

NRTEE +15

National Brownfield Survey Results

Prepared for: Canadian Brownfields Network
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Research Objectives: NRTEE +15 Year

How has brownfields changed in last 15 years?

Objectives:

1. How have we measured up against the NRTEE National Brownfield Strategy & Recommendations?
2. What is the state of practice in Canada?
3. What is the perception of the state of practice?



Survey Methodology

Staged Collaborated Survey Design with CBN Board Members.

- Live from March 15 to May 11
- 264 participants contacted
- 25 organizations contacted
- Online Survey
- Snowball Sampling
- Open-Ended, Closed-Ended, Grading, and Likert Questions

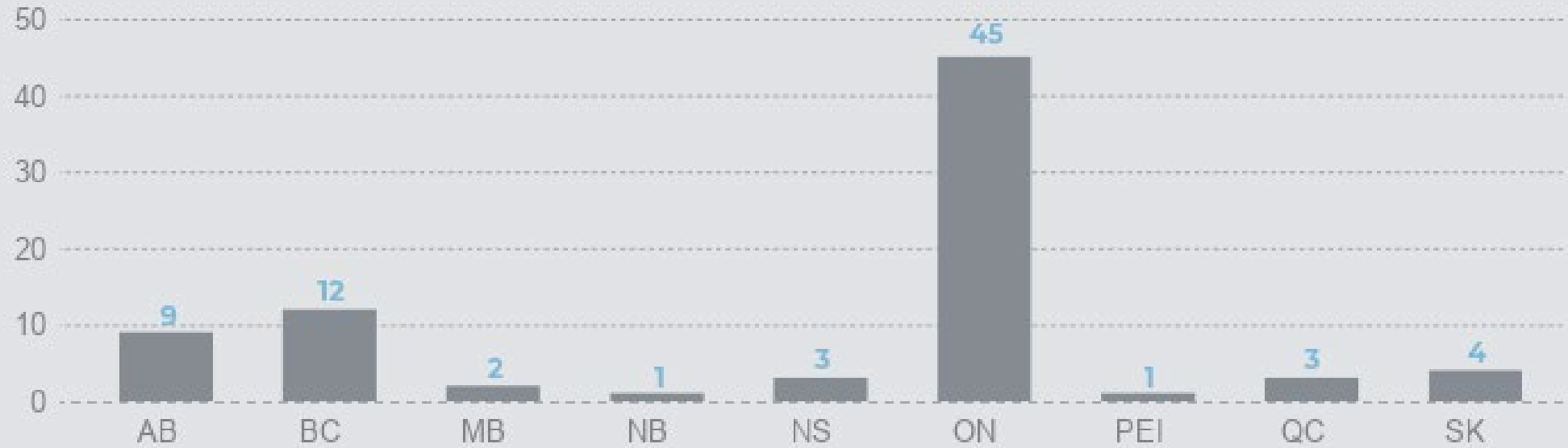
Organizations Represented by Respondents



