategy being developed by the Township. This process can also be an opportunity for residents and Township officials to become better informed about economic development policies and guidelines and areas of Township/County/Provincial jurisdiction as it relates to the planning and development decision making process.

> ***It is recommended that the Township incorporate initiatives in its economic development strategy to enable Township officials and residents to become better informed about Township/County/Provincial planning/development policies and better prepared in responding to inquiries and meeting application requirements.***

Issue:
The Township of Norwich is at a competitive disadvantage with respect to the availability of employment lands. Vacant industrial lands are currently in the hands of private owners which severely limits the ability of the Township to plan for and promote development activity.

> ***It is recommended that the Township plan for the acquisition of employment lands and/or strive to reach an understanding/agreement with private land owners to facilitate the development of the employment lands.***

Issue:
Current wastewater treatment capacity in the Township limits the type of industrial activity that can be expanded and/or attracted to the Village of Norwich. Given the amount of agricultural activity in the region there may be additional small and medium agricultural processing opportunities that could be accommodated on the existing employment lands. However, wastewater limitations would restrict development to operations with low water requirements.

> ***It is recommended that the Township continue to seek the cooperation and participation of the County in advancing the planning and expansion of the existing wastewater system.***

Issue:
Municipalities are increasingly relying on Economic Development Officers (EDO) to help facilitate the development process and remain competitive. The EDO can facilitate the process of bringing different stakeholders together to discuss development ideas and use the existing attributes of a community to create an environment in which investment can take place. The challenge for small communities in establishing and maintaining an EDO position is cost. One possible strategy for addressing this challenge is to partner with other municipalities and share the cost of employing a dedicated EDO. A partnership approach to rural economic development is promoted in the recommendations contained in the recent Economic Base Analysis and Rural Development Study (Matthew Fischer and Assoc. Inc. April 20, 2006).

> ***It is recommended that the Township determine the interests of the County of Oxford and the other 4 rural municipalities in the County in pursuing a Rural Development Program as laid out in the Rural Development Strategy.[35] A key element of the development strategy, regardless of the organizational structure, is commitment to a sufficient timeframe that will allow the program to realize results (e.g. 3-5 years).***

Issue:
Business planning, networking and marketing is viewed by many businesses in the Township as a part of remaining competitive. Businesses have indicated a strong interest in participating in networking and information sessions related to issues such as labor force planning, marketing, and enhancing customer service skills.

> ***It is recommended that the Township work in conjunction with local business organizations such as the Chamber of Commerce and BIA in facilitating the development/coordination/delivery of business networking and information sessions.***

[35] The Rural Development Program as described in the Rural Development Strategy proposes to hire a Rural Development Officer to implement the program and report to a committee of stakeholders. Several scenarios are presented for funding the Rural Development Program including 100% funding by the County; 50/50 partnership with the County and the participating rural municipalities; equal partnership of the 5 rural municipalities; coalition of those municipalities committed to the Program (p.25).

Issue:
Although employment in the agriculture sector is declining, it still ranks as the number one employment sector in the Township directly accounting for over 20% of all jobs. Furthermore, the agriculture sector indirectly supports a substantial number of jobs in local businesses that supply farm inputs (e.g. farm equipment, feed supplies, hardware, fuel, etc.).[36] While farm productivity is increasing, Ontario farmers are continuing to experience a farm income crisis as farm operating costs outpace farm revenues resulting in the lowest farm net incomes in years.[37] Increasingly, farmers are finding it necessary to rely on off-farm employment or farm based businesses to support their farm operation.

> ***It is recommended that the Township work in conjunction with the County in examining and implementing strategies to promote/enable farm based business activity.***

Issue:
Retail represents the third largest employment sector in the Township and many of the stakeholders we spoke with reported that the Township features a good mix of retail businesses. However, there is concern that the local retail sector could quickly deteriorate if the business community fails to respond to consumer interests and trends. Potential programs and services that could aid in ensuring the continued presence of these businesses include business directories/brochures/maps, physical improvements to public areas, and retail and special event coordination.

> ***It is recommended that the Township work in conjunction with the retail sector in developing a retail marketing strategy.***

[36] Our assessment of the agriculture sector in 2000 determined that the agriculture sector in Oxford County has an employment multiplier of 2 (Harry Cummings and Associates. Oct. 2000. p.68).
[37] Ontario producers saw their realized net income hit its lowest level since 2003. Rising interest, wage and fuel costs, together with falling hog receipts and program payments, more than offset increases in revenue from crops and cattle (Statistics Canada. Agriculture Economic Statistics. Nov. 2007).

