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A CANADIAN COMMUNICATIONS CENTRE IN TORONTO

...a preliminary study of feasibility...

Prepared for: The Ontario Ministries of
Transportation and
Communication
and Industry and Tourism,
and the Federal Department
of Communications

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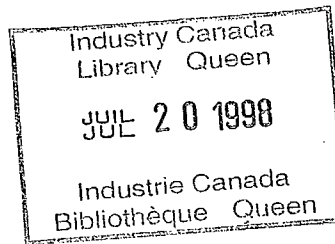
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Mr. Jean Fournier
Senior Administrator
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Dear Mr. Fournier:

On behalf of IBI Group and my colleagues in Nordicity Group Ltd., I am pleased to submit copies of our report on the concept of a Toronto communications centre.

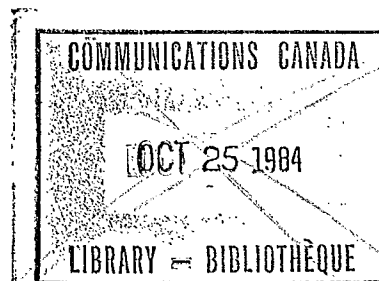
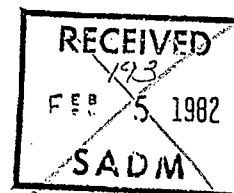
We will shortly be writing to you concerning approaches to refinement of required programs and further analysis of financial and physical issues pertaining to the centre.

Yours sincerely,

B. Laurie Edwards,
Principal.

BLE:bf

encl.



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SUMMARY

This report contains an elaboration of the concept of a Canadian communications centre in south-central Toronto. The centre concept is to give physical expression to Toronto-based activities and enterprises in the communications industry. After analysis and review of the concept with industry, it is evident that a real opportunity exists to integrate the communications centre concept with the planning objectives for the physical development of the south-central Toronto core.

The communications industry is characterized by rapid technological change that will lead to a growth of products and services:

- for the home, including pay-TV, cable-satellite services, videotex, personal computers, videodisc and videocassette recorders;
- for the office, including electronic mail, communicating word processors, intelligent telephones and other terminal attachments, and data terminals and mini-computers.

There is a continuing need to familiarize the individual consumer and the office, industrial, or institutional user with the new office and home products and services. As well, to develop these new products and services, a high degree of interaction among different parts of the communications industry is required. Thus, a communications centre could act as an important focal point for these demonstration and new product/service development activities.

The communications industry within Canada is highly focused in Toronto, as illustrated in this report. This is beneficial to achieving a critical mass of investment and skills in a rapidly growing industrial sector. The centre should help Canadian industry to achieve levels of technological and creative excellence that are competitive with centres in North America and elsewhere.

During the course of our assignment, we interviewed representative spokesmen of the communications industry, whose reaction to the concept was overwhelmingly positive. Their response has provided the basis of five suggested areas of program activity for a communications centre:

- Marketing: companies in the cable, telecommunications, computer, electronic publishing, and other businesses could use the centre's facilities for shows, exhibitions, and other demonstrations to Canadian and foreign customers.
- Institutional Relations: new products and services could be given public exposure through hands-on demonstration. This could become an important pre-conditioning to market familiarization and acceptance by the home and office consumer. It also could help modernize the public perception of the activities of certain communications companies.
- Training: with a shortage of skilled manpower throughout the communications industry, training could become an important related activity in a centre with many firms present. Manpower training requires access to the facilities and expertise of operating enterprises, as well as coordination, which could be enhanced within a centre context.
- Specialized facilities and services: shared facilities and services were judged important by many respondents, particularly in light of the costs and limited availability for such facilities as special effects, state-of-the-art theatres, technology demonstration equipment and administrative and computer-based information services.

- Brokerage and R&D: technological advancement in the communications industry requires a constant intelligence updating in R&D, market and the identification of new opportunities. New "brokerage" services could be established to promote business arrangements among different businesses in the communications industry.

The initial assignment was limited to interviews with representatives of components of the communications industry, not a statistically reliable sampling of the entire industry. The report illustrates many possibilities respecting these five programs which must be further defined in order to provide the basis for on-going development and operating commitment.

TABLE OF CONTENTS

	<u>Page</u>
SUMMARY	
1. The Project	1
2. The Concept	3
3. The Opportunity	4
The Importance of the Communications Sector	4
The CBC's Proposed Consolidation	7
4. Toronto's Communications Resources	12
Production	13
Broadcast and Cable Equipment (Supply & Manufacture)	14
Audio Recordings	14
Film and Television Production	15
Carriage	16
Common Carriers	16
Broadcasting	18
Cable Television	18
Services	23
New Developments	23
Elgin/Wintergarden Theatres	27
New Massey Hall	28
Guild Hall	28
In Sum	29
5. Industry Response	31
The Original Concept	31
Marketing...the need for Exhibition of Canadian Products	33

TABLE OF CONTENTS, P.2

	Institutional Relations...the need to demonstrate the "who" and the "what" of Canadian Communications	35
	Training...the need for skilled people	38
	...specialized facilities and services	40
	Brokerage and R&D...the need for "packaging" and technological forecasting	42
6.	The Communications District	44
	Location	44
	City Policies	45
	Development Patterns	49
	Resources and Developments within the District	51
	Suitability of Location in Toronto	54
7.	The Communications District and Public Policy	57
	Communications Industry	57
	Economic Development	58
	Physical Development	59
8.	Conclusion - The Centre Re-defined	61

LIST OF EXHIBITS

EXHIBIT ONE	Common Carriers in Toronto	17
EXHIBIT TWO	Revenue and Total Employment of the Privately Owned Television Broadcasting Industry, 1979.	19
EXHIBIT THREE	Revenue and Total Employment of the Privately Owned Radio Broadcasting Industry, 1979.	20
EXHIBIT FOUR	The Domination of Toronto Based Cable Companies	22
EXHIBIT FIVE	Computer Service Industry in Canada, 1979.	24
EXHIBIT SIX	The Leading Computer Service Bureaus in Canada, 1978.	25
EXHIBIT SEVEN	The Leading Computer Hardware Suppliers in Canada, 1978.	26
EXHIBIT EIGHT	Proposed Communications District in Downtown Toronto	48

LIST OF APPENDICES

- | | |
|----------------|--|
| APPENDIX ONE | A Communications Centre In Toronto
(Concept Paper) |
| APPENDIX TWO | List of Interviewees |
| APPENDIX THREE | The Distribution of Selected Production
Companies and Related Services in Downtown
Toronto |
| APPENDIX FOUR | Elgin/Wintergarden Theatres |
| APPENDIX FIVE | New Massey Hall |
| APPENDIX SIX | Guild Hall Project |
| APPENDIX SEVEN | Excerpts from the Imax Brochure |
| APPENDIX EIGHT | Zoning Designations |
| APPENDIX NINE | Zoning Designations governing the Communications
District |

I. THE PROJECT

After discussion with officials of ministries of the Ontario government, the City of Toronto, and the Federal government, Nordicity Group Ltd. (NGL) and IBI Group proposed a several part study of the feasibility and benefits of concentrating Canadian communications enterprises in a Toronto centre. The proposal was approved and, with the knowledge and cooperation of the Planning Department of the City of Toronto, was sponsored by the Ontario Ministries of Industry and Tourism and Transportation and Communications and the Federal Department of Communications. The ensuing contract required NGL and IBI to examine and elaborate the concept of a communications centre, in Toronto, to review this concept with the CBC, and to consult with diverse elements of the communications industry regarding the feasibility of the concept.

The approach used was as follows:

- development of a concept paper for review with interested institutions and companies (Appendix One);
- review of existing and planned communications resources and enterprises in Toronto;
- development of a survey, to be used in association with interviews to elicit relevant information;
- meetings with CBC officials (the President, A.W. Johnson; the Executive Vice-President, P. Desroches; the Vice-President, Planning, M. Deschamps) to determine the Corporation's plans in respect of its Toronto operations;

- interviews with executives of Canadian communications enterprises and relevant associations to review the concept and to assess principal industry needs (Appendix Two).

2. THE CONCEPT

The notion of a communications centre was described in a concept paper that argued. . .

- communications, in its broadest sense, is an industrial sector that is changing rapidly and that promises to generate significant economic growth in the next decade;
- Toronto is a natural centre for Canadian communications enterprises;
- initiatives to support and intensify concentration of various kinds of communications activities make sense. . .
 - as an industrial development theme for Toronto;
 - as a way to increase existing capabilities of a national resource;
 - as a way to provide geographical focus for international marketing;
 - as a way to demonstrate/exhibit Canadian capabilities in a strategic area of national industrial development.

The original concept emphasized the notion of 'place'. . .

- shared facilities;
- proximity of different kinds of activities. . .
 - broadcasting,
 - production (film and television),
 - high technology research, development, and demonstration;
- exhibition of new communications products and services;
- specialized facilities and services.

3. THE OPPORTUNITY

The communications sector is rapidly assuming a high position among Canada's industrial economic, social, and cultural goals. Further, the CBC's intended consolidation on Front Street constitutes the kind of cornerstone that provides an opportunity to interpret local development in the context of broader industrial and economic considerations.

The Importance of the Communications Sector

Communications is assuming a special importance in the policies of many Western governments, because it presents unique economic opportunities. Several examples of this industry's extreme volatility and growth illustrate this argument. . .

- In the next ten years the world market for telecommunications equipment is expected to be in the order of \$640 billion.
- By 1990 the world market for optical fibres alone will exceed \$2 billion.
- Home information services (videotex, teleshopping, home security) could be serving a \$100 million market in Canada by the end of the decade.
- Canada's film and television production industry is anticipating an infusion of more than \$500 million over the next five years, as pay television matures in the domestic market.
- Direct broadcast satellite services should be launched in Canada and the U.S. by the mid-1980s, ensuring that the development of specialized programming and information services will receive yet another boost.

The economic potential of communications developments is such that this sector's bearing on national sovereignty is now widely appreciated. The Clyne Report* argued, for example, that in meeting the challenges of this sector, we are "preparing the framework for the national life of Canada in the 21st century--just as Canadians of the 1870s and 1880s determined the shape of 20th century Canada by building our national railroad" (p.2). For its part, the Communications Research Advisory Board (CRAB),** in its 1980-81 report, argues that the information/communications industry is becoming the most important growth business in the world" (p.14), and the Ontario Government's Micro-electronics Task Force*** worried that "because the demand for information is world-wide--not a purely Canadian phenomenon--Canada's past performance in this sector (exports from the communication's equipment sector exceeded imports by 34 per cent) is no guarantee of future success. It is to be anticipated that aggressive competition from foreign suppliers will increase further and domestic and export markets will be hotly contested...industry action and...government policies will be needed"(p.69).

* Consultative Committee on the Implications of Telecommunications for Canadian Sovereignty, Telecommunications and Canada, 1979.

** Report of the Communications Research Advisory Board, 1980-81.

*** Ministry of Industry and Tourism, Background Papers for Government of Ontario Micro-electronics Task Force, 1981.

The sovereignty issue is complex. For not only does the communications sector lie at the heart of Canadian strategies for economic growth, it also is central to this country's aspirations in a cultural context. As the Deputy Minister of the Federal Department of Communications notes in his response to the 1980-81 CRAB report, "new policies regarding content can no longer be assessed in isolation from the technological delivery system" (p.11). The interface between hardware and software and the explosion of new consumer and office services made possible by the application of new technology mean that such divergent aspects of communications as computers and dramatic production must now be understood in relation to one another.

Effective deployment of Canadian products and services in respect of economic and cultural aspirations is, then, assuming a high priority for governments at all levels. For its part, industry, from telecommunications giants to "man-and-girl Friday" independent television producers, are anxious to participate in a burgeoning domestic and international communications marketplace. The time is ripe for an initiative that reflects Canadian aspirations across the full range of communications opportunities--technological, cultural, and marketing.

The CBC's Proposed Consolidation

The aspirations of one of Canada's largest communications enterprises (the CBC) to consolidate its Toronto operations in a broadcast centre could lead to a cornerstone development that would underpin and catalyze a range of other initiatives relevant to the objectives of a communications centre.

The CBC is, of course, already a major actor in Toronto communications. While it is known for its radio and television broadcasting operations, its contribution to Toronto's cultural and economic life is not always recognized....

- Production activities are concentrated in Toronto...
 - nearly 80 per cent of expenditures are made at the network level, located for the English Services Division in Toronto;
 - payments to the creative community (\$57 mm plus in 1979-80) are principally cycled through the economies of Toronto and Montreal;
 - staff (12,000 plus) are concentrated in Toronto, meaning local recycling of lion's share of English Division's share of \$270 mm in annual salary payments (1979-80).
- Procurements of independent productions are concentrated in Toronto...
 - network office responsible for bulk of 60 per cent of CBC's \$23 mm expenditure (1979) on independent films, television programs, and craft resources;

- CBC's Toronto facilities have shaped the pattern of independent production and production services (see Appendix Three).
- High technology requirements are significant in Toronto. . . .
 - high technology procurement, much of it for Toronto operations, has been estimated at \$57 mm plus for the next three years;
 - particular relationships have been forged between the CBC and growth oriented, R&D based firms like Digital Video Systems, McCurdy Radio Industries, Leitch Video, and Ward Beck Systems...all in Toronto.

The CBC has played a pre-eminent role in providing Toronto with a crucial resource of enterprises and people who will forge Canada's participation in the burgeoning cultural and entertainment industries. Through initiatives as varied as workshops for aspiring radio playwrights, a decision to commit to the contracting out of growing numbers of television productions, participation in a major, national teletext trial, and introduction of technologically sophisticated news gathering techniques such as those used by the JOURNAL, the CBC has helped to create a critical mass of expertise and capability that should assist Toronto in participating in communications activities of international scope and significance.