80 survey participants
Combined experience on **6,454** projects

Geography of Respondents

Provinces



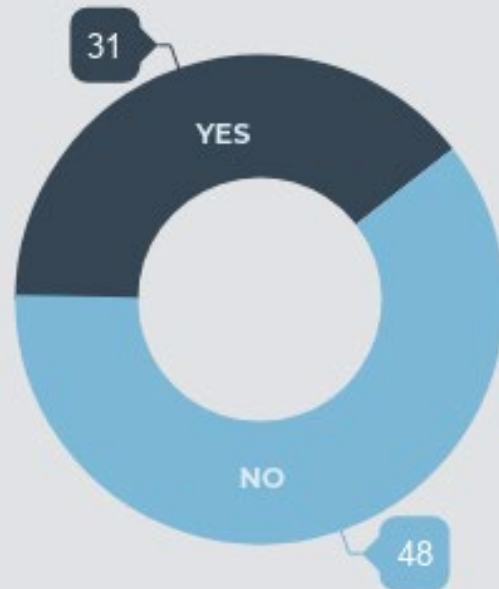
Geography of Respondents

Geographic Scope

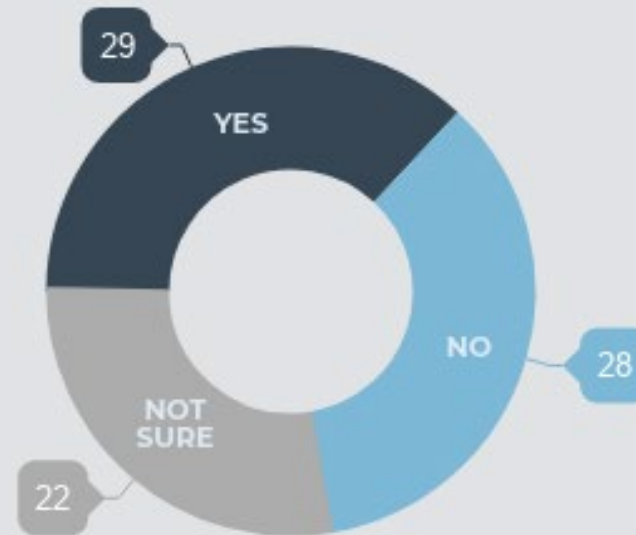


Brownfield Organizations & Partnerships

Member of Brownfield
Non-Profit Organization

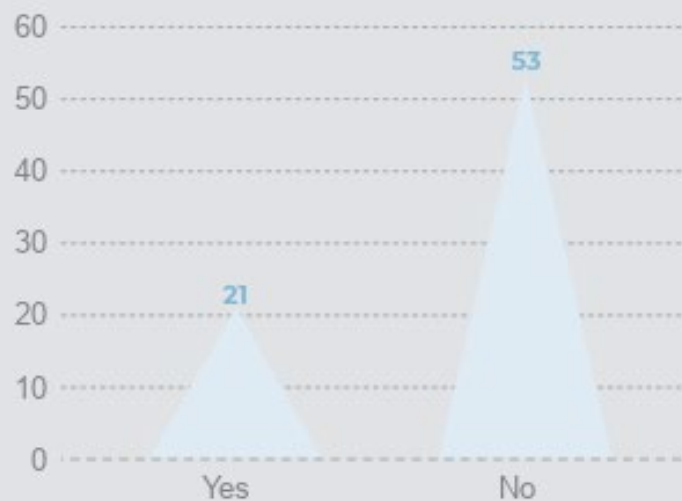


Local Multi-Level Government or
Partnerships to Aid Brownfield

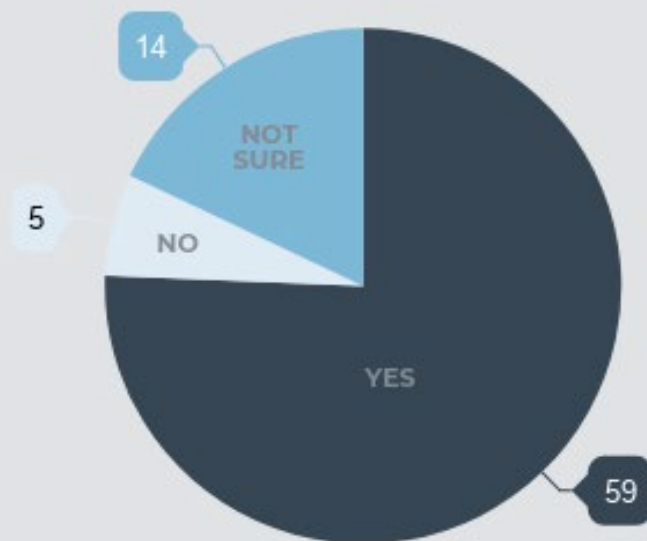


- SuRF Canada, CBN, FCM, Atlantic PIRI
- Hamilton Chamber of Commerce, Brantford BF Advisory Committee
- Provincial Industrial Associations: ONEIA, BCEIA, NBEA, ESSA

Existing Mechanism in Place for Collecting Revenue for Brownfield?



Would Canada Benefit from a National Fund?



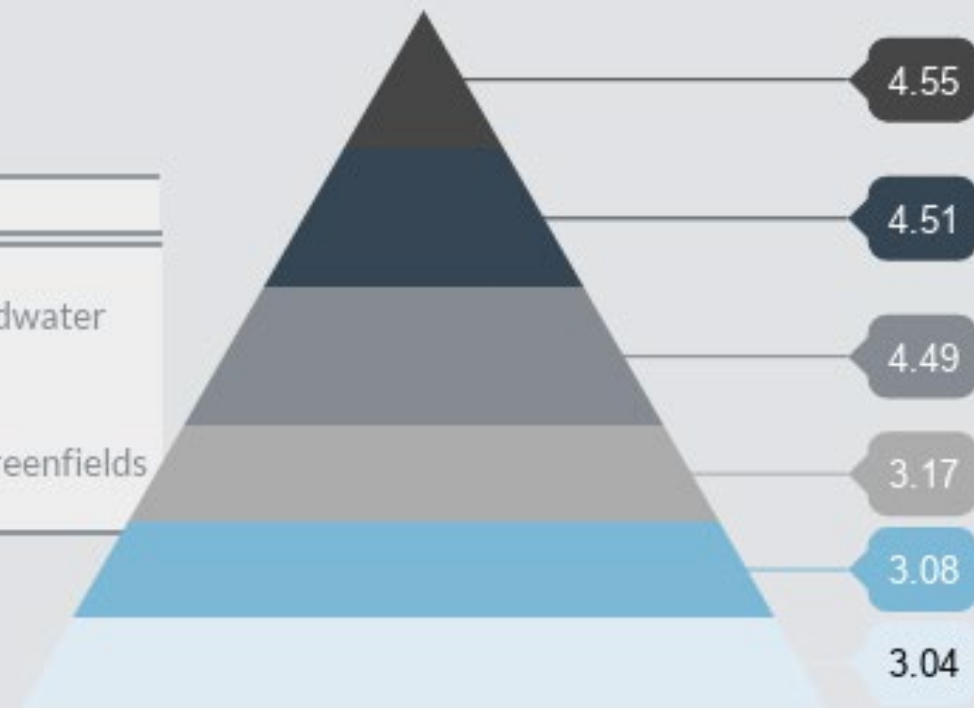
- Land Transfer Tax (Ontario & BC)
- Fuel Tax (BC)
- Climatsol (Quebec)
- Community Improvement Plans (Ontario)
- Toronto Brownfield Remediation Tax Assistance (BRTA)
- Brownfield Financial Tax Incentive Program (BFTIP)