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Appendices

Appendix A – Municipal Government and Spheres of Jurisdiction

The County of Oxford is a two tier municipality. The County is the upper-tier municipality while the Township of Norwich along with the other four townships in the county (Zorra, East Zorra-Tavistock, Blandford-Blenheim, and South-West Oxford) and the Towns of Ingersoll and Tillsonburg, and the City of Woodstock are lower-tier municipalities. Municipal responsibilities set out under the Municipal Act and other Provincial legislation are split between the upper tier and lower tier municipalities.[38]

Oxford County has jurisdiction over the following matters:

- Highways
- Transportation systems other than highways (airports)
- Waste management[39]
- Water distribution and wastewater services[40]
- Emergency medical services[41]

With respect to planning, Oxford County is responsible for planning approval and assumes the authority, responsibility, and duty for planning related matters. The county also provides advice and assistance to the Township of Norwich in respect to planning matters.

Site Plan Approval

The Site Plan Approval process requires that the site plan application be reviewed by a County Planner to ensure that the application complies with the Zoning By-law and the policies of the Oxford County Official Plan. The County of Oxford Community and Strategic Planning Office will prepare a Planning Report which will outline the nature of the proposal and a summary of the comments received. A draft Site Plan Agreement will be prepared by County staff for the consideration of the Township Council. Council may approve, refuse or modify the application and accompanying plans. Council may also modify the terms of the recommended Site Plan Agreement. It is Council's expectation this process will take approximately 30 days from submission of a complete application to final approval by the Township (Township of Norwich Site Plan Approval Guidelines. March 7, 2006. pp.3-4). The following chart outlines the Site Plan Approval process.

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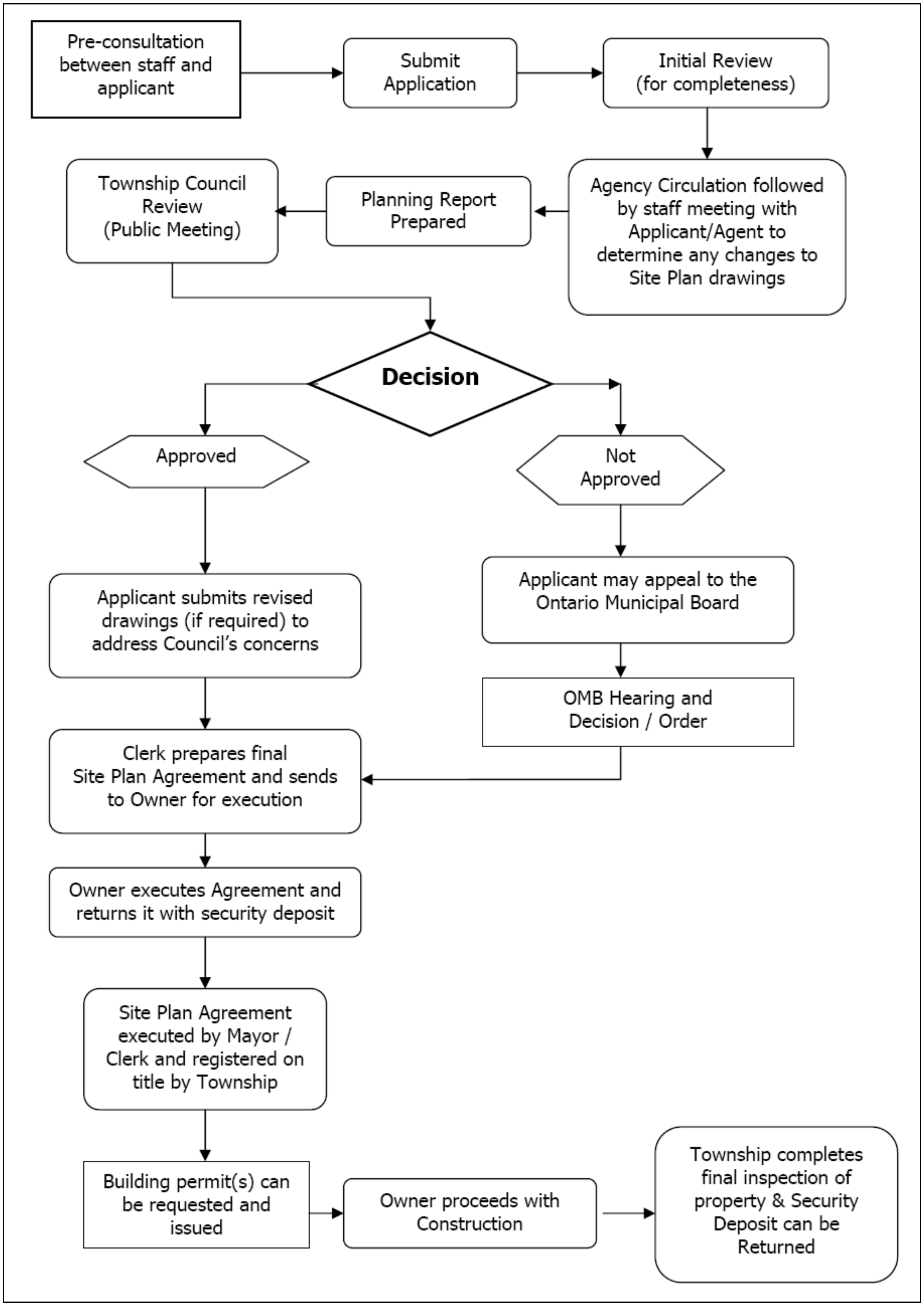
[38] In contrast the Town of Delhi is part of the single-tier municipality of Norfolk County. Norfolk County assumes all municipal responsibilities set out under the Municipal Act and other Provincial legislation.
[39] As of January 1, 2002, Waste Management became the responsibility of the County of Oxford.
[40] Since 2000, all aspects of water and wastewater services have been administered and maintained by the Oxford County Public Works Department. The department maintains plants in: Beachville (Loweville Subdivision), Bright, Brownsville, Dereham Centre, Drumbo, Embro, Hickson (King Subdivision), Ingersoll, Innerkip, Lakeside, Mount Elgin, Norwich, Otterville, Plattsville, Princeton (Countryside Manor), Springford, Sweaburg (Oxford Heights Subdivision), Tavistock, Thamesford, Tillsonburg and Woodstock.
[41] Oxford County assumed responsibility of delivery of Emergency Medical Services for the county on January 1, 2002