CBC is now intending to concentrate its operations (and thus the Corporation's development/catalytic effect) in one part of Toronto. The

CBC's own aspirations* are not difficult to understand. Consolidation offers the Corporation real gains in terms of efficiency, reductions in travelling time, increased interplay among management and the creative staff, improved morale, and an overall enhanced sense of identity with the product of public broadcasting. The need for consolidation, as far as most people at the Corporation are concerned, is acute: the existing facilities are antiquated (the radio building on Jarvis Street was a private girls' school before the Second World War, a womens' barracks during the war, and a "proposed temporary radio building" when CBC first moved in in 1946), overcrowded, awkward (the design facilities are separated from studios...meaning that sets have to be transported), and dangerous (the present assistant General Manager for Television recalls standing next to a radiator with a rope tied to it in lieu of a fire escape in one Toronto office he had).

It is understood that current thinking calls for a facility of from 1 mm square feet to 1.5 mm square feet, costing in the order of \$200mm. The proposed facility would house all present CBC opera-

* Repeated efforts to develop an actionable consolidation plan have failed. The history of this effort is replete with examples of CBC declining options (eg, on a 35 acre EP Taylor-owned site in 1958), arguments between the cities of Toronto and North York on the relative merits of a Don Mills site or a downtown site, elimination of possible funding for consolidation by the Diefenbaker government (in the same purse string tightening that cost Canada the Arrow), an aborted land swap between CN and the CBC (1972), failure of the Federal Cabinet to consult city officials regarding a Harbour-front/CBC scheme (1977), and purchase of a Front Street property from CNR in 1979.

tions in Toronto. Senior management of the Corporation has indicated that one option being considered is a self-financing plan that would involve little or no special allocation of public funds. That is, the facility will be financed through mixed-use, commercial development of space not required by the CBC, in collaboration with private sector developers.

There is little doubt that a CBC broadcast centre would markedly accelerate concentration of communications capabilities in south-central Toronto...assuming the location was appropriate.* Independent producers, film processing laboratories, performers, and design groups have a natural affinity for being close to the CBC action. And the CBC itself would act as an important drawing card for international program producers and buyers; CBC Enterprises, recently established to expedite CBC marketing and to establish the Corporation in a range of further use initiatives and new ventures, will constitute a particular focus for expanded activity in the commercialization of video-related products and services. Further, actual construction of required facilities will mean an important

* An inappropriate location negates the natural affinity for proximity felt by suppliers and related operators. The absence of a catalytic effect by Maison Radio-Canada in Montreal is illustrative. For the catalytic effect to work, the proximate environment must combine the attributes of pleasantness and space costs amenable to small as well as large enterprises.

boost to several Toronto area manufacturers...as well as employment.*

* The Toronto Construction Association has estimated that between 40 and 60 man years of work are generated by every \$1 million in construction.

4. TORONTO'S COMMUNICATIONS RESOURCES

The CBC operations in Toronto are only one aspect of the city's potential for concentration of communications resources. The strong presence of enterprises as diverse as book and periodical publishing, television production and broadcasting, telecommunications and community antennae television, and computer and micro-electronics based services is consistent with Toronto's domination of 'producer services' for office activities and the production and distribution components of the national economy.* Historically, the reasons for this concentration are evident--market size, proximity to U.S. markets, proximity to complementary services, availability of skilled personnel. In future, these characteristics will retain their importance, but changes in the industry and the aspirations of other cities and regions could conspire to undermine the core capability of Toronto.

While modern technology has partially blurred the distinctions between different sectors of the communications industry, this industry's concentration in Toronto can be illustrated against three broad categories:

* Head offices here, in the service sector, control 66 per cent of the revenue of the top 50 Canadian companies (J.N.H. Britton, Innovation, Industrial Strategy, and the Urban Economy: Toronto's Development Options, 1981. Centre for Urban and Community Studies, U. of T., Research Paper No. 127, p.12)

Production: communications software (film and television production, audio recordings, live theatre production and newspaper, periodical, and book publishing) and hardware (specifically, broadcast and cable equipment).

Carriage: common carriage (telecommunications, voice and data transmission), radio and television broadcasting, and cable television.

Service: computer based information, financial and business services.

Production

There are many kinds of goods that are produced by the different components of the Canadian communications industry. To illustrate both the diversity of goods and the concentration of enterprises which produce them, we have briefly examined the following industries:

- broadcast and cable equipment supply and manufacture;
- audio recording;
- television and film production.

There are several other important production oriented communications enterprises, of course, such as newspaper and book publishing, but the above categories serve for illustrative purposes.

Broadcast and Cable Equipment (Supply and Manufacture)

Existing inventories* identify some 213 enterprises in Canada that manufacture and supply broadcast and cable equipment (eg, transmission equipment, community antenna distribution equipment, audio/video production equipment). Of these 213 enterprises, 83 (39 per cent) are in Metro Toronto and 41 (19 per cent) in the immediate area surrounding Metro (Oakville, Bramalea, Markham, Oshawa). From these inventories, we estimate that between 160 and 180 firms (75 and 85 per cent) are principally suppliers with little or no manufacturing capabilities. Of firms that do manufacture (up to 70) 30 are located in Metro or its immediate surrounding area. This represents a significant concentration in this sector.

Audio Recordings

In 1978 the recording industry in Canada reported total revenues of about \$370 million. Foreign-controlled firms accounted for approximately 85 per cent of these revenues. The majority of

* Compiled from: Department of Industry, Trade and Commerce (DOITC), Canada in the World of Electronics, March 1980; Broadcaster, Fall Directory, November 1981; Scott's Industrial Directory of Ontario Manufacturers, 1979.

these foreign-controlled firms have headquarters and manufacturing facilities in Toronto--including, for example, CBS, MCA, RCA, and A&M Records.

The concentration of recording enterprises in Toronto is also characterized by a significant constituency of small independent firms (about half the membership of the CIRPA), such as Nimbus 9 Productions and Attic Records.

Film and Television Production

In 1979 the independent Canadian film and television production industry comprised some 273 producers reporting total revenues of \$122.6 million.* Although existing Statistics Canada data do not permit a precise calculation of the share of industry revenues controlled by Toronto based production companies, the sheer number of production companies (139)** and the concentration of production and post-production capabilities would seem to support the contention that some 50 to 60 per cent*** of industry revenues are earned by Toronto based companies. Moreover, the presence

* Statistics Canada, Motion Picture Production, 1979, Cat. No. 63-206

** Cinema Canada, Annual Directory, 1980-81

*** The consultants to the Guild Hall proposal have pointed out that "Toronto appears to be the film centre of Canada, and certainly of English-speaking Canada, with about 45% of total annual budget for motion picture production."

of internationally recognized companies like Nielsen-Ferns International (now Primedia), Norfolk Communications and Glenn-Warren Productions clearly identifies Toronto as the core of Canada's production industry.

Carriage

The carriage industry comprises companies that distribute information and entertainment...on a public access basis (ie, the common carriers), or on a proprietary basis relative to the information or entertainment distributed (eg, broadcasters). All enterprises involved in carriage/distribution are technology and/or skill intensive industries.

Generally, three categories of carriers operate in Canada:

1. Common Carriers - all telephone companies (collectively represented by the TCTS) and CN-CP Telecommunications.
2. Broadcasters - private and public radio and television broadcasters (eg, CBC, CTV).
3. Cable Television Operators - licensed cable systems.

Common Carriers

Bell and CN-CP dominate the telecommunications/common carrier activity in Toronto, an industry that, nationally, accounts for about two per cent of Gross National Product and that has an average annual growth of about 10 per cent. Exhibit One describes their presence in Toronto.

EXHIBIT ONE

Common Carriers in Toronto

<u>Carrier</u>	<u>Total Employment</u>	<u>Toronto Employment</u>	<u>Revenues from Telecommunications Operations (1980)</u> <u>(\$ billions)</u>	<u>Nature of Activities in Toronto</u>
Bell	54,000	15,000*	3.4	<ul style="list-style-type: none"> ● Ontario headquarters ● principal office of Bell's computer communications group (CCG) ● B-N Software Research ● headquarters of Bell Communications Systems: arms-length sales and marketing subsidiary for Bell's business communications products ● Yorkville - permanent demonstration facility for business and consumer communications products ● major Telidon field trial in 500 homes in Toronto
CN-CP	5,000	Not Available	0.3	<ul style="list-style-type: none"> ● CN-CP headquarters in West Toronto, including R&D facilities ● major facilities on Front Street

Sources: CRTC, Facts Digest on Broadcasting and Telecommunications in Canada, 1980.
Bell Annual Report, 1981

* Estimated by Bell PR staff

Broadcasting

In an Economic Council of Canada study of the Canadian broadcasting industry,* it is noted that

private broadcasting (radio and television) is highly concentrated in terms of ownership and control. For 1973, it has been estimated that ten of the largest public companies accounted for 71 per cent of industry profits through control of 33 AM, 15 FM, and 19 primary television stations (p.51).

Of the ten companies identified in this study, six have headquarters in Toronto. They are Baton Broadcasting, Selkirk Communications, CHUM Ltd., Standard Broadcasting, Bushnell Communications (a wholly owned subsidiary of Standard Broadcasting) and CFCN Communications (a wholly owned subsidiary of MacLean Hunter).

Toronto's inventory of originating radio and television stations comprises 18 radio stations and 7 television stations. Exhibits Two and Three describe their domination of industry revenues.

Cable Television

Six cable companies headquartered in Toronto represent over half the cable subscribers in Canada. Among this group is the largest cable system in the world, Rogers Cablesystems. Rogers alone

* R.E. Babe, Canadian Television Broadcasting Structure, Performance and Regulation, 1979.

EXHIBIT TWO

Revenue and Total Employment of the Privately Owned Television
Broadcasting Industry, 1979

	<u>Revenue in millions</u>	<u>Employment</u>	<u>Establishments</u>
Canada	473	6,365	73
Ontario	183	2,168	19
Toronto	121*	1,431*	4 **

* These are rough estimates based on a 2/3 share of the provincial totals, to reflect the relative proportion of the Toronto market for local, national, and network air time.

** The four privately owned Toronto television stations are CFTO, CFMT, CITY, and CKGN. In addition, there are three publicly owned television stations in Toronto (CBLT, CBLFT, and TV-Ontario).

Source: Statistics Canada, Radio and Television Broadcasting, 1979, Catalogue No. 56-204.

EXHIBIT THREE

Revenue and Total Employment of the Privately Owned Radio
Broadcasting Industry, 1979

	<u>Revenue in millions</u>	<u>Employment</u>	<u>Establishments</u>
Canada	356	9,069	356
Ontario	126	3,199	108
Toronto	83 *	2,111*	16 **

* These are rough estimates based on a 2/3 share of the provincial totals, to reflect the relative proportion of the Toronto market for local, national, and network air time.

** The sixteen privately owned Toronto radio stations are CFGM, CFRB, CFTR, CHFI-FM, CHIN, CHIN-FM, CHUM, CHUM-FM, CILQ-FM, CJBC, CJCL, CJRT-FM, CKEY, CKMW, CK0-FM, and CKFM-FM. In addition, there are two publicly owned radio stations in Toronto (CBL, and CBL-FM).

Source: Statistics Canada, Radio and Television Broadcasting, 1979,
Cat. No. 56-204.

represents about 27 per cent of Canada's cable subscribers. In addition, Rogers has major interests in cable systems in the U.S., where cable systems carry a variety of information and entertainment channels. In Canada, Rogers also has major interests as a potential carrier of a diversity of business and consumer information services (some of these services are now demonstrated in its 25 Adelaide Street facility). Exhibit Four describes the activities of the six cable companies with headquarters in Toronto.

EXHIBIT FOUR

The Domination of Toronto Based Cable Companies

<u>Company</u>	<u>Canadian Subscribers</u>		<u>Percentage of all Canadian Subscribers</u>	<u>U.S. Subscribers</u>
	<u>Toronto</u>	<u>Canada</u>		
Rogers Cable- Systems	328,512	1,229,308	27	537,000
Maclean-Hunter CATV	109,664	340,183	8	118,600
Cablecasting Ltd.	74,500	162,260	4	26,800
CUC Ltd.	113,459	216,774	5	-
Cablenet Ltd.	-	134,719	3	19,207
Selkirk Commu- nications	-	159,758	4	19,000
Total	626,135	2,243,002	51	720,607

Sources: Canadian Cablesystems Annual Report, 1981
Maclean-Hunter Annual Report, 1980
Selkirk Communications Annual Report, 1980
Matthews CATV, June 1981

Services

Enterprises engaged in the provision of computer services are also well represented in Toronto--one fifth of all firms in Canada (see Exhibit Five) including five of the top 10 computer service bureaus in Canada (see Exhibit Six). Toronto is also the headquarters of the principal suppliers and manufacturers of computer hardware with six of the ten leading suppliers located here (see Exhibit Seven).

Further, there is a new kind of quasi computer service firm positioned to explore and exploit opportunities in electronic publishing, in part growing out of data based publishing. Infomart* is the prime example of this new breed of company; it has specialized in turnkey projects involving videotex software and related services for Telidon.

New Developments

In and of itself, this concentration of communications enterprises does not constitute a development theme, of course. That would require a more specific geographical focus and coordinated formation of services and activities that would maximize existing capabilities.

* A joint venture of Torstar and Southam, which itself has just recently established a joint venture with the Times-Mirror of Los Angeles.

EXHIBIT FIVE

Computer Service Industry*

	Canada	Ontario	Toronto
Establishments	689 (100%)	338 (49%)	142 (21%)
Revenues (\$000,000)	638 (100%)	379 (59%)	Not Available
Employees	14,370 (100%)	8,286 (58%)	Not Available

* Firms offering computing services, remote access to central computer facilities, and firms developing software.

Source: Statistics Canada, Computer Service Industry, 1979,
Cat. No. 63-222.
Computerdata, Canadian Data Processing Directory, 1980.

EXHIBIT SIX

The Leading Computer Service Bureaus in Canada

<u>Rank</u>	<u>Company</u>	<u>Revenues</u> (millions \$)	
		1978	1977
1	IBM Service Bureau	30.0	34.0
2	Canada Systems Group EST Ltd.	28.8	26.4
3	Datacrown Ltd.*	28.0	20.0
4	Comshare Ltd.	23.1	15.8
5	Computel Systems	23.0	15.9
6	Systems Dimensions Ltd.*	22.7	18.5
7	Multiple Access Computer Group	21.2	18.8
8	Canadian General Electric (Information Services)	19.2	16.0
9	I.P. Sharp Associates	19.1	14.6
10	I.S.T. Inc.	17.5	11.9

* This does not include the merger of Systems Dimensions Ltd. and Datacrown. The revenue of the merged firms of \$60.2 million in 1979 make the new company the leading service bureau in Canada.

