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**Infrastructure
Ontario**

April 8, 2021

IO April 2021 Market Update

I am pleased to present IO's first Market Update for 2021. This quarter's listing of 41 projects in pre-procurement and procurement (totalling an estimated \$60 billion in contract value) confirms the continuation of Ontario's historic commitment in modernizing the province's public assets, including highways, public transit, hospitals, children's treatment centres, courthouses and correctional facilities. The list also includes 12 additional government-announced projects in early stages of planning and determining the project's scope, timing and delivery model.

Health and Long-Term Care

Late last year we marked the completion of our 50th P3 Health project. We are well along in the work for our next 50 as we support hospitals and the Ministry of Health in the continued modernization of our province's health care system. As announced in the recent Ontario Budget, we are proud to partner with Trillium Health Partners in their ambitious capital redevelopment program. Our long and successful partnership with Trillium includes several capital projects, the ongoing rapid construction of two long-term care facilities, and additional advisory support. We are also pleased to confirm the addition of the Children's Hospital of Eastern Ontario (CHEO) project—previously in the planning category—to pre-procurement as a Design-Build-Finance. The CHEO 1door4care redevelopment project will bring seven locations under one roof, improving access and care for kids and youth with special needs, medical complexity or facing mental health challenges, and their families.

IO is also supporting the Ministry of Long-Term Care by leading its Long-Term Care Land Disposition Program. This program is offering surplus government lands that have been identified for disposition for the specific purpose of addressing capacity issues and delivering long-term care.

Transit

The April 2021 Market Update demonstrates continued progress on the significant work underway with our Metrolinx partners. We are excited to confirm that two of the three Ontario Line contracts, and two of three subway extensions projects, are scheduled to be in market next quarter. Early work has already begun toward advance tunneling projects on both the Scarborough Subway Extension and the Eglinton Crosstown West Extension as we expect to finalize advance tunneling contracts later this spring.

We and our partners at Metrolinx continue to finalize the contract models for the balance of the subways program. Our ability to continuously adapt to the project needs and market feedback have resulted in an incredibly competitive set of international bidders for those projects we have already procured. We continue to consider and adapt in our work as we seek the best approach to procure each of our contracts.

Transportation

The Garden City Skyway is identified in the planning section of our Update along with those already progressing toward RFQs this year (Highways 3 and 17). We look forward to providing more detail for future highway projects ultimately confirmed by Government to be P3s delivered by IO.

Justice

The early success of rapid construction on long-term care homes in Mississauga, Toronto and Whitby has led to adopting the program for the Thunder Bay Correctional Centre and Kenora Jail. We anticipate further use of this rapid delivery approach for additional projects as the Province continues to identify urgent capital needs and opportunities to use proven, faster delivery methods.

Transforming the Way We Manage Government's Real Estate Assets

Working on behalf of the Government of Ontario, IO manages one of Canada's largest and most diverse real estate portfolios in Canada. It includes nearly 4,500 buildings and other structures, more than 15 million square feet in rentable office space and one million acres of land spanning the province. We are currently working with our contracted partners to manage, transact leases and maintain those assets through property and land management contracts that are set to expire next year.

IO is working toward transformational partnerships with industry partners to manage, maintain, transact and enhance that portfolio through multi-year commitments. We look forward to speaking to various potential partners about the shape of the intended transformation this summer – and expect competitive procurements for support to commence this year. We look forward to sharing more details in future Market Updates.

Broadband

Our vision at IO is to be a world class agency creating a connected, modern and competitive Ontario. That is why we are proud to be supporting the government's significant commitment to expand broadband access to unserved and underserved areas across the province. The government of Ontario's investment is an opportunity for innovative partnerships with industry to provide high-speed broadband infrastructure throughout Ontario quickly, and cost effectively, by 2025. We look forward to sharing more details on how we hope to support the Ministry of Infrastructure in fulfilling this transformative Government commitment.

Continuous Improvement – Our Work and Our Market Updates

The Update we are presenting today marks a significant step forward as we broaden the type of planning information we share with industry. As the market changes and government project needs evolve, so must we. We have been listening closely to the ideas and concerns of our industry partners and will continue to do so at all levels of our organization.

Adding PDC and TA Details to the Update: A new addition to our Market Update is detail regarding projects that include planning, design and compliance (PDC) and technical advisory (TA) contracts. These pre-project contracts enable us to plan for the most effective and cost-competitive projects on behalf of the Government and taxpayers. We have heard from the market is that it's helpful to know which IO projects include contracts for a technical advisor and for planning, design and compliance advisory services. Those details are confirmed in a column in our pre-procurement chart.

Likewise, we anticipate initiatives such our transformative real estate outsourcing contract to be further detailed in the future Updates.