Township of Norwich Site Plan Approval Process



Source: Township of Norwich Site Plan Approval Guidelines. March 7, 2006.

Consent (Severance) or Consent and Minor Variance

Consent or Consent and Minor Variance applications are adjudicated by the Oxford County Land Division Committee. After accepting the completed application, the County of Oxford Community and Strategic Planning Office circulates the application to municipal officials, provincial ministries and other agencies for comment. When reviewing severance applications, Planning Office staff visit the sites and prepare reports on the planning acceptability of these applications. The public in the vicinity of the application are given a minimum of 14 days notice of a public meeting held by the Land Division Committee of Oxford County Council to consider the proposed severance. The applicant is required to attend the public meeting and present the application. The Land Division Committee approves or denies the application at a public hearing and will attach conditions to any approval. The Planning Act, 1990, as amended, provides for the applicant to appeal the decision to the Ontario Municipal Board if the Committee refuses the application [Section 53(19)] or neglects/refuses to make a decision within 90 days of receipt of a complete application [Section 53(14)].

Subdivision Approval

A Subdivision Approval in the Township of Norwich is conducted through the following process:

1. After accepting the completed application, the County of Oxford, Community and Strategic Planning Office may confer with officials of municipalities and other ministries, commissions and authorities, and with others who may be concerned, to obtain information and recommendations.
2. After an evaluation of the plan and of the recommendations from other bodies as above, conditions will be imposed in granting approval of the draft plan (approval in principle).
3. The conditions of draft approval must be fulfilled prior to the approval of the final plan. The agencies affected by the conditions must indicate, in writing, that they have been fulfilled.
4. The Planning Act provides for an appeal to the Municipal Board from a decision made by the County of Oxford.
5. Note: If the decision of this application is appealed by a third party, the Owner or Applicant agrees to support the application, provide assistance in the preparation and presentation of the application before the Ontario Municipal Board and pay all of the County's legal costs associated with the OMB hearing.

Zone Change

A Zone Change in the Township of Norwich is conducted through the following process:

1. After accepting the completed application, the county of Oxford Community and Strategic Planning Office circulates the application to Municipal Officials, Provincial Authorities and other Agencies for comment. The public in the vicinity of the application are given 20 days notice of a public meeting held by Municipal

Council to consider the requested zone change. The applicant is required to attend the public meeting to support their application.

2. Section 34(19) of the Planning Act, 1990 provides for an appeal by any person to the Ontario Municipal Board of the decision of the Council within 20 days of the giving of written notice of the passing of the By-Law.
3. Section 34(11) of the Planning Act, 1990 allows the applicant to appeal to the Ontario Municipal board if council refuses the application or neglects to make a decision within 90 days of receipt of the completed application.