Source: The Financial Post, Special Report on Computers, March 8, 1980.

All firms have headquarters in Toronto, except Canada Systems Group which has its headquarters in Mississauga.

EXHIBIT SEVEN

Leading Computer Hardware Suppliers in Canada, 1978

<u>Company</u>	<u>1978 Sales</u> (\$mm)	<u>HQ Location</u>
IBM	851.9	Toronto
Control Data	109.6	Mississauga
DEC	108.2	Ottawa
Sperry	93.2	Mississauga
Burroughs	68.7	Toronto
Honeywell	63.4	Toronto
NCR	61.6	Mississauga
Amadahl	44.8	Toronto
Xerox	36.6	Toronto
Consolidated	23.5	Toronto

Source: The Financial Post, Special Report on Computers, March 8, 1980.

However, communications initiatives viz the entertainment and cultural industries are already evincing signs of geographical focus. Examples include--in addition to the concentration of television production facilities in south-central Toronto, the O'Keefe Centre, live theatre and CBC's plans for development of the Front Street site--the Elgin/Wintergarden Theatres development, New Massey Hall, and proposed development of a national Guild Hall in the Harbourfront area.

Elgin/Wintergarden Theatres

The Elgin/Wintergarden Theatres development (detailed description of this development, New Massey Hall, and the Guild Hall project are contained in Appendices Four, Five and Six*) is a refurbished theatre complex toward the bottom of Yonge Street. Its primary function is to showcase the best of Canadian theatre; of the anticipated annual capacity of 1,000,000 performance seats, 250,000 and 350,000 will be accumulated by Canadian shows in 1983/84 and 1984/85, respectively. The project, anticipated to cost about \$13 mm, is expected to pump some \$30 mm annually into the Toronto economy, and, in addition to significantly increasing employment opportunities for Toronto actors, writers, and other theatre people, it should dramatically elevate the domestic and international profile of Canada's theatrical community.

* Appendix 6 also contains a letter on the communications centre from the chairman of the Committee for the Guild Hall of Canada.

New Massey Hall

New Massey Hall, which will begin operations in September of this year, is a world class concert hall designed by Arthur Erickson and estimated to cost \$39mm. Intended to be a professional facility for professionals, it will be home for the Toronto Symphony and the Mendelssohn Choir...and it will be a world class performing centre for Canadian country and western and chamber music. Certainly, it will make Toronto a place to be for the finest musical events, and the profile of Canadian performers and recording artists will be elevated significantly. Moreover, plans are already afoot to take full advantage of cooperation with the electronic media, as well as to engage in a range of further use ventures linked to events at the new hall. Toronto's music community and the cultural industries that market this community's products and services stand to gain significantly from the operation and orientation of New Massey Hall.

Guild Hall

The third development, still very much in the pre-planning stages, is a proposal to construct a national Guild Hall (estimated cost: \$25mm for some 100,000 square feet) in the Harbourfront area of Toronto. The new facility is intended to house Canada's organized talent community (guilds, associations, talent unions), as well as part of the National Film Board's operations and a number of independent television and audio recording producers. Industry associations, such as the Canadian Independent Record Association (CIRPA) may also be represented. The proposed Guild

Hall is founded, though, on several identified priorities for the industry; need for a comprehensive, computerized information service viz production opportunities in Canada and elsewhere, a current shortage in specialized facilities (eg, tape editing, viewing rooms, state-of-the-art cinema facilities, reference and archival libraries, and research and development relative to the interface of film and television producers and new production and exhibition technologies), and the need for a profile and focal point for industry participation in public policy debate (eg, copyright, pay television, etc.). The proposed Guild Hall, once constructed, is expected to be self financing via tenant fees and services.

In Sum

Evidently, the communications industry is alive and well in Toronto. However, the developments to date, as well as those planned for the future, are incremental: they lack a single, geographical focus and are not necessarily undertaken with extensive reference from each other. The consequences of this pattern of development can be redundancy, failure to create facilities and services which answer to the needs of the many as opposed to single enterprises, and a land and space use pattern which may militate against optimum location for the many smaller and more innovative enterprises that are the bedrock of communications capability across a broad spectrum of sectors and industries.

In the face of rapid change within the international communications marketplace, there is an evident need for continued enhancement of existing domestic capabilities, which, as we have seen, are concentrated in Toronto. For the city to build on its core capability, then, there is a need to give tangible expression to the capability and potential of this resource. Such expression, to the maximum possible extent, should reflect a coordinated approach to efficient support of our communications companies and people. The concept of a communications centre, of course, is rooted in our perception of its potential to meet these requirements.

5. INDUSTRY RESPONSE

On the assumption that benefits would accrue to still greater concentration of communications resources and capabilities in Toronto, the project team reviewed the concept of a centre with representative spokesmen of diverse elements of the industry. The starting point for this review was the hypothesis that a communications centre designed to enhance the profile and performance of communications enterprises would (a) respond to overlapping needs of different parts of the industry in a coordinated and cooperative way and (b) answer to the needs of small operations, as well as to the requirements of large institutions and companies.

The Original Concept

In characterizing the centre to industry representatives, the notion of central, shared facilities was described. Such facilities might include. . .

- the central offices of the communications centre;
- a secretarial pool;
- computer facilities;
- machine shop and technical staff;
- conference room including audio visual conferencing facilities;
- theatres;
- library;

- demonstration booths;
- industrial design facilities;
- video viewing rooms;
- production and post production video facilities;
- educational and training facilities.

Firms and organizations could occupy the centre on a temporary or permanent basis.

The temporary activities in the centre could include:

- displays of new communications technology provided by firms and government agencies (eg, Telidon technology, TVO educational technology, office of the future);
- communications related trade fairs;
- educational programs/training courses;
- conferences;
- plays/films.

Permanent activities could relate to:

- operations of communications firms;
- selected research functions of firms and organizations;
- offices of industry associations, government agencies and educational institutions;
- displays by firms and government agencies;
- representational and sales offices of firms.

The communications system throughout the centre would be the most advanced, reflecting the philosophy behind the concept.

This concept, as summarized here, was positively received by most of the people interviewed. They had read the concept paper, and several of them subsequently completed a questionnaire which provided an indication of the scope of their activities and the potential degree of interest in physical participation in a centre. The sectors covered included telecommunications, cable television, office and computer services, broadcasting, production, audio recordings, the organized talent community, manufacturers, and educational institutions.

Respondents identified five categories of need that a centre should address. These are marketing, institutional relations, training, specialized facilities and services, and 'brokerage' and R&D. Each category is described below...together with illustration of how it could be addressed in programmatic terms within a communications centre.

Marketing...the need for exhibition of Canadian products

Effective marketing, especially in the international context, is problematic in several communications industries. Relative to high

technology, for example, while a giant like Northern Telecom needs no assistance, smaller, innovative firms like Digital Video Systems (DVS) in North Toronto would welcome an opportunity to participate in frequent or permanent technological exhibitions in a central location. DVS' President, John Lowry, makes the argument in down to earth terms. If DVS had a marketing office/exhibition in a communications centre, representatives of CBS, BBC, and other international customers in town on non-DVS business would be likely to drop in to talk or see the latest technological twists.

This consideration is even more important in respect of film and television production. International marketing is a real weak spot for most Canadian independent producers, despite the enormous importance of export sales to their business (Canadian independents must recover 70 to 80 per cent of production costs in the export market, as compared with U.S. independents who are able to capture that proportion of costs in their home markets). Indeed, the need to market Canadian television and film underlies the Guild Hall proposal to establish viewing rooms and a state of the art cinema as part of its facility. In general, there is a requirement for physical exhibition of Canadian products on a continuing and, occasionally, special event basis. Recently appointed CBC Enterprises Director Guy Mazzeo has argued that facilities to do this are important to the Corporation, and other broadcaster-producers, including TVOntario, could also be expected to take advantage of exhibition for marketing

purposes in a central site.

Several possibilities could be envisaged in terms of how a centre might respond to these needs. Provision of sales office space, together with exhibit space and viewing rooms and equipment, is the most straightforward approach. In respect of performing artist-based enterprises, the Guild Hall project team is actively considering this; certainly, the CBC can be expected to develop an appropriate marketing 'complex' as part of its broadcast centre plans. A demonstration hall or permanent trade mart would involve a more extensive commitment, one which would have to be undertaken in concert with measures to address the second need identified by interviewees, institutional relations.

Institutional Relations...the need to demonstrate the "who" and "what" of Canadian communications

Several respondents identified a key requirement that is captured by the expression "institutional relations". This requirement has two dimensions: communication of what a company does and the context in which it operates; improving public and institutional 'literacy' in respect of important technology-based applications and requirements.

The former is perhaps best illustrated by Northern Telecom's expressed need to position itself in respect of the CRTC's recent interconnect decision. Specifically, Northern Telecom will soon have to market

directly to the consumer, and the company would like to generate a profile based on its contributions to Canadian science and technology. Public exhibition of new technology would help to achieve this. Other companies that might wish to participate in this aspect of a communications centre could include Rogers Cable (the company already has a technology demonstration on Adelaide Street), CN-CP (already located in the CN Tower and actively developing business communications, infotex, and electronic mail services), and the CBC (now engaged in an extensive teletext trial and presently operating a permanent 'exhibit' in Ottawa). Similarly, non-technological demonstrations could be mounted to effect; S. Cornell of the Canadian Cable Television Association has, for example, noted the potential of a publicly accessible centre for trials and demonstrations of community programming.

A centre would also educate people. Technology, or, more properly, the application of technology, is advancing much more quickly than people's understanding of its potential business use or the nature and scope of the 'gearing up' that they will need to do to take advantage of it. Several examples of respondents' concerns about technological literacy are instructive. . .

- D. Doyle, President of Ottawa based NABU, believes there is a need to expose relevant technology with a view to getting feedback on software development and to improve people's interaction with the new technology.

- H. Brune, Executive Director of the newly formed Office Communications Research Associates (OCRA), has identified "user training" as a priority issue; he proposed introducing people to new technology via a new generation of video games. He has also noted the opportunity a centre would provide for being "wired" in the most modern communications sense.
- Annie Lehman, a Producer-Director who is the prime mover in the Guild Hall proposal, has emphasized the need for a producer-technology-technician interface that would permit increased understanding of how new production technologies can be applied to television and film.
- Richard Neilsen, partner in Primedia (formerly Neilsen-Ferns International), has argued for creation of a facility to demonstrate applications of the technology of Toronto-based IMAX Systems Corporation. This technology permits large format film projection of unsurpassed quality (see Appendix Seven).

One way that these concerns could be addressed is operation of a demonstration hall, a facility that would be accessible to the public and that, to the greatest possible extent, would permit hands on experimentation with technologies as diverse as computer-aided video-tape editing, videotex, electronic filing cabinets, and so on. Corporate Identification in such demonstration, on the lines that Disney Productions is suggesting for its vast new Epcot park in Florida (ie, theme demonstrations and pavillions to be built and operated by American companies), would be appropriate. Moreover, a hall could include provision for demonstration of specialized technologies and applications (eg, DVS digital technology, Bell Northern's optical fibre work) for professional groups. Finally, such a hall would provide an ideal setting for special marketing displays and sales offices.

Training...the need for skilled people

Across the full spectrum of communications activities, the need for more skilled manpower stands out as a key requirement. Respondents were unanimous in their sense that this should be a central function of the communications centre. The reasons are not hard to find.

Rapidly growing international and domestic markets for communications products and services that involve a very high level of "value added" mean that demand for skilled manpower is high and competition among firms for these people is intense. The lack of skilled manpower can curb the growth of a firm. CN-CP, for example, according to its President, John Sutherland, has had to forgo export opportunities because of skilled manpower limitations; it needed its experts to work on Canadian projects. The career advertisements in our newspapers give a clear indication of a high and growing demand - a demand which is pushing salaries up at a rapid rate.

In turn, this demand is putting intense pressure on educational institutions to train new people and retrain those presently in the work force so that they deal more effectively with the emerging technologies. The demand for researchers, technicians, program operators, writers, directors and producers who understand the new technologies will be high. This challenge will require new arrangements among private and public sector organizations and educational

institutions. Firms are keenly interested to co-operate with educational institutions to ensure that their growth is not slowed because of lack of skilled manpower and that costs of manpower do not adversely affect their performance. Systemhouse and Mitel are, for example, co-sponsoring a Chair in office automation at Carleton University in Ottawa.

Firms and public organizations see the communications centre as a focal point for the development of such new co-operative arrangements and as a place for training. Firms want access to skilled manpower and to training programs geared to their requirements. Educational institutions want access to training facilities. For example, the CBC is urging the creation of a National Broadcasting and Film School* to produce much needed skilled manpower. In the meantime, Ryerson Polytechnical Institute is responding to the need for manpower by investigating new training co-operative ventures with the CBC. However, for Ryerson to respond effectively to emerging requirements it needs to have access to expertise and facilities.

* Presentation to the Cultural Policy Review Committee, July 8th 1981

One approach to realizing the training objective of a communications centre would be to provide the coordinating services necessary to put in place 'apprenticeship' programs (ie, students completing part of their academic requirements through stints with a corporate/industrial sponsor). Indeed, participation in such training programs might be made a condition of location in or use of the centre and its facilities.

Specialized Facilities and Services

The concept of shared facilities and services was judged important by several respondents. The services and facilities required encompass activities germane to most kinds of communications activities. The following list is illustrative, although it does not reflect financial feasibility considerations:

- special effects studios for television and film production;
- national and international information retrieval system for production information (talent, financial incentives, physical sites, facilities, happenings, etc.);
- state of the art theatres (for film premieres);
- technology demonstration equipment (eg, for spectrum analysis, environmental chamber);
- miscellaneous services (computerized cash flow projections for small, high technology companies; graphic design; word processing).