I would also like to formally welcome Angela Clayton back to Infrastructure Ontario as our new President of Project Delivery. I am extremely pleased that Angela agreed to rejoin IO's team and take on what I know personally to be an incredibly rewarding and challenging responsibility in leading the program that delivers on most projects you see in this quarter's update.

The April 2021 Market Update and the additional initiatives listed above reflect our constant pursuit of improving upon everything we do. Being sharp, skilful and solutions-oriented is in our DNA as a public agency. We constantly seek to earn the public's trust. We look forward to forming many new partnerships to complete this exciting body of work with those who share our values and continuous journey of improvement.

Thank You,

Michael Lindsay
President and CEO
Infrastructure Ontario

Projects in Pre-Procurement

Project	Model	PDC/TA Procurement	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Total Capital Costs
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TRANSIT

*/**Scarborough Subway Extension – Stations, Railway, Systems	TBD	Awarded	Spring/Summer 2021	Fall 2021	Spring 2023	Toronto	\$2B-\$4B
**Yonge North Subway Extension	TBD	Awarded	Fall 2021	Spring 2022	Fall 2023	Toronto/York Region	> \$5B
*Ontario Line – Northern Civil, Stations and Tunnel	DBF	Awarded	Spring 2022	Fall 2022	Spring 2024	Toronto	> \$3B
*/**Eglinton Crosstown West Extension - Stations, Railway, Systems	TBD	Awarded	TBD	TBD	TBD	Toronto	\$2B-\$4B

*Please also refer to the “Projects in Active Procurement” table below for an overview of the contract packages for the Ontario Line, Scarborough Subway Extension and Eglinton West LRT Extension that are currently in-market.

**YNSE/SSE/ECWE: IO/Metrolinx are continuing to determine specific optimal contract packaging strategies.

TRANSPORTATION

Highway 3	DBF	In Market	May 2021	October 2021	Summer 2022	Town of Essex to Leamington	< \$200M
Highway 17	DBF	Spring 2021	Summer/Fall 2021	Winter/Spring 2022	Winter 2023	Am prior to Renfrew	\$200M - \$499M

JUSTICE

Quinte Detention Centre	BF	Spring 2021	Summer 2022	Summer 2023	2024	Napanee	< \$200M
Eastern Ontario Correctional Complex	DBFM	Awarded	Summer 2022	Summer 2023	2024	Kemptville	\$200M - \$499M
Brockville Correctional Complex/ St. Lawrence Valley Correctional and Treatment Centre	DBF	Spring 2021	Summer 2022	Spring 2023	2024	Elizabethtown-Kitley	\$200M - \$499M

Project	Model	PDC/TA Procurement	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Total Capital Costs
*HEALTH CARE							
Kingston Health Sciences Centre - Kingston General Hospital Redevelopment	DBF	Awarded	Fall 2021	Winter 2022	2022	Kingston	\$500M - \$1B
Trillium Health Partners Broader Redevelopment – Queensway Health Centre	BF	Awarded	Fall 2021	Summer 2022	2023	Toronto	\$500M - \$1B
Centre for Addiction and Mental Health – Phase 1D Redevelopment	DBF	Awarded	Fall 2021	Spring 2022	2023	Toronto	\$500M - \$1B
Quinte Health Care– Prince Edward County Memorial Hospital Redevelopment	BF	N/A	Spring 2022	Fall 2022	2023	Picton	< \$200M
Weeneebayko Area Health Authority – Health Campus	DBF	RFP Closed	Summer 2022	Winter 2023	2024	Moosonee/ Moose Factory	\$200M - \$499M
The Ottawa Hospital – New Civic Redevelopment	DBFM	Summer 2021	Fall 2022	Spring 2023	2024	Ottawa	> \$2B
Trillium Health Partners Broader Redevelopment – Mississauga Hospital Site	DBFM	Awarded	Winter 2022	Fall 2022	2023	Mississauga	> \$2B
Lakeridge Health – Bowmanville Hospital Redevelopment	DBF	Winter 2022	Winter 2023	Summer 2023	2024	Bowmanville	\$500M - \$1B
North York General Hospital – Inpatient Redevelopment	DBF	Winter 2022	Spring 2023	Fall 2023	2024	Toronto	\$500M - \$1B
Collingwood General and Marine – Hospital Redevelopment	BF	N/A	Spring 2023	Fall 2023	2024	Collingwood	\$200M - \$499M
Hamilton Health Sciences – Juravinski Hospital Redevelopment	DBF	2022	Fall 2023	Spring 2024	2025	Hamilton	> \$1B
William Osler Health System – New Peel Memorial Inpatient Hospital	DBF	Summer 2021	Fall 2022	Spring 2023	2023	Brampton	\$500M - \$1B
Windsor Regional Hospital – New Windsor Essex Acute Care Hospital	DBFM	TBD	> 5 years	> 5 years	> 5 years	Windsor	> \$1B
The Hospital for Sick Children – Project Horizon	DBFM	TBD	> 5 years	> 5 years	> 5 years	Toronto	> \$2B
Lakeridge Health – Broader Redevelopment	TBD	TBD	> 5 years	> 5 years	> 5 years	TBD	TBD
Scarborough Health Network Broader Redevelopment	TBD	TBD	> 5 years	> 5 years	> 5 years	Toronto	TBD
Hotel-Dieu Grace Healthcare – Mental Health Inpatient Bed Expansion	TBD	TBD	> 5 years	> 5 years	> 5 years	Windsor	< \$200M