Brownfield Motivators

Degree in which each motivator affects a participants' involvement in brownfield.

Grading Scheme: Highly Unimportant, Not Important, Neutral, Somewhat Important, Very Important, Not Applicable/No Answer

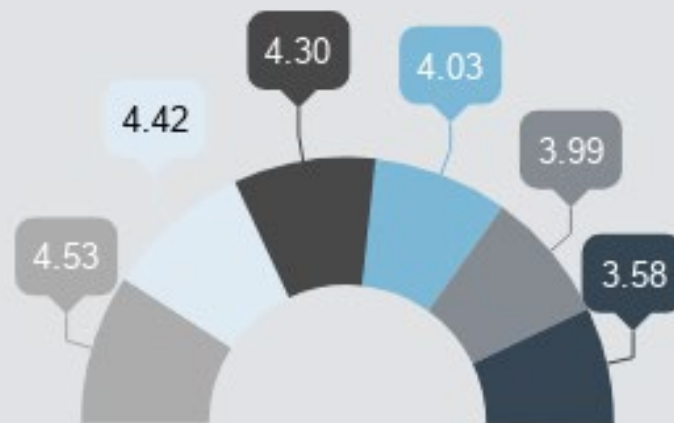
Rank	Motivator
1	To Protect Public Health & Safety
2	Reduce Contamination & Protect Soil & Groundwater
3	Conform with Environmental Regulations
21	Provincial/Federal Ownership of a Site
22	Avoid High Development Charges Levied on Greenfields
23	To Promote Canadian Cleanup Technology



Brownfield Barriers

Degree in which each **governance** barrier affects a participants' involvement in brownfield.

Grading Scheme: Highly Unimportant, Not Important, Neutral, Somewhat Important, Very Important, Not Applicable/No Answer



Rank	Barrier
1	Slow Timelines for Ministry Responses to BF Submissions
2	Lack of Political Will & Awareness of BF Issues
3	Lack of Regulatory Liability Closure Mechanism
11	Limited Federal Budget to Address Brownfield
12	Inter-Jurisdictional Complications
13	Lack of Site Inventories

Brownfield Barriers

Degree in which each **development** barrier affects a participants' involvement in brownfield.

Grading Scheme: Highly Unimportant, Not Important, Neutral, Somewhat Important, Very Important, Not Applicable/No Answer



Rank	Barrier
1	"Upside Down" Remediation Costs
2	High Remediation Costs
3	More Contamination than Expected/Surprise Costs
28	Lack of Information on the History of Sites
29	Property Ownership Issues
30	Competitive Bidding Process

NRTEE Recommendations Score Card

A grade for how well the recommendations put forward in the National Brownfield Redevelopment Strategy for Canada have been achieved.

Grading Scheme: A = Excellent, B = Good, C = Satisfactory, D = Marginal, F = Unsatisfactory/No Action Taken

NRTEE Recommendations & Actions		Federal	Provincial	Municipal
Applying Strategic Public Investments to Address Upfront Costs	Implement Tax System Changes to Promote Brownfield Redevelopment	F	D	D+
	Remove Liens & Tax Arrears Against Qualifying Brownfield Sites	F	D	D
	Provide Mortgage Guarantees for Qualifying Brownfield Sites	F		
	Provide Revolving Loans for Qualifying Brownfield Sites	D	F	D-
	Provide Grants for Qualifying Brownfield Sites	D	D-	D+

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NRTEE Recommendations & Actions		Federal	Provincial	Municipal
Establishing an Effective Public Policy Regime for Environmental Liability and Risk Management	Allow Binding Contractual Allocation to Liability		D	
	Provide for Termination of Regulatory Liability		D+	
	Provide for Termination of Civil Liability After a Limitation Period	F	F	
	Create an Insurance Fund for Post-Liability Termination Claims	F	F	
	Apply Site Specific Assessments & Approvals Regime	D	C+	D+
	Provide for Regulatory Approvals for Remediation		C+	D+

NRTEE Recommendations Score Card

A grade for how well the recommendations put forward in the National Brownfield Redevelopment Strategy for Canada have been achieved.