The larger companies and institutions tend, for the most part, to look after their own facilities and services requirements. But smaller enterprises have so far had to go without certain facilities, or they have had to rely on uncertain access to the facilities of big organizations. Because of the creative and innovative skills that tend to be concentrated among smaller undertakings, there is an evident opportunity to enhance their capabilities by ensuring that they have access to the equipment and services they need. . . probably on a share and pay as you go basis. Conceivably, too, . . . certain major corporations would stand to gain from access to specialized services for which they have only occasional requirements.

Concentration of a number of enterprises and functions within a defined geographical area presents a special opportunity to assess the extent to which individual entrepreneurs can or will develop a range of multi-client services and facilities and the potential need for cooperative ventures among diverse elements of the industry and government to provide valuable but not necessarily profitable facilities and services. One example of the kind of structure that might emanate from review of the latter issue is a tri-level government authority funded and managed centre that operates on a break-even basis to service Toronto communications companies and institutions.

Brokerage and R&D...the need for 'packaging' and effective technological forecasting

The need for some kind of brokerage group that would at once provide intelligence to the communications industry and serve as a mechanism to marry relevant Canadian capabilities in the interest of capturing new markets is illustrated in an example suggested by DVS President John Lowry.

He noted that, because of his company's work for CBS in the digital television area, he was asked by the American broadcaster to provide digital audio equipment. His company does not have that capability and does not have the resources to mount an immediate effort in this area. If a combination forecaster-broker existed, a 'group' that might include institutions as diverse as his own company, CBC, Bell Northern, Telesat, the Communications Research Centre, MacDonald Dettweiler, and Mitel, the opportunity might (a) have been identified in advance of the request for equipment and (b) have been realized through a joint venture involving DVS' digital expertise and another company's audio manufacturing capability.

Lowry believes that there is a real need for on-going forecasting, by companies and institutions with a vested interest in communications technologies and services, relative to high power satellite transmission, high resolution television, and many other areas. Some versions of this are in existence: the Cable Television Research Institute, which

has already compiled a comprehensive description of Canadian manufacturing capability relative to cable television requirements; the Office Communications Research Association, a consortium of Gandalf, Mitel, NABU, and CN-CP, which has as its mandate the development of "office of the future" concepts.

A communications centre could involve creation of a comparable forecasting group, but one which draws on the expertise of diverse elements of the communications industry. The relevance of this kind of initiative bears on the commitment to collaboration that companies and institutions might envisage in deciding to participate in a centre. Part of that commitment could well be establishment of a technology forecasting group with the specific intention of marrying relevant Canadian capabilities where emerging opportunities suggest such a marriage. Further, while most respondents did not envisage their companies undertaking actual research and development within a centre--for reasons of space costs, protection of proprietary information, and the increased competition for skilled staff that flows from such R&D concentration, as has occurred on Route 128 in Boston or "Silicon Valley" in California--it was felt that the various functions of the centre would lead to identification of research priorities...especially in respect of interfaces between different communications technologies and between technology and software. Such priorities, which would be relevant to the needs of many clients, might be investigated on a joint basis within the centre.

6. THE COMMUNICATIONS DISTRICT

A communications centre, as a discrete physical structure or a complex of structures and activities, would be sited within an already existing district that is characterized by considerable concentration of communications resources. In this section of our report we describe the district and developments affecting its present and future character.

Location

The Communications District, as defined by the City's Planning Department, is located immediately west of the financial district of the City of Toronto. It is, therefore, located generally from Simcoe Street on the east to Spadina Avenue on the west and from approximately Queen Street on the north, south to the railway lands and Harbourfront at the water-front in the south.

The Communications District is, therefore, located immediately adjacent to the financial district. This is of vital strategic importance, as the financial district makes extensive use of communications in a variety of applications...including media, transmission of information, computation, data processing and production of material for media, such as advertising.

The Communications District is immediately adjacent to Lake Ontario and Harbourfront and thus to the public focus of those areas. Public facilities include:

- Exhibition Place (Canadian National Exhibition/CNE);
- Ontario Place; and
- the Harbourfront activities, including public activity and the private developments at York, Spadina and Bathurst Quays.

Thus, the Communications District has public orientation and focus to the south.

City Policies

The City of Toronto has responsibility for land use and development within the territory of its jurisdiction. Policies are expressed in a variety of ways, including most fundamentally zoning and development policies.

The financial district has been designated as the high density core with commercial zoning to eight times coverage. The western limit of the core is Simcoe Street and the eastern limit is Victoria Street.

West and east of the core, the density decreases and the zoning or uses shift from predominantly commercial to mixed commercial and industrial and to industrial moving further west and east respectively. The Communications District is characterized by such zoning with a variety of designations including:

- CRL4.5 which is the mixed commercial residential zoning at the maximum density of 4.5 times coverage;
- CRL2 which is the equivalent zoning designation of 2 times coverage;
- I2D7 which is the medium industrial designation at 7 times coverage (includes the light industrial I1 designation);
- I3D7 which is the heavy industrial designation at 7 times coverage (includes the medium and lighter designations as well).

There are areas in the I2 designation in which commercial development is permitted to a maximum of 50 per cent of the amount of industrial activity up to a maximum of 3.5 times coverage commercial at D7.

It is important to note the types of uses provided for under the I1 and I2 industrial designations. I1, for example, includes production of material for the media, studios, etc. I2 includes data processing, etc. The zoning designations are provided in Appendix Eight.

Zoning designations also include broadcasting studios and film studios. Thus, the industrial zoning designations are specifically intended to cover and include the operations of the Communications District. Industrial designation allows for ancillary support office space for industrial activities as well as service related retail activity.

The actual type of uses within the I1 and I2 designations, therefore, may not necessarily be characteristically different in terms of type of space from the type of space experienced in the financial district. The issue is not the type of space per se, but the use of the space. Thus, artists' studios are not necessarily characteristically different from engineers/architects offices, but do not qualify under I1 or I2 zoning.

As a result of these zoning designations, the types of uses that can take advantage of the density permitted are targetted as specific. As general office use cannot be achieved, rents tend to be more restrained compared to premium office rents in the financial district. This provides the basis for the Communications District to accommodate such activity in a highly accessible area immediately adjacent to the financial district, but without undue pressure on operating costs through excessive rents.

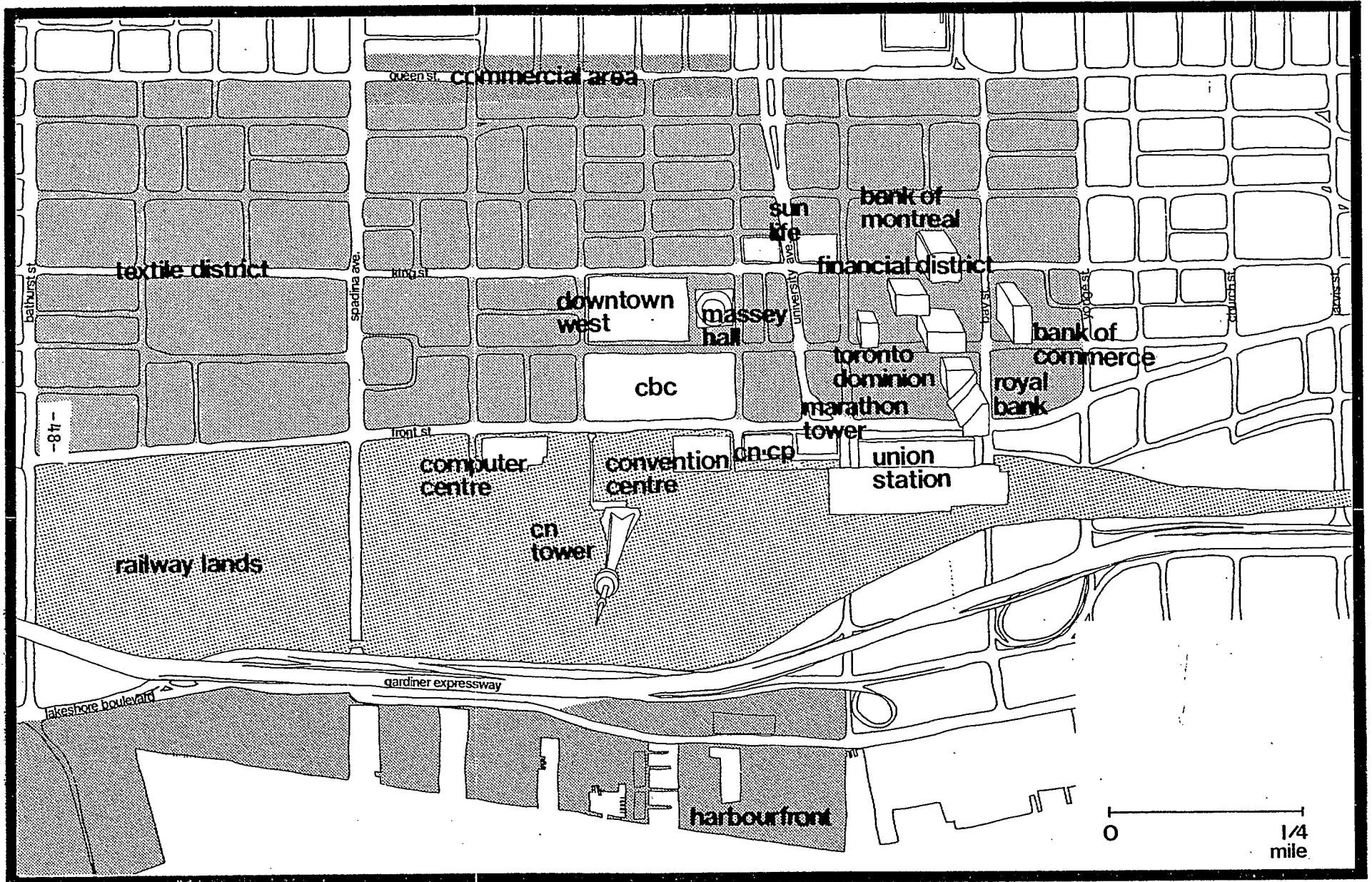
The District is depicted in the map on the following page (Exhibit Eight).

In Appendix Nine, the following is indicated:

- block number;
- current zoning;
- existing gross site area;
- existing floor area ratio, that is site coverage;
- existing gross floor area;

EXHIBIT EIGHT

Proposed Communications District in Downtown Toronto



- permitted site coverage; and
- permitted gross floor area.

Development Pattern

The policies of the City of Toronto and the existing land resources and building resources of the Communications District, combined with market forces of realty development in the financial district, are, in fact, contributing to the achievement of the desired activity pattern of the Communications District.

Development in the financial district limited to 8 times coverage is causing the financial district to move laterally from the focus at King and Bay Streets westward across University Avenue and eastward across Yonge Street to the limits at Simcoe and in the west and Victoria in the east, respectively.

The Sun Life development is the first major commercial office project in recent times that has moved across University Avenue. University Place by Marathon Developments is at the bottom of University Avenue on the west side as well. Similarly, on the east side of Yonge Street, Fidinam Developments and JPM Enterprise are proposing major new office buildings and 33 Yonge Street and the Wellington are new buildings that have been constructed east of Yonge.

Rents in the financial district currently range from \$35 to \$40 per sq. foot for premium bank corporate buildings to \$22 to \$25 per sq. foot for high quality buildings.

These rents are excessive for users who require functional proximity to the financial district, but not the premium costs of high rise construction and high land value associated with the unique commercial zoning of the financial district. Accordingly, these high rents are encouraging such users to locate adjacent to the financial district in the lower rent areas west and east.

There is an emerging trend of many users (including the banks themselves) to locate ancillary functions in "shoulder areas". A prime example is the Royal Bank computer complex. Other data processing concerns are locating west of Simcoe where they qualify as an I2 user and will have rents in the \$12 to \$16 per sq. foot range with almost the same degree of convenience and immediacy to the financial district as those located in the financial district itself.

Similarly, advertising firms, producers of material for the media, studios, and other users are locating in the district. Many of these users are locating in the stock of older warehouse buildings which provide high quality studio and office space with the character that is seen as a truly attractive alternative to new construction space of medium quality. This is encouraging the recycling and improvement of the warehouse stock of buildings.

Thus, zoning has fostered a trend in which market forces are creating the demand and pressure for the development of the Communications District.

Resources and Developments within the District

The Communications District is of extraordinary character within the context of the City of Toronto. The District includes a substantial stock of warehouse/industrial buildings. These buildings, as stated previously, are designated for the light industrial uses that are suited to attracting many of the functions of the communications industry, including media production centres, data processing and other uses.

The District also includes unique attributes of large scale land assembly on the railway lands. These lands are currently used for rail purposes both by CN and CP and other users who have long-term leases. The development of these lands for urban purposes has been the subject of intensive study and public discussion for many years. In the interim, railway activity has continued. These major land holdings, however, are located immediately adjacent to the financial district on the northeast, the communications district to the north and all the public functions at the Toronto waterfront to the south. The lands, therefore, provide a strategic opportunity for. . .

- activity patterns and movement patterns to provide linkage between the City and waterfront;
- relating the public activities of the waterfront through to public activities within the central area, the financial district and the City generally;
- achieving large scale comprehensive development for major private and institutional purposes that cannot be accomplished on smaller sites that are difficult and costly to assemble at today's land prices.

The Communications District has a high degree of accessibility through road-based transportation on the freeway system and public transit transportation including . . .

- the commuter GO system,
- the urban streetcar system, and
- the Metro subway system.

As a result of the high utilization of the transit system in the central financial district and the large scale public activities in Harbourfront, CNE and Ontario Place, the Government of Ontario has committed a \$90 million program for high technology transit (ICTS) for serving this area with connections through to Union Station. This is the subject of a task force of the Province, Metro, TTC and the City examining the potential linkage of this transit line to these areas as well as integrating the line with the overall system. With these developments, the railway lands and the Communications District will have as high a level or an even higher level of accessibility than the central financial district.

Within the District, some major new developments are occurring that expand this base. New Massey Hall is a vital new development located within the Communications District, for example. The program intended for the Hall is described earlier--an aggressive approach to provision of opportunities not only for symphonic presentations, but also entrepreneurial ventures in respect of broadcasting and 'further use' (eg. audio recordings).