*The Ministry of Health continues to review timing and cost details of each project in light of the Province's ongoing COVID-19 response and recovery work.

Project	Model	PDC/TA Procurement	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Total Capital Costs
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CHILDREN'S TREATMENT CENTRES

CHEO Integrated Treatment Centre – 1Door4Care	TBD	TBD	TBD	TBD	TBD	Ottawa	\$200M - \$499M
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Projects in Active Procurement

Project	Model	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Total Capital Costs
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TRANSIT

GO Expansion: Lakeshore East – Central Corridor	BF	August 2017	April 2018	Fall 2021	Toronto	\$100M - \$200M
GO Expansion: Milton GO Station	DBF	November 2017	April 2018	Summer 2021	Milton/ Mississauga	< \$100M
GO Expansion: Lakeshore West Corridor	DBF	December 2017	April 2018	Summer/Fall 2021	Halton Region/Toronto	\$200M - \$500M
GO Expansion: OnCorr	DBOM	March 2018	May 2019	2022	Greater Toronto and Hamilton Area	> \$10B
GO Expansion: Union Station Enhancement Project	Alliance	October 2019	February 2020	Fall 2021	Toronto	\$500M - \$1B
Advance Tunnel for Scarborough Subway Extension	DBF	March 2020	August 2020	May 2021	Toronto	> \$1B
Advance Tunnel for Eglinton Crosstown West Extension	DBF	March 2020	August 2020	May 2021	Toronto	> \$1B
Ontario Line – Rolling Stock, Systems, Operations and Maintenance	DBFOM	June 2020	December 2020	Fall 2022	Toronto	> \$2B
Ontario Line – Southern Civil, Stations and Tunnel	DBF	June 2020	December 2020	Fall 2022	Toronto	> \$4B

JUSTICE

Thunder Bay Correctional Complex	DBFM	July 2018	March 2021	2022	Thunder Bay	\$500M - \$1B
Brampton Courthouse Addition Phase 2 & Toronto Region Bail Centre	DBF	January 2020	August 2020	Spring 2021	Brampton/ Toronto	< \$200M

Project	Model	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Total Capital Costs
HEALTH CARE						
Hamilton Health Sciences – West Lincoln Memorial Hospital	DBF	November 2020	Summer 2021	2022	Grimsby	\$200M - \$499M
Niagara Health - New South Niagara Hospital Project	DBFM	February 2021	Fall 2021	2022	Niagara	> \$1B
CHILDREN'S TREATMENT CENTRES						
Grandview Children's Treatment Centre	DBF	September 2020	May 2021	Spring 2022	Ajax	< \$200M

Projects in Planning

The government has also announced several projects that are early in the planning process. Details including delivery model, timing and scope are still being determined.

Transit

- Line 4 Extension (Sheppard East) Subway

Transportation

- Garden City Skyway

Children's Treatment Centres

- Children's Treatment Centre of Chatham-Kent

Health Care

- Lake of the Woods District Hospital (Kenora) – Redevelopment Project
- Muskoka Algonquin Healthcare (Bracebridge and Huntsville) – Hospital Redevelopment Projects
- Stevenson Memorial Hospital (Alliston) – Redevelopment Project
- Hotel Dieu Shaver (St Catharines)
- Markham Stouffville Hospital – Uxbridge Site Redevelopment
- Unity Health Toronto - St Joseph's Health Centre Redevelopment
- London Health Sciences Centre – Stem Cell Transplant Expansion
- South Bruce Grey Health Centre – Kincardine Site Phase 1 Redevelopment Project

Public Works

- Grosvenor Office Tower

Glossary

Red boxed content represents new projects

Blue bordered represents updated procurement information and/or information estimated capital costs

Green boxed content represents projects which have moved into new phases

BF – Build Finance

DBF – Design Build Finance

DBFM – Design Build Finance Maintain

DBFOM – Design Build Finance Operate Maintain

DBOM – Design Build Operate Maintain

RFQ – Request for Qualifications

RFP – Request for Proposals

PDC – Planning and Design Consultant

TA – Technical Advisor

TBD - To be Determined