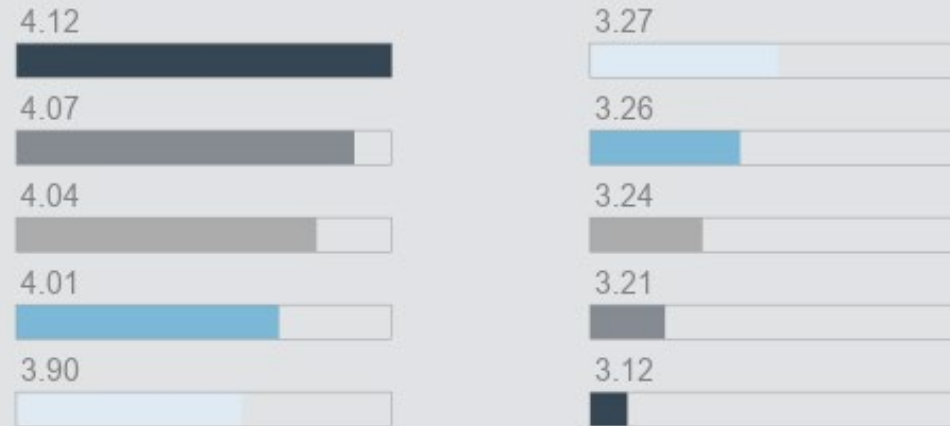
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NRTEE Recommendations & Actions		Federal	Provincial	Municipal
Building Capacity for and Community Awareness of Brownfield Redevelopment	Increase Capacity to Undertake Brownfield Redevelopment Projects	D-	D	D+
	Facilitate the Demonstration of Innovation & Remediation	D	D	D-
	Raise Awareness of the Benefits of Brownfield Redevelopment	D	D+	

NRTEE Suggested Policy Tools

Each tool listed in the National Brownfield Redevelopment Strategy for Canada rated by degree of implementation over the last 15 years.

Grading Scheme: Significantly Worse, Somewhat Worse, No Change, Some Improvement, Significant Improvement, No Answer



Rank	NRTEE Toolkit
1	Regulated Risk Assessment Standards & Risk Management
2	Regulated Site Investigation Standards
3	Internet Sites & Conferences Dedicated to Brownfield Redevelopment
4	Contaminated Sites Policies, Legislation & Regulations
5	Private Sector Advertising of Service Related to Brownfield
39	Flexible Zoning Requirements
40	Tax Arrears Cancellations
41	Insurance Programs for Cost-Capping & Civil Liability Protection
42	Power-of-Entry Rights to Perform Environmental Site Assessments
43	Provincial Contaminated Sites Grant Program

Sector Recommendations

The top actions or tools that need to be implemented or strengthened by each sector in order to advance brownfield redevelopment.

Development Sector

1. Work in partnership with local governments to find solutions.
 - ✓ Educate,
 - ✓ lobby,
 - ✓ share lessons learned.
2. Apply pressure on local governments.
Make brownfields a priority.
3. Support each other.
Experienced developers mentoring smaller property owners.
4. Be a source for an inventory. Get creative with brownfields.

Environmental Sector

1. Encourage and become comfortable with risk assessment.
Lobby for new technology.
Be involved with communication.
Ensure clarity on regulatory requirements for risk management.
2. Better education and training for appropriate Qualified Persons skill sets.
3. Better understanding of brownfields; opportunities & benefits.

Legal Sector

1. Charge less.
Be more open for consultation.
Collaborate with the community more.
2. Create guidance documents that outline the barriers to liability closures.
3. Create other guidance documents of regulatory process and applicable laws.

Finance & Insurance

1. "Educate, educate, educate."
Understand perceived risk vs. actual risk and how risk management is important and should be welcomed.
2. Understand the overall inherent value of brownfields; not just the new building, but the greater societal benefit.

Federation of Canadian Municipalities

1. Lobby for and allocate more government funding.
2. Increase flexibility of application forms.
Increase diversity of projects that qualify for grants.
3. Continue spreading the message:
"Brownfields are of value!"
4. Continue with the education of municipalities, general public, and governments about technical guidance, training, and the value of brownfields.

Academia

1. Conduct studies within a reasonable time frame.
2. Study Best Management Practices, Lessons Learned, and case studies.
3. Researchers collaborate with organizations, companies, and municipalities.
4. "Understand there is a significant difference between Theory and Real Life"

Canadian Brownfields Network

1. Improve outreach through webinars, conferences, and more local events.
2. Partner with ECO Canada, municipal governments, and other associations.