

# City of Toronto

Feasibility study in respect of  
hosting the 2025 World Expo

11 November 2013



Building a better  
working world

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# Terms of reference

## Introduction and scope

At its meeting of June 6, 2012 City Council (“**Council**”) directed the City Manager and the General Manager, Economic Development and Culture to obtain input from the provincial and federal governments and key relevant agencies and boards and submit two separate reports to the Economic Development Committee in 2013 on the pros and cons of preparing a bid to host World Expo 2025 (“**Expo**”) and/or the 2024 Olympic Games (the “**Games**”) in Toronto.

Two reports were requested by Council and this draft report (the “**Expo Report**”) summarizes our findings in respect of the work done to examine the feasibility of hosting the Expo.

In undertaking the Study, EY partnered with Dr. Stephen Tanny, an independent economics consultant. Dr. Tanny assisted in the modeling and estimation of the potential economic impacts associated with hosting the Expo. In addition, we worked with Steven Staples, a world expo expert, and our EY Global Resources who are part of EY’s Mega Event Team, a group whose primary focus is assisting clients to plan events such as Olympic Games, World Expos and FIFA World Cups.

Our work included preparing order of magnitude estimates of a number of items associated with hosting an Expo. Such items include, but are not limited to, the following:

- ▶ A summary of the procedures for selecting host cities for the World Expo by the Bureau of International des Expositions (the “**BIE**”);
- ▶ A summary of the competitive position of Toronto compared to other cities that may be considering bidding on the Expo including the informal practice of “continental rotation”;
- ▶ The impact of past Council decisions and their bearing on any future Expo bid;
- ▶ The approximate amount of revenue the City may be able to receive as a result of a number of factors (property tax increases, rental income, equity returns, etc.);
- ▶ The number of jobs, in various categories, that may be created as a result of hosting the Expo;
- ▶ Identifying City lands that may be useful in hosting the Expo;
- ▶ Identifying potential legacy items as a result of hosting the Expo;
- ▶ The impact hosting the Expo may have on a number of factors (attracting trade and investment, transit and transportation, etc.);

- ▶ Identifying issues related to land use and planning if they City were to host the Expo; and
- ▶ An estimate of time and funds required to prepare a bid document.

The procedures set out in the Scope of Work (included as Appendix “A”) are limited to data and information gathering and analysis. The Scope of Work does not include: (i) recommendations regarding whether the City should consider hosting the Expo; or (ii) detailed analysis of the costs and potential revenues. We were asked to provide order of magnitude estimates only and further analysis is strongly recommended.

As required by the statement of work, we have prepared an estimate of the time and cost for further due diligence in the “Next Steps” section of this Expo Report.

## Limitations

In preparing this Expo Report, EY relied upon unaudited statistical, operational and financial data and information from a variety of sources as well as discussions and consultations with the City and numerous other stakeholders (collectively, the “**Supporting Information**”). The Supporting Information is detailed in Appendix “B”. Our work in completing the Expo Report was based solely on the Supporting Information available to us as between August 14, 2013 and the date of this Expo Report. EY reserves the right to revise any analyses, observations or comments referred to in this Expo Report if additional Supporting Information becomes subsequently available to us.

EY assumed the Supporting Information to be accurate, complete and appropriate for purposes of the Study. EY did not audit or independently verify the accuracy or completeness of the Supporting Information and, accordingly, EY expresses no opinion or other form of assurance regarding the Supporting Information. An examination or review of framework forecasts and projections on the supporting information, as outlined in the Canadian Institute of Chartered accountant Handbook, has not been performed.

EY also notes that the statement of work issued by the City limited our ability to perform new research. As such, no new, primary research was conducted as part of the Study.

## Use of this Expo Report

This Expo Report is intended solely for the information and use of the City in accordance with the terms of the engagement agreement dated August 14, 2013. This Expo Report is not intended for general circulation or publication, nor is it to be reproduced, referred to or used for any purpose, in whole or in part, without our prior written consent. EY will not assume any responsibility or liability for losses incurred by any party as a result of the unauthorized circulation, publication, reproduction or use of any of this Expo Report, or

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# Executive summary

## Background

The organization founded to regulate Expos, or world's fairs, is generally known by its acronym "BIE", which stands for Bureau International des Expositions. The BIE regulates the types of fairs to be held, their frequency, the selection of host cities and some aspects of their organization and operation. It works through diplomatic channels with the federal governments of its member nations and of the country hosting a world's fair. The fairs over which it has jurisdiction are of a non-commercial nature and exclude such events as trade shows. They are of two types: 'Registered' fairs, which are the larger type, formerly known as Universal Expositions, and 'Recognized' expositions, formerly called 'Specialized' expositions.

Due to the proliferation of Expos in the 1980s and 1990s, the BIE enacted amendments to its Regulations mandating that major Registered fairs could only be held every five years starting in 1995 and that one minor or Recognized fair should be held in the years between major fairs. Registered fairs are large, six month events where the host country and participants (nations, international organizations such as the United Nations, and corporations) build individual pavilions. Expo '67 (Montreal), Expo '70 (Osaka), Expo '92 (Seville), Expo 2000 (Hanover), Expo 2005 (Aichi), and Expo 2010 (Shanghai) are the recent modern examples; Milan will hold the next one in 2015. The world expo scheduled for 2025, which is the subject of this Expo Report, will be a Registered fair.