Application Fees

County of Oxford - Application Fees, January 1, 2008

Type of Application	Planning Fee	Public Works Fee	Public Health Fee
Condominium	$1095.00 [a]		
Exemption from Draft Approval	$760.00		
Consent	$1665.00 [a]	$200.00 [g]	$80.00 [e]
Each additional lot	$830.00 [b]	$200.00 [g]	$80.00 [e]
Consent & Minor Variance	$1730.00 [a]	$200.00 [g]	$80.00 [e]
Each additional lot	$865.00 [b]	$200.00 [g]	$80.00 [e]
Consent or Consent & Minor Variance			
Clearance of Conditions		$100.00/lot	
Changes to Approved Conditions	$100.00		
Revised Application (major)	$300.00		
Revised Application (minor)	$150.00		
Validation Order	$545.00		
Official Plan (major)	$3675.00 [a]	$100.00	
Official Plan (minor)	$3060.00 [a]	$100.00	
Part Lot Control Exemption	$500.00		
Plus: per new part/lot (1 to 6 parts/lots) maximum (7 or more parts/lots)	$100.00 [f] $700.00 [f]		
Subdivision	$2400.00 [a]	$75.00/lot [d] Max $1500.00/subdivision	
Extension of Draft Approval	$390.00		
Changes to Draft Approval [c] (major)	$950.00 [a]		
Changes to Draft approval [c] (minor)	$475.00 [a]		
Clearance of Conditions		$75.00/lot [d] $2500.00 maximum	

[a] Plus a deposit to recover the costs for peer review of studies submitted in support of the application, as required
[b] for same owner, applicant and property
[c] includes changes to conditions
[d] Lot Definition:

- single-detached = 1.0
- semi-detached pair = 1.5
- multiple residential (more than 2 units = total number ÷ 2)

[e] if questionnaire answers 'YES' to at least 1 of the 5 questions concerning existing or proposed septic systems
[f] All lots must be exempted under one by-law
[g] For new vacant residential, institutional, commercial, or industrial lot creation
Source: County of Oxford. 2008.

Township of Norwich - Application Fees, January 1, 2008

Zone Change	$450.00
Site Plan Approval	$300.00
Site Plan Deposit fee	$2,000.00
Site Plan Amendment	$100.00
Minor Variance	$350.00
Ontario Municipal Board appeal	$300.00
Cash-in-lieu of Parkland (for new lots created by consent)	$500.00
Cash-in-lieu of Parking Application	$350.00
Cash-in-lieu of Parking (per space) changing	$1,069.75

Source: County of Oxford. 2008.

Town of Tillsonburg - Application Fees, January 1, 2008

Zone Change ($500) [a]	$650.00
Minor Variance ($250) [a]	$350.00
Site Plan Approval	$350.00
Cash-in-Lieu of Parkland (consents) per new lot created	$500.00

[a] These fees are charged in addition to initial fee for ‘after-the-fact’ applications.
Source: County of Oxford. 2008.

Town of Ingersoll - Application Fees, January 1, 2008

Zone Change	$250.00
Minor Variance	$150.00
Site Plan Approval	$265.00

Source: County of Oxford. 2008.

Appendix B – Property Tax Rates

Property Tax Rates for the Township of Norwich - 2007

Realty Tax Class	Township of Norwich Tax Rate	Oxford County Tax Rate	Education Tax Rate	Total Tax Rate
Residential / farm	0.005480	0.005230	0.002640	0.013350
Multi-residential	0.015010	0.014320	0.002640	0.031980
Commercial	0.010420	0.009940	0.020600	0.040960
Commercial vacant units / excess land	0.007300	0.006960	0.014420	0.028680
Commercial vacant lands	0.007300	0.006960	0.014420	0.028680
Industrial	0.014410	0.013750	0.029270	0.057430
Industrial vacant units / excess land	0.009370	0.008940	0.019030	0.037330
Industrial vacant lands	0.009370	0.008940	0.019030	0.037330
Farmlands	0.001370	0.001310	0.000660	0.003340
Managed forests	0.001370	0.001310	0.000660	0.003340
Pipelines	0.006900	0.006580	0.012950	0.026440

Source: Township of Norwich 2007 Tax Rates – By-Law No. 33-2007.

Special Area Tax Rates for the Township of Norwich - 2007

Realty Tax Class	Special Area Rates				
	Norwich Streetlights	Norwich Band	Burgessville Streetlights	Otterville Streetlights	Springford Streetlights
Residential / farm	0.000244	0.000013	0.000344	0.000263	0.000347
Multi-residential	0.000668	0.000037			
Commercial	0.000446	0.000025	0.000654	0.000501	0.000659
Commercial vacant units / excess land	0.000325	0.000018	0.000458		
Commercial vacant lands	0.000325	0.000018		0.000350	
Industrial	0.000641	0.000035	0.000905	0.000692	
Farmlands	0.000061	0.000003	0.000086	0.000066	0.000087

Source: Township of Norwich 2007 Tax Rates – By-Law No. 33-2007.