The Convention Centre is a new development that is committed to be underway shortly within the Communications District. It is located on the immediate south side of Front Street, west of Simcoe, one block south of Massey Hall. This centre, in conjunction with a hotel and office building, will provide for accommodation of major public functions, demonstrations, promotion and marketing. It will bring more intensified public focus and participation to the District.

Within the Communications District south of the railway corridor is the existing CN Tower. This tower has a technological function, but has also provided a public recreation function with the viewing platform. It is attracting very substantial numbers of visitors and Toronto-based public interest which will be naturally complemented by the Convention Centre hotel and other public functions in the Communications District to the north and Harbourfront/CNE/Ontario Place to the south and southwest.

Thus, the Communications District comprises the following:

- large scale lands available for comprehensive and major development;
- unique facilities that serve the entire region, such as the CN Tower, Convention Centre and Massey Hall;
- small scale warehouse buildings with designations appropriate to the communications industry.

The District, therefore, provides the opportunity for major comprehensive development for capital intensive new facilities as well as modest low-cost development of support industries or newly emerging industries. The District is strategically located adjacent to the financial district and waterfront with excellent transportation and accessibility that will be significantly improved through the ICTS program.

Suitability of Location in Toronto

The Communications District is clearly, therefore, a suitable location for the communications centre described earlier in this report, in the context of continued growth and intensification of communication activities in Toronto.

The land resources and existing building resources of the District provide for ready accommodation of the full range of activity from comprehensive large-scale new development through to incremental

small-scale, modest priced development for support activities and industries just starting up. Indeed, these resources are not only of importance, they are uniquely located in the District within the context of the City of Toronto development priorities.

The District is immediately contiguous to the major users in the financial district immediately to the east.

The District is immediately located adjacent to the public activities of CNE, Ontario Place and Harbourfront to the south.

The District has unique activities related to communication functions today including Massey Hall, the Convention Centre, the CN Tower.

Many of these functions provide:

- international exposure, for example through the Convention Centre;
- high recognition of the site location through the CN Tower;
- major public participation through orchestral presentations in Massey Hall.

The Communications District is, therefore, established in the public mind as a place where such things happen and where a comprehensive communications program logically would be achieved.

A pattern of development of activities within the district is now underway, and users in the financial district relative to such communications functions as computing, data processing, and media production are relocating within the District.

7. COMMUNICATIONS DISTRICT AND PUBLIC POLICY

The Communications District is arising from the natural market locational forces as well as a direct result of public policy encouraging such activity.

Relevant policies can best be described in terms of:

- communications industry and policies;
- economic development and policies;
- physical development in terms of both land use and transportation.

Communications Industry

The five main programs described in our review of industry reaction to the concept of a communications centre are evidently consistent with government emphasis on the development of skill-intensive industry, enhanced international marketing, and a need to develop complementary policies in respect of technological and socio-cultural dimensions of the communications sector. Existing and planned developments in Toronto provide a unique opportunity to realize policy aspirations in the communications sector in a concrete, high profile way.

Briefly, we have the opportunity within the Communications District that is emerging, in conjunction with major facilities that are already sited there, to achieve a comprehensive broad program of development in a centre that will relate to activities and enterprises throughout the District. Indeed, the centre could take the form of a complex rather than a single building, it could involve:

- major new capital intensive developments on large land assemblies that are available for such purposes;
- incremental small scale development in warehouse buildings as per the current market trend;
- operational, programmatic linkages between the various resources in place and those that will come to be in place.

We believe, in view of industry response to the communications centre concept, that such a complex will be very attractive to many components of the industry. Industry will not necessarily relocate existing facilities there, but can be expected to locate components of existing facilities and new growth in the area...fostering an exciting environment and reinforcing economies of scale. Such an approach could also help in resolving certain outstanding financial problems in respect of any one of the developments moving forward on their own (eg, the CBC).

Economic Development

Economic development is of fundamental interest to all levels of government concerned with the general economy of Canada, Ontario and Toronto.

A communications centre will reinforce industry capabilities and could have significant economic benefit. It is a logical extension of commitments by the government of Ontario--for example, the BILD program, whereby an estimated \$200 million has been allocated to stimulation of growth industries. Such industries are centrally involved in. . .

- information/entertainment products and services
- new technology applications, such as the "office of the future";
- transportation applications.

The communications centre, considered in the context of a complex of activities, is, therefore, an opportunity to bring the marketing and R&D functions of these industries together in a suitably located showcase for demonstration. It is not intended or contemplated that production or actual R&D establishments be located there, as most industries will wish to maintain existing advantages of privacy and low cost space, but that product and institutional demonstrations and marketing would benefit substantially from this public location.

Physical Development

The pattern of physical development is of interest to the public agencies concerned with land use--that is, City of Toronto, Metro Toronto and the Province, as well as transportation interests, servicing facilities and, of course, the landowners in the area.

The City has fostered policies for the Communications District to encourage such functions to locate there. The City has broader objectives as well, which we understand include. . .

- linking the City and the waterfront;
- achieving a continuous activity pattern of public-related activity from the central financial district through the convention centre, Massey Hall through to Harbourfront, CNE and Ontario Place;
- providing a pedestrian network and public open spaces.

The concept outlined above is consistent with and supportive of these objectives.

8. CONCLUSIONS

The Centre Re-defined

Industry reaction to the original concept, review of new and planned communications initiatives, and assessment of transportation and development issues in Toronto suggest an opportunity to site a physical centre and/or complex of activities in the south-central region of the city. Such a centre, which could serve as a home for the proposed Guild Hall as well as other groups with an interest in siting operations within a high profile physical structure, would be designed to complement and serve the activities of Toronto-based communications enterprises.

Programatically, the centre can be described in terms of the five categories of need identified by industry spokesmen--namely, marketing, institutional relations, training, specialized facilities, and brokerage and R&D. Physically, these programs translate into. . .

- sales offices;
- exhibition/demonstration hall;
- special exhibition facilities (eg, screening rooms);
- office space and relevant administrative support facilities;
- film and television production and post production facilities;
- other special facilities (audio recording, test equipment, computerized information services).

The scope and scale of the centre--and its feasibility--are evidently predicated on the economics of site availability and acquisition, physical construction, and use. These issues, in the context of city development criteria, provincial transportation and industrial planning, and federal communications policy, are proposed as the parameters of a second phase of study by Nordicity Group and IBI Group.

Appendix One

A Communications Centre in Toronto (Concept Paper)

OBJECTIVE

To establish a centre of excellence for Canadian leading-edge communications expertise and technology in downtown Toronto within the context of Federal and Provincial industrial strategies for Canada's communications and cultural industries sectors.

BACKGROUND

Nordicity Group Ltd. and the IBI Group are collaborating in the preparation of an initial phase of feasibility study of the concept of a communications centre in Toronto. This study is being undertaken for the Ontario Ministries of Industry and Tourism and of Transportation and Communications, and for the Federal Department of Communications.

The Communications Centre concept is based on the fact that Toronto is very much Canada's communications and entertainment centre. Business, financial institutions, broadcasting companies, film production companies and so on operate here. They all have requirements for the latest communications expertise. Since Canada has much to offer in this domain, it is normal to try to find a fit between the users and suppliers of communications expertise.

The Communications Centre is based partly on the potential of CBC's possible new broadcast centre as a "core" element of a communications centre. The CBC is not, of course, by itself sufficient to achieve the full potential of local and national growth which the communications industry promises, but its operations could constitute a "core" production facility as well as a "critical mass" customer for Canadian equipment, services and program suppliers.

The strategy, therefore, proposes the grouping together of facilities into a complex which would accommodate and thereby provide interface for various components of the industry, including research, development demonstration, and commercial activities, as well as production, sales, and distribution.

Such a grouping would permit joint or common use of certain facilities which would enable all the users to benefit. One type of benefit would be improved facilities (as a result of greater utilization) than the CBC of and by itself might be able to justify.

The more substantial benefit in the mid term would be the synergism between various public agencies and private companies in the industry with the objective of increasing competence in communications technologies, thereby improving their relative positions in the marketplace.

A substantial number of companies could be interested in such a communications centre. The fundamental requirement now is to determine:

- the possible extent of their interests; and,
- the basis on which they could be interested in institutional, operational and financial terms.

THE CONCEPT

Toronto has a communications district. At the core of this district is envisaged a Communications Centre that would encompass a complex of buildings housing:

- research facilities of communications oriented firms (eg., Northern Telecom, Cable Research Institute);
- permanent operations of communications firms (eg., CBC, CN control operations, pay-TV uplink);
- permanent communications related displays provided by firms and government agencies (eg., Ontario Science Centre could offer a "hands on" communications related display);
- temporary displays provided by firms and government agencies (eg., Telidon technology; TVO educational technology);
- offices of related industry associations (eg., Canadian Advanced Technology Association);
- related government offices (eg., Federal Department of Communications; the Ontario IDEA Corporation);
- related university offices (eg., University of Toronto Innovation Foundation; University of Waterloo Innovation Centre);
- educational and training facilities (eg., National Broadcasting and Film School);
- offices of export promotion agencies of the Federal and Ontario governments;
- representational and sales offices of firms involved with program production and distribution (eg., Infomart, Nielsen-Ferns).

The communications system throughout the complex would be the most advanced, reflecting the philosophy behind the concept. In this way, the Centre itself would become an attraction. Central facilities would be needed for smaller firms

and for temporary displays and demonstrations. These facilities might include:

- the central offices of the Communications Centre;
- secretarial pool;
- computer facilities;
- machine shop and technical staff;
- conference rooms including audio visual conferencing facilities;
- theatres;
- library (electronically based);
- fully equipped demonstration booths;
- industrial design facilities (eg., including CAD);
- educational and training facilities.

NETWORKING

From this base, a network of relationships would be established across the country and abroad with clients, suppliers, universities and government agencies. Since the aim is to maximize the use of the total Canadian communications capability, special emphasis would be placed on supply/demand, university/industry, and government/industry interfaces - the transfer of expertise across these interfaces is extremely important. Also a tightly knit communications focal point in Toronto facilitates the integration of related expertise from other sectors.

The most immediately accessible market is the service sector of the Toronto business community (eg., Toronto Stock Exchange, banks, offices, broadcasters). This important market base can be used for initial large scale demonstrations of specific communications technologies and products.

The Ontario-based universities and colleges would provide the communications related educational and training programs that would generate the skilled manpower much needed by the industry.

The Federal, Ontario and Toronto Municipal governments would provide the necessary incentives to attract desirable firms to the Communications Centre. More specifically, firms the the complex would be encouraged to innovate through procurement contracts involving long range R&D. In this way, governments would be the initial test beds of new communications technologies and be seen implementing their own industrial strategies in a "hands on" fashion.

KEY ACTORS

Key actors wanting to occupy or to have access to the Communications Centre would include:

- financial institutions (eg., TSE);
- business sector (eg., investment houses);
- information providers (eg., Infomart);
- government departments and agencies;
- entertainment sector (eg., pay-TV network);
- advertisers;
- broadcasters (eg., CBC; TVO);
- electronics companies (eg., Northern Telecom);
- cable companies;
- telecommunications companies (CNCP);
- TV and film production firms (eg., Nelvana, Neilsen-Ferns);
- educational institutions (eg., Ryerson);
- government laboratories (eg., CRC);

- film studios (eg., Magder) ;
- studios (eg., CFTO, Global);
- recording studios;
- post-production houses.

BENEFITS

a) For Industry

- access to leading edge developments;
- ability to demonstrate developments to key actors with minimum effort;
- access to major users;
- flexibility (permanent versus temporary space);
- access to common services;
- access to skilled manpower;
- access to government and university resources;
- increased chances of securing contracts.

b) For the Federal Government

- implements its industrial strategy
- provides a focus for directing R&D and industrial development support;
- provides a focus for transfer of technology from government laboratories to industry;
- provides a focus for contracting out and procurement policies.

c) For the Province of Ontario

- supports the communications sector as a sector of strategic importance;
- catalyst for the implementation of the BILD program;
- stimulates other industrial strategy objectives (eg., World Product Mandating);
- moves industry towards the new high growth sectors essential to restructuring Ontario's industrial base;
- ties the educational system more closely to industrial needs;
- attracts talent and skills;
- stimulates new revenue stream;
- promotes Ontario as a dynamic province.

d) For the City of Toronto

- catalyst for restructuring the City's industrial base around leading edge growth industries;
- reverses trend of relocation outside the City;
- increases chances of Toronto-based companies of providing necessary services for a growing number of head offices;
- stimulates a new revenue stream;
- promotes Toronto as a dynamic growth centre;
- provides a concentration of quality business skills.

It's a WIN situation for all key actors.

Appendix Two

List of Interviewees

W. Armstrong	General Manager Roy Thompson Hall, Toronto
G.S. Bloxam	Vice-President Sales Infomart, Toronto
H. Brune	Executive Director Office Communications Research Assoc., Ottawa
P. Bowers	General Manager, Operations TV Ontario, Toronto
R. Clasen	Vice-President, U.S. Operations Rogers Cablesystems, Toronto
A. Clayton	Senior Writer CTRI, Ottawa
S. Cornell	Vice-President, Public Relations, Canadian Cable TV Assoc., Ottawa
N.E. Davidson	Program Manager Planning & Development City of Toronto, Toronto
Marcel Deschamps	Vice-President, Planning CBC, Ottawa
P. Desroches	Executive Vice-President CBC, Ottawa

Appendix 2 cont'd

D. Doyle	President Nabu Manufacturing, Ottawa
N. Garrick	Assistant General Manager, Television CBC-ESD, Toronto
J. Gibson	Vice-President, Public Affairs CN-CP Telecommunications, Toronto
A.M. Gifford	Vice-President, Academic Ryerson Polytechnical Institute, Toronto
B. Greenleaf	Vice-President, Advanced Tech. Systemhouse, Ottawa
D. Hall	Executive Vice-President, Marketing & Tech. Northern Telecom Limited, Toronto
A. Johnson	President CBC, Ottawa
R. Keast	Chairman, Radio Arts Dept. Ryerson, Toronto
A. Lehman	Chairman, Guild Hall Project Toronto

Appendix 2 cont'd

L. Lehman

President
Directors Guild of
Canada,
Toronto

R.M. Lester

Vice-President
Business Development
Telesat Canada,
Ottawa

P. Lind

Senior Vice-President
Programming & Planning
Rogers Cablesystems,
Toronto

R. Long

Executive Director
CATA,
Ottawa

J. Lowry

President
Digital Video Systems,
Toronto

J. McAndrew

President
McAndrew Productions,
Toronto

E. McCurdy

President
McCurdy Radio Industries,
Toronto

B. Milne

Planning & Development
City of Toronto

D. Mintz

President
Global TV Network,
Toronto

P. Mortimer

Film Advisor
Cultural Industries
Branch
Ministry of Culture &
Recreation,
Toronto

Appendix 2 cont'd

D. Nielsen	Chairman Primedia Productions, Toronto
P. Novack	Head of Applied Arts Ryerson, Toronto
P. Parkinson	Contributing Writer CTRI, Ottawa
B. Robertson	President Canadian Recording Industry Assoc., Toronto
P. Sloan	Vice-President Economic & Public Affairs Toronto Stock Exchange Toronto
L. Sperling	Assistant Deputy Postmaster General (Marketing), Ottawa
J. Sutherland	President CN-CP Telecommunications, Toronto

Appendix Three

The Distribution of Selected Production Companies and Related Services in Downtown Toronto



Appendix Four

The Elgin/Wintergarden Theatres

In November of last year the Minister of Culture and Recreation announced a plan for the resurrection and the restoration of the historic Elgin/Wintergarden theatre complex in Toronto. In collaboration with a private sector consortium comprised of Tiberius Productions Incorporated, Cineplex Corporation and W.B.C. Productions Ltd. the Ministry will undertake to refurbish the existing theatre complex with a view to preserve its unique characteristics. Under the terms of the collaborative agreement, the consortium will:

- invest at least \$4 million to restore and renovate the theatres;
- operate the two live theatre facilities in accordance with certain Canadian programming conditions (set out in the programming policy document);
- contribute to a Theatre Development Trust (designed to assist the development of live theatre in Ontario);
- operate and maintain the facilities for the period of the lease. In return the Ministry will award the consortium a lease of 40 years at a rent of \$1/year.

Work is expected to begin by September of 1982 with the completion date set for December 1983.

Appendix Five

The New Massey Hall

The need for a new Massey Hall grew partly out of the inadequacies* of the existing Massey Hall, particularly the acoustical inadequacies. As the new permanent home for the Toronto Symphony and the Mendelssohn Choir, the new Massey Hall will have adjustable acoustical banner installations for control of sound reverberation, and total acoustical isolation from interior and exterior noise.

Located on a 2.5 acre site bounded on three sides by King, Simcoe and Wellington Streets, the new Massey Hall with its curvilinear glass canopy exterior will house a main auditorium (2,800 seats), a rehearsal hall, musicians' support areas, music libraries, change rooms and offices. The site on which the new Massey Hall is being built was made available by Marathon Realty** on a favourable, long-term lease basis. In addition, Marathon will maintain a 1.5 acre park adjacent to the Hall. Funds for the construction of the new Massey

* The existing Massey Hall, a late-19th century building, has seriously inadequate facilities affecting both performers and audiences. Stage acoustics are so poor the musicians cannot hear one another. Some seats are behind columns with no sight lines. City noise penetrates the buildings. There is no air-conditioning.

** A wholly owned subsidiary of Canadian Pacific Enterprises Limited.

Appendix 5 cont'd

Hall have been provided by the Federal Government (\$9 million), the Provincial Government (\$12.5 million), Metro Toronto Council (\$5 million), and by private contributions (\$12.5 million).

Appendix Six

Guild Hall Project

The development of Guild Hall was initiated in 1979 by Annie Lehman based in part upon her experience with the Swedish Film Institute. The original Guild Hall concept envisaged a facility that would function as a market place, a meeting place, and as a show place.

As a market place, Guild Hall could bring together, under one roof, a diversity of skills and talents contributing to film, television, and the performing arts. In this capacity Guild Hall could provide office space for guilds, associations, talent unions, the NFB, independent producers and post-production specialists.

As a meeting place, Guild Hall could provide facilities (eg. restaurants, lounges and conference room) which will be conducive to expression and communication among various members of the creative community.

As a show place, Guild Hall could provide one to three state-of-the-art preview theatres (50 to 75 seats), reference and archival libraries where art histories, trade periodicals, technological papers, magazines, records and musical scores will be available.

In addition, Guild Hall could provide a museum for those who are interested in Canada's cultural past (The NFB has expressed an interest in housing its vast stills collection in Guild Hall.).

Guild Hall of Canada

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Mr Laurie Edwards
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Dear Laurie,

It would seem once the wheel is about to be invented, it is determined to exist with us or without us. While the Communications Centre you are beginning to define in your report and the Guild Hall concept are far from the same thing, they are very much parts of an information and technology wheel which is in fact about to come into being and which we must either direct or see run away from us.

Not since Leacock suggested the possibility of running off in all directions has the need to define and centralize a new group of forces been so clear. Certainly the approach of your group is broader than the one taken by Guild Hall, but we think whatever the differences a number of the suggested features and expected benefits are strikingly complementary.

Beginning from a narrower base which limited Guild Hall's concerns to "Performance Based Industry" (PBI)*, we were readily able to identify a constituency for the concept and we received specific responses from this constituency as to what kinds of programs are needed. These programs, as you know, confirm your groups sense of required activities.

In part because of our narrower focus we have been able to travel quite a ways toward defining such specifics as the square footage required for needed programs, the cost of many

* (a somewhat awkward term which seeks to include music, theatre, film and television while attacking the commonplace distinctions and misconceptions suggested by older terms such as "The Entertainment Industry", "Show Business, "The Cultural Industries" et all)

of these programatic units and beyond this to asses the financial feasibility of the Guild Hall Building.

As you know, our feasibility study is now in draft and due to be released soonest.

Two things strike us about your report:

First, in a way quite different from anything anticipated by Guild Hall, you intend the involvement of industrial users and the Centre not only expects to benefit them it anticipates they will be major users of its facilities.

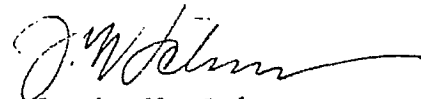
Guild Hall has from the beginning involved the organizations which represent people who work in PBI as distinct from companies: vis: CAPAC (Composers, Authors and Publishers Association of Canada Ltd) not a specific music company. This results in a real difference, which has impact on the public/private mix of the two projects. Guild Hall is essentially neutral in its approach to the public sector. To the extent the organizations within Guild Hall are supported or involved with the public sector Guild Hall is involved, but this involvement while expected is not a cornerstone. The Communications Centre sees the public sector to be very much an essential component.

Unmentioned in either report is a common approach which we would like to mention here. Both seek to ensure technology is designed to service human needs. This may seem too obvious to mention but in many, many ways we are constantly confronted with the notion that we should adapt to technology and in my own profession design change which is technologically based as opposed to task or human based normally takes five or more years to correct.

To the degree that you can succeed in focusing technological change along human lines we think your proposed Centre will fill not only a real need, it will be unique.

Would it not be a supreme achievement and a threshold moment in human affairs to invent the wheel only once?

THE COMMITTEE FOR GUILD HALL OF CANADA



Lewis W. Lehman

Appendix Seven

Excerpts from the Imax Brochure

Imax is a high fidelity motion picture system that uses state-of-the-art technology to create an image of unsurpassed clarity and impact. Conceived and developed by a group of Canadian entrepreneurs, the Imax system received international acclaim at Osaka's 1970 Exposition.

The technical requirements of the Imax system gave birth to a new projector incorporating the unique Rolling Loop,* a totally new camera to shoot films specifically for the Imax system, and a new theatre (with an unusually large screen, about 75 x 100 feet) designed to accommodate from 375 to 1,000 people.

Since its inception in 1970, two Imax theatres have been built in Canada (Cinesphere, Ontario Place and the Imax Theatre, Pyramid Place) and nine in the U.S. and South America.

Today, the Imax System Corporation has its headquarters in Toronto and a manufacturing plant in Oakville where Canadian expertise is employed in research and development, and in the design of Imax theatres in cooperation with customers from around the world.

* A mechanism that pushes the film in gentle, caterpillar-like moves.

Appendix Eight

Zoning Designations

SECTION 5 - G DISTRICTS

- (1) No person shall, within any G district, use any *lot* or erect or use any building or structure for any purpose except one or more of the following G uses, namely:
- (a) a *public park*, including therein one or more athletic fields, field houses, *community centres*, bleachers, open or closed swimming and wading pools, green houses, botanical gardens, zoological gardens, band stands, skating rinks, tennis courts, bowling greens, boat liveries, bathing stations and refreshment rooms, an ornamental structure;
 - (b) a *public playground*;
 - (c) a *playlot*;
 - (d) a *golf course*;
 - (e) any use which is *accessory* to any of the foregoing uses. (857-80)
- (2) None of the provisions of subsection (1) shall apply to prevent the erection and use of community information boards by the *Corporation* or any local board thereof as defined by The Municipal Affairs Act, R.S.O. 1970, chapter 118, provided:
- (a) the display area of each side of the community information notice board is not more than 2.5 square metres; and
 - (b) the *height* of the community information notice board including the supporting structure, is not more than 2.2 metres above ground level. (549-80)

SECTION 12A - CR DISTRICTS

- (1) No person shall, within any CR district, use any *lot* or erect or use any building or structure for any purpose except any G use or one or more of the following CR uses:

(a) RESIDENTIAL USES:

(i) HOUSING COMPRISED OF DWELLING UNITS:

senior citizens housing, single persons housing, or one or more dwelling units in a building containing uses permitted in CR districts; a one family dwelling house, a semi-detached dwelling house, a duplex dwelling house, a double duplex dwelling house, a triplex dwelling house, a double triplex dwelling house, a converted dwelling house, row housing, an apartment house;

(ii) SHARED HOUSING CONTAINING DWELLING ROOMS:

one or more *dwelling rooms* in a building used for purposes permitted in CR districts; a *nursing home, convalescent home or rest home; a residential care facility* occupying the whole of a fully detached building, provided it is located at least 245 metres from any other *residential care facility*, a *crisis care facility* which occupies the whole of a fully detached building or, in the case of a *mixed use building*, occupies the whole of the residential portion of the building, provided it is located at least 245 metres from any *residential care facility* located in an R district;

a monastery, a nunnery or religious retreat, a residence owned and controlled by the Salvation Army, Y.M.C.A., Y.W.C.A., Y.M.H.A., or Y.W.H.A.; a *boarding or lodging house; a home for the aged; a hostel; a university residence;* (831-78) (694-79)

(iii) INCIDENTAL RESIDENTIAL USES:

a *private garage or parking station* incidental and subordinate to a residential use referred to in sub-paragraphs (i) or (ii), and located on the same *lot*; any use that is *accessory* to a residential use referred to in sub-paragraphs (i) and (ii) of this paragraph, (335-78) (883-78)

(b) NON-RESIDENTIAL USES:

(i) COMMUNITY SERVICES AND FACILITIES:

a public or separate elementary school, a high school or secondary school; a *community centre, a municipal community centre;* municipal baths and swimming pool, a bathing station; Y.M.C.A., Y.W.C.A., Y.M.H.A., Y.W.H.A.; a *day nursery, a nursery school, a playlot; a church; a community health centre;* premises of a *charitable institution, non-profit institution* or other community or social agency used for the purpose of providing a community service such as, but not limited to, employment, immigration, counselling, welfare or legal services; a *union hall a public library, a public art gallery or a public museum* having a *non-residential-gross floor area* not exceeding 1394 square metres; any use that is *accessory* to a use otherwise permitted by this subparagraph; (493-79) (681-78)

(ii) GENERAL INSTITUTIONS:

a *private academic, religious or philanthropic school*; a technical school, a vocational school, a college or university; a UOS use; a military academy; the Conservatory of Music; a Bible Institute, a religious library or reading room; a polytechnical institute; a *private hospital, a public hospital, a psychiatric hospital*, facilities operated by the Alcoholism and Drug Addiction Research Foundation, a doctor's office located in a building operated by or on behalf of any one or more of them; a public hall for use for lectures, meetings or for art exhibits, concerts or other displays or performances of a cultural nature; a *public library, a public art gallery or a public museum having a non-residential gross floor area greater than 1394 square metres*; a police station, a fire hall, an armoury or drill hall, an observatory; premises of a *charitable institution or non-profit institution* other than those described in subparagraph (i) of this paragraph; and a seminary or religious mission; in the case of a college or university (including The Royal Conservatory of Music) any use that is naturally and normally incidental, subordinate and devoted to the principal use of such college or university (including The Royal Conservatory of Music); and in the case of any other *general institutions*, any use that is *accessory* to it. (493-79) (592-79) (693-79) (745-79)

(iii) LOCAL RETAIL AND SERVICE SHOPS:

a grocery shop, a *bake-shop*, a butcher shop, a delicatessen; a pharmacy, a variety or smoke shop, a newsstand, a hardware shop; a **branch of a bank or financial institution**; an *eating establishment*; a box lunch shop, a *tavern or public house*; a shoe repair shop, a shoe shine shop, a *tailor's shop, a dry cleaning shop, a dry cleaner's distributing station, a laundry shop*; a barber shop, a ladies hairdressing establishment; a book store, a florist shop; (817-80)

(iv) GENERAL RETAIL AND SERVICE SHOPS:

a retail store, a pawnbroker's shop, a secondhand shop, a *dressmaker's shop, a pet shop, a real estate sales office; a photographer's shop, a travel agent; a sample or showroom, an auctioneer's premises; a service and repair shop, a locksmith's or gunsmith's shop, a taxidermist's shop, an upholsterer's shop, a spotting and stain removing establishment; a duplicating shop, an industrial computer service, a data processing establishment, a security service*; (681-78) (831-78) (150-80)

(v) an office, a *government office, a business office, a newspaper plant, a post office*, an administrative office of a *non-profit institution* of a religious, educational, recreational, fraternal or philanthropic nature; (681-78)

(vi) WORKSHOPS AND STUDIOS:

a *custom workshop, a laboratory Class A, an artist's or photographer's studio, a film or recording studio, a motion picture studio, a T.V. studio, a printing plant* in which not more than ten persons are employed; (681-78) (831-78) (511-79)

(vii) PLACES OF AMUSEMENT AND ASSEMBLY:

SECTION 12A - CR DISTRICTS

a billiard or pool room, a bowling alley, a *private art gallery*, a *club*, a *place of amusement*, commercial baths; (681-78) (831-78)

(viii) AUTOMOBILE RELATED USES:

an *automobile service station*, a taxicab stand or station, a *parking lot*, a *parking station*, a *private parking garage*, a *car washing establishment*, a *sales or hire garage*, a *motor vehicle repair shop, class A*, an *automobile service and repair shop*; (681-78)

(ix) MISCELLANEOUS NON-RESIDENTIAL USES:

a *hotel*, a *tourist or guest home*, a *cold storage locker plant*, an *undertaker's establishment*, a *commercial school*, a *clinic*, an *animal hospital*, a *massage establishment*, an *ornamental structure*, a *craft school*, a *trade school*; (681-78) (831-78)

(x) SIGNS:

a wall sign, window sign, projecting sign, ground sign, a banner sign or other sign, notice or advertising device;

(xi) any use which is *accessory* to any of the uses referred to in sub-paragraphs (ii) to (ix) inclusive.