Property Tax Rates for Tillsonburg - 2007

Realty Tax Class	Tillsonburg Tax Rate	Oxford County Tax Rate	Education Tax Rate	Sewers Tax Rate	Total Base Rate
Residential / farm	0.007574	0.004774	0.002640	0.000318	0.015305
Multi-residential	0.020752	0.013081	0.002640	0.000870	0.037343
Commercial	0.014403	0.009079	0.020600	0.000604	0.044687
Commercial vacant units / excess land	0.010082	0.006355	0.014420	0.000423	0.031281
Commercial vacant lands	0.010082	0.006355	0.014420	0.000423	0.031281
Industrial	0.019919	0.012556	0.029270	0.000835	0.062579
Industrial vacant units / excess land	0.012947	0.008161	0.019025	0.000543	0.040676
Industrial vacant lands	0.012947	0.008161	0.019025	0.000543	0.040676
Large Industrial	0.019919	0.012556	0.029270	0.000835	0.062579
Large Industrial vacant units / excess land	0.012947	0.008161	0.019025	0.000543	0.040676
Farmlands	0.001893	0.001194	0.000660	0.000079	0.003826
Farmlands Dev Ph 1	0.003408	0.002148	0.001188	0.000143	0.006887
Pipelines	0.009537	0.006012	0.012953	0.000400	0.028902

Source: Town of Tillsonburg 2007 Tax Rates – Schedule "A" to By-Law No. 3260.

Additional Tax Rates for Tillsonburg - 2007

Realty Tax Class	Parking Rate	B.I.A. Rate	Total Tax Rate
Residential / farm	0.001415		0.016721
Multi-residential	0.003878		0.041221
Commercial	0.002692	0.001596	0.048975
Commercial vacant units / excess land	0.001884	0.001118	0.034283
Commercial vacant lands	0.001884	0.001118	0.034283
Industrial			0.062579
Industrial vacant units / excess land			0.040676
Industrial vacant lands			0.040676
Large Industrial			0.062579
Large Industrial vacant units / excess land			0.040676
Farmlands			0.003826
Farmlands Dev Ph 1			0.006887
Pipelines			0.028902

Source: Town of Tillsonburg 2007 Tax Rates – Schedule "A" to By-Law No. 3260.

Property Tax Rates for Ingersoll - 2007

Realty Tax Class	Ingersoll Tax Rate	Oxford County Tax Rate	Education Tax Rate	Total Tax Rate	B.I.A. Rate
Residential / farm	0.007202	0.005228	0.002640	0.015070	
Multi-Residential	0.019733	0.014324	0.002640	0.036697	
Shopping Centre	0.013696	0.009942	0.020600	0.044239	0.002214
Commercial	0.013696	0.009942	0.020600	0.044239	0.002214
Commercial Excess Land	0.009587	0.006960	0.014420	0.030967	0.001550
Commercial Vacant Land	0.009587	0.006960	0.014420	0.030967	0.001550
Industrial	0.018941	0.013749	0.029270	0.061959	0.003062
Industrial Excess Land	0.012311	0.008937	0.019025	0.040274	0.001990
Industrial Vacant Land	0.012311	0.008937	0.019025	0.040274	
Large Industrial	0.018941	0.013749	0.029270	0.061959	
Large Industrial Excess Land	0.012311	0.008937	0.019025	0.040274	
Farmlands	0.001800	0.001307	0.000660	0.003767	
Farmland (1) under development	0.003241	0.002353	0.001188	0.006781	
Pipeline	0.009069	0.006583	0.012953	0.028605	

Source: Town of Ingersoll 2007 Tax Rates.

Property Tax Rates for Delhi - 2007

Realty Tax Class	Norfolk County Tax Rate	Education Tax Rate	Total Tax Rate
Residential	0.011318	0.002640	0.013958
Residential PIL Shared	0.011318	0.002640	0.013958
Multi-Residential	0.019160	0.002640	0.021800
Shopping Centre	0.019160	0.019358	0.038518
Shopping Centre Excess Land	0.012837	0.012970	0.025807
Commercial	0.019160	0.019358	0.038518
Commercial Full PIL Shared	0.019160	0.019358	0.038518
Commercial VL Full PIL T-O-P	0.012837	0.012970	0.025807
Commercial Excess Land	0.012837	0.012970	0.025807
Commercial Vacant Land	0.012837	0.012970	0.025807
Office Building	0.019160	0.019358	0.038518
Office Building Excess Land	0.012837	0.012970	0.025807
Industrial PIL Shared	0.019160	0.026298	0.045458
Industrial	0.019160	0.026298	0.045458
Large Industrial	0.019160	0.026298	0.045458
Industrial Excess Land	0.012837	0.017620	0.030457
Industrial Vacant Land	0.012837	0.017620	0.030457
Large Industrial Excess Land	0.012837	0.017620	0.030457
Farmlands	0.002829	0.000660	0.003489
Managed Forests	0.002829	0.000660	0.003489
Pipeline	0.016857	0.017893	0.034750

Source: Norfolk County 2007 Tax Rates – By-Law No. 2007-136.

Property Tax Rates for the Township of Guelph/Eramosa - 2007

Realty Tax Class	General Tax Rate	Wellington County Tax Rate	Education Tax Rate	Total Tax Rate
Residential	0.002659	0.007302	0.002640	0.012601
Multi-Residential	0.005319	0.014603	0.002640	0.022562
Managed Forest	0.000665	0.001825	0.000660	0.003150
Pipeline	0.005399	0.014825	0.020229	0.040453
Farm	0.000665	0.001825	0.000660	0.003150
Commercial Occupied	0.003616	0.009930	0.013197	0.026743
Commercial Vacant Units	0.002532	0.006951	0.009238	0.018720
Commercial Vacant Land	0.002532	0.006951	0.009238	0.018720
Industrial Occupied	0.006499	0.017845	0.023658	0.048003
Industrial Vacant Units	0.004225	0.011599	0.015378	0.031202
Industrial Vacant Land	0.004225	0.011599	0.015378	0.031202
Large Industrial	0.006499	0.017845	0.023658	0.048003

Source: Township of Guelph/Eramosa 2007 Tax Rates.

Streetlight Tax Rates for Communities in the Township of Guelph/Eramosa - 2007

Streetlight Area		Tax Rate
1.	Ricenberg	0.000068
2.	Hartfield	0.000212
3.	Kainehill	0.000086
4.	Woodfield	0.000145
5.	Edgehill	0.000169
6.	Huntington	0.000171
7.	BMW/Pidel	0.000185
8.	Ariss Glen	0.000129
9a)	Rockwood-Res/Farm	0.000135
9b)	Rockwood-Multi-res	0.000270
9c)	Rockwood-Commercial	0.000184
10.	Walkerbrae	0.000316
11.	Ellenville	0.000045
12a)	Eden Mills-Res/Farm	0.000139
12b)	Eden Mills-Commercial	0.000188
13.	Ariss Valley	0.000202

Source: Township of Guelph/Eramosa 2007 Streetlight Tax Rates.

Appendix C – Development Charges

Development Charges for the Township of Norwich – 2007

Service	$ / Residential Dwelling Unit				Non-Residential [a]
	Single and Semi-detached	Apartment 2 Bedroom and Larger	Apartment Bachelor and 1 Bedroom	Other Multiples	$ / square foot of floor area
Township of Norwich					
General Government	112.59	54.59	40.94	78.47	0.02
Fire Services	535.44	259.62	194.71	373.19	0.12
Joint Police Services	87.57	42.46	31.85	61.04	0.02
Roadways	515.42	249.91	187.43	359.24	0.67
Township of Norwich Total	1,251.03	606.58	454.93	871.94	0.83
Oxford County					
General Government	116.00	59.00	45.00	88.00	0.1
Long-Term Care	429.00	221.00	167.00	317.00	
Land Ambulance	37.00	19.00	15.00	27.00	0.03
Roads and Related	732.00	379.00	284.00	546.00	0.59
Library Service	462.00	239.00	178.00	343.00	
Water	1,257.00	609.00	457.00	877.00	0.43
Wastewater	4,911.00	2,381.00	1,786.00	3,423.00	1.59
Oxford County Total	7,944.00	3,907.00	2,932.00	5,621.00	2.74
TOTAL	9,195.03	4,513.58	3,386.93	6,492.94	3.57

[a] Industrial buildings exempt.