(2) NON-RESIDENTIAL GROSS FLOOR AREA:

(a) None of the provisions of paragraphs (c) and (f) of sub-section (12) of Section 4 shall apply to prohibit the use, or erection of a building or structure on a *lot* in a CR district having a greater *non-residential gross floor area* than that permitted by the said paragraphs in a *non-residential building* or in a *mixed-use building* in the zone which the *lot* is located provided that:

(i) such additional *non-residential gross floor area* is used for the purposes of one or more community services or facilities as referred to in sub-paragraph (i) of paragraph (b), subsection (1) of this Section, and does not exceed the relevant floor area as set out below:

<u>Density Zone</u>	<u>Additional Non-Residential Gross Floor Area</u>
U100, U150, U200 and U250 zones	0.2 times the area of the <i>lot</i>
U300 zones and L1 U350, L2 U350 and L3 U350 zones	0.4 times the area of the <i>lot</i>
L4 U350 zones	0.5 times the area of the <i>lot</i>
L4.5 U350	0.65 times the area of the <i>lot</i>
L4.5 U480 and L5 U480 L8 U400 and L8 U480 zones	0.8 times the area of the <i>lot</i> ; or

SECTION 12A - CR DISTRICTS

(831-78) (493-79) (592-79) (745-79)

- (ii) such building is located on a *lot* in a U300, U350 or U480 zone and such additional *non-residential gross floor area* is used for the purposes of a *hotel* provided that the sum of the total *non-residential gross floor area* in square metres plus the number obtained by multiplying 100 times the number of *dwelling units* contained in such building does not exceed the value of the constant prescribed below for the density zone in which the *lot* is located:

<u>Density Zone</u>	<u>Constant</u>
U200 and U250 zones	3.5 times the area of the <i>lot</i>
U300 zones	4.0 times the area of the <i>lot</i>
L1 U350 and L2 U350 zones	4.0 times the area of the <i>lot</i>
L4.5 U350 zones	6.5 times the area of the <i>lot</i>
L4.5 U480 zones	7.8 times the area of the <i>lot</i> ; or

(831-78)

- (iii) such building is located on a *lot* within the *Central Core* and such additional *non-residential floor area* is used for the purposes of one or more pedestrian walkways that meet all of the following standards:

- (1) provide direct access between *streets*, parks, public buildings, and/or other public spaces or between any such space and a similar walkway in an adjacent building, a *common outdoor space* or a T.T.C. subway station;
- (2) are located within 5 metres of *grade*;
- (3) are no narrower than 3 metres at any point; and
- (4) are not used for any commercial purposes, including *hotel* lobbies, retail areas, commercial display areas or other rentable space;

or is used for the purposes of one or more washrooms or sitting areas that have access to such walkways.

- (b) (i) Notwithstanding the provisions of paragraphs (c) and (f) of subsection (12) of Section 4, no person shall erect or use a building or structure on a *lot* in an L4.5 or L8 zone in which the *non-residential gross floor area* used for one or more commercial purposes referred to in subparagraphs (iii) to (viii) inclusive of paragraph (b) of subsection (1) of this Section, exceeds the amount prescribed for the density zone in which the *lot* is located by the following table:

SECTION 12A - CR DISTRICTS

Density Zone	Maximum Non-Residential Gross Floor Area
L4.5 zone	4.2 times the area of the lot
L8 zone	7.7 times the area of the lot

(493-79)

(ii) None of the provisions of sub-paragraph (i) shall apply to prevent the erection or use of additional *non-residential gross floor area* for commercial purposes to that permitted by subparagraph (i) on a lot in an L4.5 or L8 zone which lot contains *street-related retail and service uses*, provided that such additional floor area does not exceed the lesser of:

1. 0.3 times the area of the lot; or
2. the floor area determined by the following formula:

$$\text{Floor Area equals } \frac{1}{2} \times \frac{\text{the aggregate length of the portions of the frontages of the lot which face street-related retail and services uses}}{\text{the aggregate length of the frontages of the lot}} \times \text{the area of the lot,}$$

(493-79)

(iii) For the purposes of this subsection, the term "*street-related retail and services uses*" means one or more of the shops or stores referred to in subparagraphs (iii) and (iv) of paragraph (b) of subsection (1) of this Section, provided that:

1. a principal entrance of any such shop or store is located in the exterior wall of the building, and is directly accessible by pedestrians walking along a route having a distance of not more than 5 metres from:
 - A. a *frontage* of the lot on which such shop or store is located; or
 - B. a building setback line on the lot on which such shop or store is located, provided that the line is established by the aforesaid By-law No. 20623, as amended from time to time, or is established in plans or drawings which are approved by Council under an amendment to the aforesaid By-law No. 20623 enacted pursuant to Section 35a of the Planning Act, as amended from time to time;
2. a principal entrance of any such shop or store is located no more than 2 metres above or below *grade*;
3. repealed by by-law 836-79

SECTION 12A - CR DISTRICTS

- (iv) For the purpose of this subsection and of subsection (5) of this Section, the term *frontage* means a *lot* line or part thereof which is also the limit of a *street* allowance more than 6 metres in width or is also the limit of a *public park*;
- (v) For the purposes of this subsection, a *frontage* of a *lot* faces *street-related retail and service uses* if the exterior wall of the portion of the building which contains such *street-related retail and service uses* is located at an angle of divergence from the *frontage* of not more than 85 degrees; (831-78)
- (c)
 - (i) Notwithstanding the provisions of paragraphs (c) and (f) of subsection (12) of Section 4, no person shall erect a building on a *lot* in an L4.5 zone located in the *Central Area* in which the *non-residential gross floor area* used for commercial purposes, as referred to in sub-paragraphs (iii) to (viii) inclusive in paragraph (b) of subsection (1) of this Section, exceeds 46 500 square metres; (831-78)
 - (ii) None of the provisions of sub-paragraph (i) above shall prevent the erection or use of a *mixed-use building* on a *lot* in an L4.5 zone in which the *non-residential gross floor area* used for commercial purposes exceeds 46 500 square metres, provided that the number of *dwelling units* in such building is no fewer than that required by the following table:

<u>Non-Residential Gross Floor Area of Commercial Uses in the Building</u>	<u>Minimum Required Number of Dwelling Units in the Building</u>
not greater than 2.0 times the area of the <i>lot</i>	110 <i>dwelling units</i> per hectare of <i>lot</i> area
greater than 2.0 times but not greater than 3.0 times the area of the <i>lot</i>	215 <i>dwelling units</i> per hectare of <i>lot</i> area
greater than 3.0 times but not greater than 4.5 times the area of the <i>lot</i>	325 <i>dwelling units</i> per hectare of <i>lot</i> area

(831-78)

- (d) None of the provisions of paragraphs (a), (b) and (c) of this subsection shall apply to prevent the erection of a *mixed-use building* containing *dwelling rooms* provided that the aggregate of the number of *dwelling rooms* and any *dwelling units* in such building does not exceed the number of *dwelling units* permitted by the said paragraphs (a), (b) and (c).
- (e) Notwithstanding the provisions of paragraphs (c) and (f) of subsection (12) of Section 4, on a *lot* in a CR L2 U350 zone located within the area bounded by Gerrard Street, Jarvis Street, Queen Street East and Yonge Street, no person shall erect or use a *non-residential building* or a *mixed-use building* in which the portion of the *non-residential gross floor area* used for offices, administrative offices of a *non-profit institution* of a religious, educational, recreational, fraternal or philanthropic nature, *government offices*, and *business offices* exceeds 0.5 times the area of the *lot*:

- (f) Notwithstanding the provisions of paragraphs (c) and (f) of subsection (12) of Section 4 and of paragraphs (a), (b), (c), (d) and (e) of this subsection, a building or structure erected on a *lot* in a CR district which has a greater *non-residential gross floor area* than that permitted by said paragraphs may be used for any purpose or purposes permitted in the district in which the *lot* is located, provided that:
- (i) the *gross floor area* of the building or structure does not exceed the amount permitted to be erected on the *lot* on the applicable date provided in subparagraph (i) of said paragraph (g) of this subsection;
 - (ii) the building or structure was lawfully erected on the *lot* on the applicable date provided in sub-paragraph (ii) of said paragraph (g);
 - (iii) the *non-residential gross floor area* of the building or structure does not exceed the *non-residential gross floor area* lawfully erected on the *lot* on the applicable date provided in sub-paragraph (ii) of said paragraph (g); and
 - (iv) in the case of any *lot* located in an L4.5 or L8 zone in the Central Core, the aggregate length of the portions of the *frontages* of the *lot* which face *street-related retail and service uses* is not less than the lesser of the aggregate length of such portions on January 31, 1976 or 60 per cent of the aggregate length of the *frontages* of the *lot*; (831-78)
- (g) (i) For the purpose of sub-paragraph (i) of paragraph (f) of this subsection, the applicable dates are as follows:
1. In the case of *lots* located in the *Central Area*, December 15, 1974.
- (ii) For the purposes of subparagraphs (ii), (iii) and (iv) of paragraph (f) of this subsection, the applicable dates are as follows:
1. In the case of *lots* located in the *Central Area*, January 31, 1976.

(3) SETBACKS AND COVERAGE:

- (a) No person shall erect a *residential building* or a *mixed-use building* such that the coverage of the lowest floor in which *dwelling units* or *dwelling rooms* are located exceeds sixty (60) per cent of the area of the *lot* on which such building is located.
- (b) No person shall erect a *residential building* or a *mixed-use building* on a *lot* in a CR district in which the main window of the living area of a *dwelling unit* or *dwelling room* in such building is located any closer than:
 - (i) 15 metres to the main window of the living area of another *dwelling unit* or *dwelling room* located on the same *lot*; or
 - (ii) 11 metres to a window of a *habitable room* of another *dwelling unit* or *dwelling room* located on the same *lot*; or
 - (iii) 7.5 metres to a wall, or to a *lot* line which is not a *street* line or which does not abut a public park;

provided that the living area to which reference is made in this paragraph does not include a room used exclusively for the purposes of a bathroom, bedroom, or kitchen.

SECTION 12A - CR DISTRICTS

(4) RECREATION SPACE:

- (a) No person shall erect or use a *residential building* or a *mixed-use building* on a *lot* in a CR district if the *lot* has lesser *recreation space* than the aggregate of the amounts required for the *dwelling rooms* or *dwelling units* contained in such building by the following table:

<u>Type of Dwelling Room or Dwelling Unit</u>	<u>Recreation Space Requirement</u>
<i>Dwelling room</i>	4.5 square metres per room
<i>Senior citizens housing dwelling unit</i>	9 square metres per unit
<i>Single persons housing dwelling unit</i>	9 square metres per unit
<i>Bachelor dwelling unit</i>	13 square metres per unit
<i>One-bedroom dwelling unit</i>	16 square metres per unit
<i>Two-bedroom dwelling unit</i>	28 square metres per unit
<i>Dwelling unit containing three or more bedrooms</i>	37 square metres per unit

(831-78)

- (b) No person shall erect or use a *residential building* or a *mixed-use building* containing *dwelling units* on a *lot* in a CR district, other than *senior citizens housing* or *single persons housing*, if the portion of the *recreation space* required by paragraph (a) which is provided on the *lot* as *personal recreation space* is less than the amounts required for each *dwelling unit* contained in such building by the following table:

<u>Type of Dwelling Unit</u>	<u>Portion of Total Recreation Space Requirement to be Provided as Personal Recreation Space</u>
<i>Bachelor dwelling unit</i>	4 square metres per unit
<i>One-bedroom dwelling unit</i>	6.5 square metres per unit
<i>Dwelling unit containing two or more bedrooms</i>	9 square metres per unit

(831-78)

- (c) None of the provisions of paragraph (a) shall apply to prevent the use of a building or structure on a *lot* in a CR district in the *Central Area* having a lesser *recreation space* than the amount required by paragraph (a), provided that the building or structure was lawfully erected on January 31, 1976; (831-78)

- (d) For the purpose of this Section:

SECTION 12A - CR DISTRICTS

- (i) "recreation space" means an area or areas within a lot provided exclusively for the use of the residents of a residential building or a mixed-use building located on such lot, for the purpose of personal recreation space or shared recreation space;
- (ii) "personal recreation space" means recreation space within or outside a building located adjacent to and directly accessible from a dwelling unit or dwelling room, which is provided for the exclusive use of the occupants of the dwelling unit or dwelling room, and includes a private patio, courtyard, garden, terrace, balcony or enclosed balcony; (831-78)
- (iii) "shared recreation space" means recreation space provided within or outside a building for the use of the residents of such building for recreational or social purposes, and includes a landscaped area, a garden, a terrace, an outdoor swimming pool, an outdoor games or play area, a tot lot, a covered sitting area, an indoor swimming pool, a sauna, a shower and change room, an exercise room, a hobby room, a workshop, a lounge or a meeting room;
- (iv) "bachelor dwelling unit" means a dwelling unit which contains only one habitable room; (831-78)
- (v) "bedroom" means a habitable room larger than 7 metres, but does not include a living room, dining room or kitchen. (831-78)