Development Charges for Tillsonburg – 2007

Service	$ / Residential Dwelling Unit				Non-Residential
	Single and Semi-detached	Apartment 2 Bedroom and Larger	Apartment Bachelor and 1 Bedroom	Other Multiples	$ / square foot of floor area
Tillsonburg					
General Government	25.36	13.09	9.82	18.81	
Fire	216.52	111.75	83.81	160.64	
Police Services	165.80	85.58	64.18	123.02	
Roadways	1,323.83	683.27	512.45	982.20	
Library	407.68	210.42	157.81	302.47	
Recreation	686.72	354.44	265.83	509.50	
Public Works	398.58	205.72	154.29	295.72	
Tillsonburg Total	3,224.49	1,664.27	1,248.19	2,392.36	
Oxford County					
General Government	116.00	59.00	45.00	88.00	0.1
Long-Term Care	429.00	221.00	167.00	317.00	
Land Ambulance	37.00	19.00	15.00	27.00	0.03
Roads and Related	732.00	379.00	284.00	546.00	0.59
Water	1,730.00	893.00	669.00	1,283.00	1.24
Wastewater	2,143.00	1,106.00	830.00	1,590.00	1.49
Oxford County Total	5,187.00	2,677.00	2,010.00	3,851.00	3.45
TOTAL	8,411.49	4,341.27	3,258.19	6,243.36	3.45

[a] Industrial buildings exempt.

Development Charges for Ingersoll – 2007

Service	$ / Residential Dwelling Unit				Non-Residential
	Single and Semi-detached	Apartment 2 Bedroom and Larger	Apartment Bachelor and 1 Bedroom	Other Multiples	$ / square foot of floor area
Ingersoll					
General Government	N/A	N/A	N/A	N/A	0.0
Fire Services	N/A	N/A	N/A	N/A	0.0
Joint Police Services	N/A	N/A	N/A	N/A	0.0
Roadways	N/A	N/A	N/A	N/A	0.0
Other	N/A	N/A	N/A	N/A	0.0
Ingersoll Total	1,131.44	583.98	437.97	839.45	0.0
Oxford County					
General Government	116.00	59.00	45.00	88.00	0.1
Long-Term Care	429.00	221.00	167.00	317.00	
Land Ambulance	37.00	19.00	15.00	27.00	0.03
Roads and Related	732.00	379.00	284.00	546.00	0.59
Library Service	462.00	239.00	178.00	343.00	
Water	1,234.00	636.00	478.00	916.00	0.64
Wastewater	4,340.00	2,240.00	1,680.00	3,221.00	2.47
Oxford County Total	7,350.00	3,793.00	2,847.00	5,458.00	3.83
TOTAL	8,481.44	4,376.98	3,284.97	6,297.45	3.83

[a] Industrial buildings exempt.

Development Charges for Delhi – 2007

Service	$ / Residential Dwelling Unit				Non-Residential [a]
	Single and Semi-detached	Apartment 2 Bedroom and Larger	Apartment Bachelor and 1 Bedroom	Other Multiples	$ / square foot of floor area
General Government	84.00	52.00	42.00	63.00	0.16
Fire	270.00	167.00	135.00	200.00	0.58
Police Services [b]					
Ambulance	26.00	19.00	16.00	13.00	0.06
Roadways	215.00	133.00	107.00	159.00	2.10
Library	172.00	107.00	86.00	127.00	
Recreation	119.00	74.00	59.00	88.00	
Water	330.00	245.00	205.00	165.00	2.18
Wastewater					2.20
TOTAL	1,216.00	797.00	650.00	815.00	7.28

[a] Industrial buildings exempt.
[b] Police Services in Norfolk County are provided by the Ontario Provincial Police.

Development Charges for the Township of Guelph/Eramosa – 2008

Service	$ / Residential Dwelling Unit				Non-Residential [a]
	Single and Semi-detached	Apartment 2 Bedroom and Larger	Apartment Bachelor and 1 Bedroom	Other Multiples	$ / square foot of floor area
Township of Guelph/Eramosa					
Public Works	754.29	370.07	268.55	547.41	0.00
Fire	217.15	106.64	77.10	156.77	0.00
Corporate	92.53	44.98	32.12	65.54	0.00
Parks and Recreation	1,701.33	833.95	605.24	1,234.88	0.00
Township of Guelph/Eramosa Subtotal	2,765.30	1,355.64	983.01	2,004.60	0.00
Wellington County	1,465.00	574.00	795.00	1,059.00	1.22
Township of Guelph/Eramosa Total	4,230.30	1,929.64	1,778.01	3,063.60	1.22
Rockwood Area Services					
Hydro	nil	nil	nil	nil	nil
Water	4,176.22	2,045.71	1,482.88	3,026.15	3.14
Sanitary Sewer -Collection	5,358.68	2,631.66	1,906.92	3,892.79	4.02
Sanitary Sewer -Treatment	1,218.16	596.23	433.05	882.79	1.14
Rockwood Area Subtotal	10,753.06	5,273.60	3,822.85	7,801.73	8.30
Township of Guelph/Eramosa	2,765.30	1,355.64	983.01	2,004.60	0.00
Wellington County	1,465.00	574.00	795.00	1,059.00	1.22
Rockwood Area Total	14,983.36	7,203.24	5,600.86	10,865.33	9.52

[a] Industrial buildings exempt.

Appendix D – Building Permit Fees

Township of Norwich Building Permit Fees - 2007

Item	Permit Fee
Residential	
New residential construction including single family dwellings, multiple units, additions and change of use	$100.00 + $0.35 per sq ft
Mobile home used as a second dwelling on a farm and seasonal dwellings	$100.00 + $0.35 per sq ft
Renovations to residential dwellings	$100.00 + discretion of CBO per sq ft (if applicable)
Carports, garages, porches, decks including additions	$100.00 + $0.20 per sq ft
Unfinished basement	$100.00 + $0.15 per sq ft
Residential Plumbing Permit	$50.00 + $10.00 per fixture
Storage and implement sheds	$100.00 + $0.20 per sq ft
Small garden and yard sheds	$30.00 per unit
Accessory building renovations	$50.00 per unit + discretion of CBO
Pools in ground and above ground	$100.00 flat fee
Pools with sun decks	$100.00 + $0.20 per sq ft
Commercial / Industrial	
New commercial, institutional, or industrial buildings including renovations and changes	$100.00 + $7.00 per $1,000.0 of value + $35.00 for any additional inspection due to plan changes
Commercial Plumbing Permit	$50.00 + $10.00 per fixture
Farm	
New animal and poultry housing units including additions, renovations and chance of use	$100.00 + $0.15 per sq ft
Implement and storage sheds, greenhouses, bunk houses, milk houses, compost structures, etc.	$100.00 + $0.15 per sq ft
Vertical silos, corn cribs, and small steel granaries	$200.00 flat fee
Horizontal or bunk silos	$100.00 + $0.05 per sq ft
Manure storage areas including manure pits, manure tanks, and solid manure pads	$100.00 + $0.05 per sq ft (fence to be erected prior to use for pits)

Source: Township of Norwich – Schedule A By-Law 98-2002.

Delhi Building Permit Fees - 2007

Item	Permit Fee
Building Permit	$45.00 for the first $3,000; plus $11.00 per $1,000.00 construction thereafter. (For industrial building development only, there is a capping building permit fee of $25,000)
Plumbing Permit	
Residential	$40.00 initial fee plus $6 per fixture
Commercial	$50.00 initial fee plus $11 per fixture
Septic Permit	
New	$350.00
Repair/replacement	$325.00

Source: Norfolk County Building Permit Fees, 2007.

Tillsonburg Building Permit Fees - 2007

Item	Permit Fee
Building Permit:	$45.00 flat fee for the first $1000.00 of estimated value of construction, plus $10.00 per each additional $1000.00 or part thereof
Plumbing Permit	$40.00 flat fee, plus $6.00 per fixture
Temporary Building Deposit	$2,000.00
Oxford County Development	$1,314.00 Single Family Dwelling (SFD)
Oxford County Water & Sewer	$3,873.00 (SFD)
Tillsonburg Development	$3,602.21 (SFD)
Tillsonburg Levy	1.25% of construction costs (SFD)
Design Criteria By-law Deposits	$1,200.00 for the first lot $500.00 each additional lot (SFD)
3/4 Water Meter	$143.75 (larger water meters are based on current price).
Other Oxford County Development Fees	
Commercial Development Fee	$3.23 per square foot
Private Institutional Development	$3.23 Per square foot
Lawyers Compliance Letters	$35.00 each / SFD

Source: Town of Tillsonburg, Building and Development Permit Fees. April 2007.

Ingersoll Building Permit Fees - 2007

Item	Permit Fee
Residential new buildings, additions, carports	Flat fee $65.00 + $0.45 sq. ft
Industrial, Commercial, Institutional new buildings, additions.	Up to 30,000 sq ft: flat fee $65.00 + $0.35 sq. ft.
	30,001 sq ft and up: flat fee $65.00 + $0.25 sq. ft.
Interior/Exterior Renovations all classes	$65.00 flat fee up to $10,000 construction value and $7.00 for each additional $1,000
Sheds, decks, etc.	$65.00
Demolition -Residential -Non-Residential	 $65.00 $75.00
Swimming Pool	$65.00
Plumbing Permit	$30.00 + $7 per fixture
Signs	$50.00
Connections to Sewer	$35.00
Change of Use	$65.00
Occupancy Permit	Included in permit fee
Lawyer Clearance Letters	$50.00
Refundable Deposit - Damage and Street Cleaning	$500.00
Property Standards Clearance Letter	$100.00

Source: Town of Ingersoll – Building Fees, Schedule "B" To Bylaw No. 05-4245. 2007.