(5) COMMON OUTDOOR SPACE:

- (a) No person shall erect or use a non-residential building or a mixed-use building on a lot in a CR district in the Central Core having one or more frontages exceeding 12 metres in length, if the lot has lesser common outdoor space than the amount required by the following table:

<u>Number of frontages of the lot which exceed 12 metres in length</u>	<u>Common Outdoor Space Requirement</u>
One	1.5% of the non-residential gross floor area contained in the building or structure or 4.5% of the area of the lot, whichever is the lesser;
Two	3.0% of the non-residential gross floor area contained in the building or structure or 9.0% of the area of the lot, whichever is the lesser;
Three	4.5% of the non-residential gross floor area contained in the building or structure or 13.5% of the area of the lot, whichever is the lesser;
Four or more	6.0% of the non-residential gross floor area contained in the building or structure or 18% of the area of the lot, whichever is the lesser;

SECTION 12A - CR DISTRICTS

(831-78) (511-79)

- (b) For the purposes of this Section, the term "*common outdoor space*" means any paved, sodded or landscaped area which:
- (i) adjoins, and is directly accessible from, a street, park or other public area, a pedestrian walkway on a *lot*, or a pedestrian walkway within a building on such *lot*, provided that such walkway meets the criteria set out in subparagraph (iii) of paragraph (a) of subsection (2) of this Section; (831-78)
 - (ii) is open to the sky or is covered by a structure or any portion of a building but not located within a building;
 - (iii) is located within 2 metres of a *grade* and is accessible therefrom by means of a stair or ramp; (831-78)
 - (iv) is not narrower than 2.5 metres for an area covered by a structure, and not narrower than 3 metres for any other area;
- and (831-78)
- (v) is not used for the purposes of a driveway, vehicular ramp, loading or servicing area, outdoor storage area, motor vehicle parking area, or stairs or any portion thereof where the treads of such stairs are less than 1.5 metres in width. (831-78)
- (c) None of the provisions of paragraph (a) of this subsection shall apply to prevent the erection or use of a building or structure on a *lot* in a CR district in the *Central Core* having lesser *common outdoor space* than the amount required by paragraph (a), where:
- (i) the *non-residential gross floor area* of the building or structure to be erected on the *lot* is less than 625 square metres;
 - (ii) the *lot* contains a building, the grade level storey of which had a floor area greater than 75 per cent of the area of the *lot* on the day of passing By-law No. 35-76; or
 - (iii) the building or structure was erected prior to the passing of By-law No. 35-76. (35-76) (430-76) (517-76) (683-76) (831-78) (694-79) (836-79) (745-79)

SECTION 12D - I1 DISTRICTS (681-78)

(1) No person shall, within any I1 district, use any *lot* or erect or use any building or structure for any purpose except one or more of the following I1 uses, namely:

(a) **INDUSTRIAL USES:**

(i) **MANUFACTURING AND RELATED ACTIVITIES:**

an artist's or photographer's studio, a blacksmith's shop, a bookbinder's shop, a carpenter's shop, a ceramics factory, a commercial welder's shop, a contractor's shop, class A, a custom workshop, a duplicating shop, a film or recording studio, a fur goods factory, a garment factory, an ink factory - secondary, a laboratory, class A, a leathersgoods factory, a miscellaneous light manufacturing plant, a miscellaneous textile products factory, a paper products factory, a pharmaceutical factory - secondary, a plastic products factory secondary, a prepared horn and bone products factory, a printing plant, a retail outlet ancillary to industry not exceeding a gross floor area of 475 square metres, a sample or showroom, a spotting and stain removing establishment, a taxidermist shop, a tinsmith's shop, a small metal wares factory not exceeding a gross floor area of 475 square metres, an upholster's shop, an industrial computer service;

(ii) packing or packaging any goods, wares or merchandise, substances, articles or things mentioned in clause (i);

(iii) **WAREHOUSE, STORAGE, UTILITIES, ETC.:**

a cold storage plant, a parking lot, a parking station, a private garage, a storage warehouse, class A, a wholesaling establishment - general;

(iv) any use which is *accessory* to any of the foregoing uses; (100-79)

(b) **COMMERCIAL AND INSTITUTIONAL USES INCIDENTAL TO INDUSTRIAL USES OR AREA:**

(i) *a barber's or hairdresser's shop, a dressmaker's shop, a dry cleaning shop, a locksmith's or gunsmith's shop, a newsstand, a branch of a bank or financial institution, a post office, a service and repair shop, a tailor's shop, provided such uses are located at, partly above or partly below, grade;*

(ii) *a clinic, a craft school, a day nursery, a nursery school, a public park not including a stadium or arena, a union hall;*

(iii) any use *accessory* to any of the foregoing uses;

(c) **SIGNS:**

(i) *a wall sign, a window sign, an identification sign, a projecting sign, a ground sign, a banner sign, a marquee or canopy sign;*

(ii) any sign, whether *accessory* or not, shall conform to existing *height* limits;

SECTION 12D - II DISTRICTS (681-78)

- (iii) no such sign, if illuminated, is illuminated by a flashing or intermittent-type of illumination; and
 - (iv) the illumination of any such sign is so arranged that the light therefrom is not directed toward any other building or *lot* (681-78) (150-80)
- (2) No person shall, on any *lot* in any II district, erect or use any I building or structure including any *accessory* loading area which is not *wholly* enclosed.
- No person shall, on any *lot* in any II district, use or maintain any *open storage* area, except for any *accessory* parking as may be permitted by this By-law in such districts.
- (3) No person shall, on any *lot* in any II district, erect or use any building or structure closer to the *front lot line* than half the shortest distance between the main front wall of a *residential building* adjoining the *lot* and the *front lot line* of the *lot* upon which the *residential building* is erected and, in the case of a building or structure between two *residential buildings* or structures the average of the shortest distance between the main front walls of such buildings and their *front lot lines*, and such front yard area shall either be maintained as *landscaped open space* or shall have a properly drained hard surface. (681-78)

SECTION 12E - I2 DISTRICTS

- (1) No person shall, within any I2 district, use any *lot* or erect or use any building or structure for any purpose except any I1 use or one or more of the following I2 uses, namely:

(a) INDUSTRIAL USES:

(i) MANUFACTURING AND RELATED ACTIVITIES:

an automobile service and repair shop, a bakery, a bread distributing depot, a builders' supply yard, a candy factory, a carpet cleaning establishment, a contractor's shop, class B, a courier service, a data processing establishment, a dry cleaner's distributing station, a dry cleaning establishment, an industrial catering service, a machine laundry, a mattress and mattress spring factory, a non-dangerous, non-offensive metal products factory, a miscellaneous vegetable food products factory, class A, a motor vehicle repair shop, class A, a newspaper plant, a photographic plant, a plastic products factory, a salvage shop, a security service and equipment business, a small metal wares factory, a soft drink bottling works, a textile factory, a wholesale dyeing plant, a wood products factory, a workshop or equipment yard of a decorator, interior decorator, display designer, or sign erector; (681-78) (150-80)

- (ii) packing or packaging any goods, wares or merchandise, substances, articles or things mentioned in clause (i);

(iii) WAREHOUSE, STORAGE, UTILITIES, ETC.:

an armoury or drill hall, a city yard, class A, a food wholesaling establishment, a food warehouse, an open storage yard, a postal sorting station, a private commercial garage, a public or private commercial scales, a pumping station, railway tracts, a railway station, a sales or hire garage, a waterworks;

- (iv) any use *accessory* to any of the foregoing uses; (100-79)

(b) COMMERCIAL AND INSTITUTIONAL USES INCIDENTAL TO INDUSTRIAL USES OR AREA:

- (i) *an automobile service station, a barber's or hairdresser's shop, a car washing establishment, a dressmaker's shop, a dry cleaning shop, a fire hall, a locksmith's or gunsmith's shop, a newsstand, a branch of a bank or financial institution, a police station, a post office, a service and repair shop, a tailor's shop, an eating establishment not exceeding a gross floor area of 475 square metres, a tavern or public house not exceeding a gross floor area of 475 square metres, a trade school, a taxicab stand or station;*

- (ii) any use that is *accessory* to any of the foregoing uses. (681-78)

(c) SIGNS:

- (i) roof signs providing their area is not greater than 23 square metres;

SECTION 12E - 12 DISTRICTS

- (ii) any sign, whether *accessory* or not, shall conform to existing *height* limits;
- (iii) no such sign, if illuminated, is illuminated by a flashing or intermittent type of illumination;
- (iv) the illumination of any such sign is so arranged that the light therefrom is not directed toward any other building or *lot*. (150-80)

SECTION 12F - I3 DISTRICTS

- (1) No person shall, within any I3 district, use any *lot* or erect or use any building or structure for any purpose except any I1 use, any I2 use or one or more of the following I3 uses, namely:

(a) **INDUSTRIAL USES:**

(i) **MANUFACTURING AND RELATED ACTIVITIES:**

an animal food factory, a brewery, a canning factory (fruits and vegetables), a dairy products plant, a distillery, a fishpacking plant, a gelatine factory, an ink factory - primary, an inoffensive gas plant, a meat products plant, a metal products factory, a miscellaneous vegetable food products factory, class B, a motor vehicle repair shop, class B, a pharmaceutical factory primary, a vegetable oils plant, a winery;

- (ii) packing or packaging any goods, wares or merchandise, substances, articles or things mentioned in clause (i);

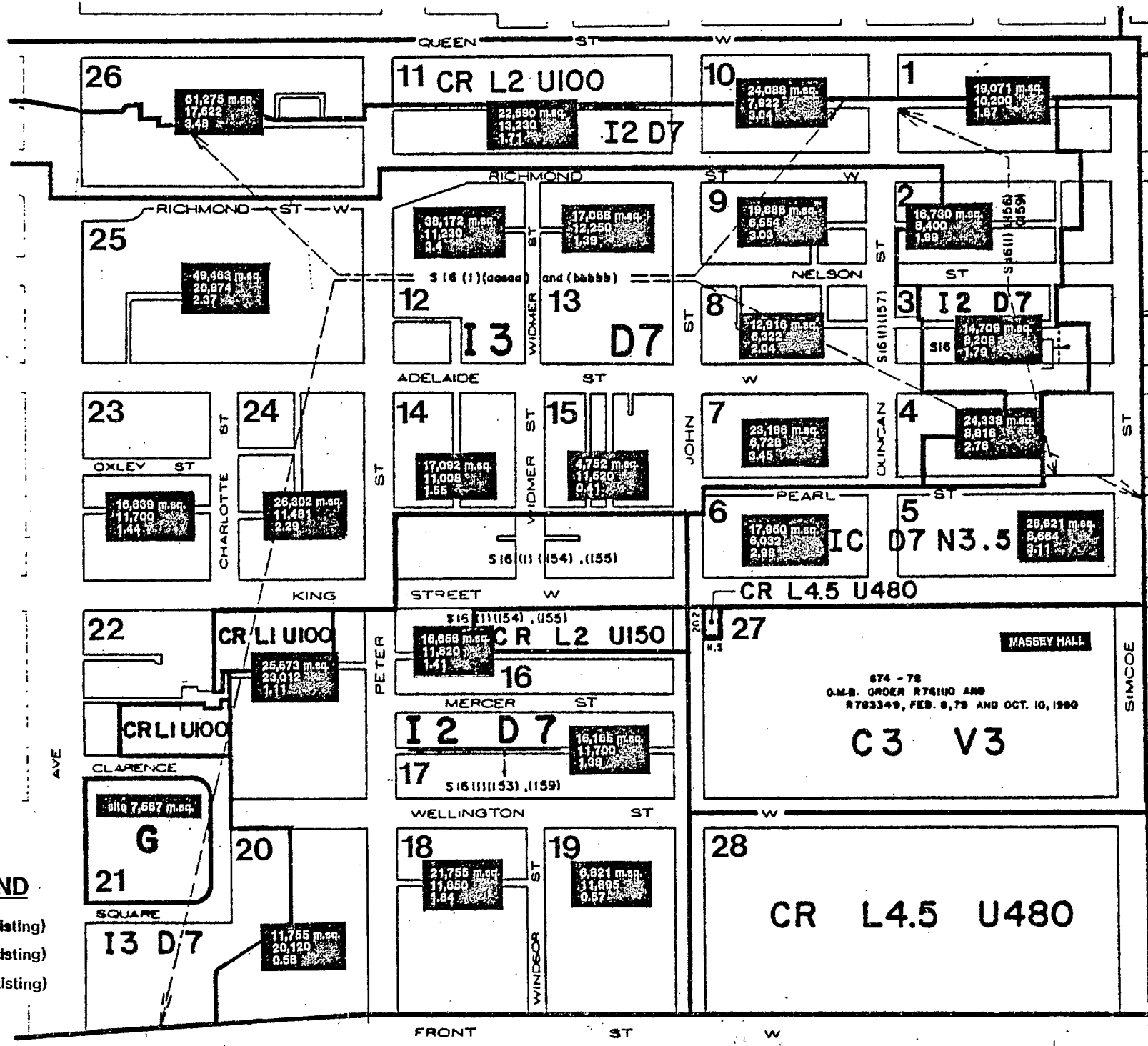
(iii) **WAREHOUSE, STORAGE, UTILITIES, ETC.:**

a bus station, a cartage, express or truck transport yard or terminal, a commercial stable, a contractor's yard, a public harbour works, including public wharves, lighthouses and beacons, a railway service and repair yard, a retail coal, coke and wood yard;

- (iv) any use which is *accessory* to any of the foregoing uses. (100-79) (150-80)

(b) **SIGNS:**

a wall sign, a window sign, an identification sign, a projecting sign, a ground sign, a banner sign, a marquee or canopy sign, a roof sign or other advertising device. (150-80)



Zoning Designations Governing the Communications District

Appendix Nine