Recognized fairs can now have sites no more than 25 hectares (approximately 62 acres) in size, last a minimum of three weeks and a maximum of three months, and the host country builds the exhibit space to be occupied by all participants. Recent examples of the earlier variety of recognized fairs are Expo '86 (Vancouver), Expo '88 (Brisbane), Expo '91 (Plovdiv), Expo '92 (Genoa) and of the new, smaller type are Expo '98 (Lisbon), Expo 2008 (Zaragoza) and Expo 2012 (Yeosu). Astana, Kazakhstan, will hold the next one in 2017.

## Key Findings

Based on our review of the Supporting Information and our discussions with stakeholders, certain key findings are readily apparent:

- ▶ Canada's membership in the BIE will expire on December 19, 2013;
- ▶ The Federal Government of Canada (the "**Federal Government**") has indicated that it has no intention of renewing Canada's membership in the BIE and the Federal Government is not supportive of World Expos as it believes that World Expos are irrelevant in the modern internet age. Canada will not be participating in Expo 2015 (Milan) and the Federal Government did not support the city of Edmonton's bid for Expo 2017;



- ▶ Without the Federal Government making the approach to host the Expo there is little, if any, chance of being awarded an Expo. The BIE will not accept a bid from any government level lower than the federal level, so federal support is critical. As such, unless there the City can convince the Federal Government to change its policy, a Toronto bid for 2025 is not feasible.
- ▶ There are significant costs to bidding for a World Expo (estimated at \$10 to \$15 million) and with hosting the Expo (estimated at approximately \$1 billion to \$3 billion on a net basis).
- ▶ While certain of the bidding costs cost may be covered by sponsorships and certain of the capital costs are for long term infrastructure which the City needs; the level of expense requires the support of the Province of Ontario and the Federal Government. However, these other orders of government will require significant work to be done before they agree to support the Expo;
- ▶ A significant benefit of hosting a world expo are improvements in infrastructure and transit. The illustrative costs for the Expo include significant transit infrastructure (either an LRT or a subway are detailed later in this Expo Report);
- ▶ The BIE does not have specific design requirements, and therefore the design and layout are up to the host city's imagination. As such, the capital costs can vary significantly from expo to expo.
- ▶ Expo revenues are driven by the attendance (estimated at \$40 to \$55 million) at the expo and not from television or other media. An expo is in effect a regional marketing tool and not a global branding event such as the Olympics. Approximately 95% of the visitors would likely be from Canada or the US. A review of expo attendance data from prior expos indicates that international travellers are seldom more than 5% of the total.
- ▶ A review of the literature provides a mixed message with respect to the long term tourism impact of hosting an expo. Our preliminary view of the data is that it suggests that there is a modest growth in tourism after an expo. However, further work is required to assess with greater certainty and to determine the extent to which observed tourism increases are attributable to the expo.
- ▶ For purposes of the illustrative scenario, we have assumed that the Port Lands is likely the site best suited to hosting an expo, meeting the requirements for a contiguous site and showcasing the city's waterfront. Further analysis should be done before selecting this site.

This Expo Report has assumed that a political compromise is possible, opening the way for a potential Toronto bid for 2025, if City Council so decides.

## Expo Bid Process

The BIE, as the governing body of the World Expositions has a very well developed process to determine which city will host a World Expo. The following is a high level summary of the process, along with the relevant timelines (as estimated by EY based on the timeline published by the BIE), to choose the city to host the 2025 World Expo. EY notes that certain steps are not set out here, but are covered in more detail elsewhere in this Expo Report.

Step	Timeline
Candidacy Applications is submitted to BIE by Heritage Canada, the department in the Federal Government assigned to deal with Expos. Once one candidacy application is received by the BIE any other city must submit within 6 months	Earliest date is May 1, 2016; if any other city applies on May 1, 2016 then November 1, 2016 would be latest possible date for other applicant
Enquiry mission sent by BIE assesses Candidate's applications and the feasibility of City's bid.	May 2017
Bid Committee responds to enquiry mission's comments	June/July 2017
Several months after the evaluation commission releases its report, the final bids are presented at a session of the BIE. Each member state has one vote	Fall 2017
A Candidate City is chosen by BIE	November 2017

Based on the timeline above, a Toronto bid for 2025 will require an immediate mobilization of resources (Toronto staff/consultants, corporate sponsors, and the public through consultations) to enable a Toronto bid to be successful. The immediacy is driven by the following reasons:

- ▶ Both Heritage Canada and the Ministry of, Culture and Sport Tourism (the federal and provincial government bodies, respectively, that would deal with an Expo bid) were very clear in the requirements for a detailed feasibility study including a detailed business plan to support a decision on the bid as well as the need for evidence of public and corporate support for a bid;
- ▶ Time will be required to get a political “buy-in” from all three orders of governments. This is especially true given the current position of the Federal Government;
- ▶ Public consultation is critical to the success of a bid. The public must be engaged and supportive if a bid is to be successful politically with all three orders of government and with the BIE;
- ▶ Corporate support, sponsorships and leadership are keys to success, and it will take time to gather this support and negotiate financial sponsorship deals;
- ▶ To win an Expo vote requires a significant effort in marketing and negotiation with BIE member states; and
- ▶ The City of Toronto council must have sufficient information prepared to formulate an informed decision.

Based on the above, we have prepared the following suggested timeline so as to be ready to submit a candidacy application in November 2016:

Step	Timeline
City prepares full feasibility study including detailed business plan to support potential bid and other due diligence	Winter/Spring 2013/2014
City negotiates with Federal government to extend BIE membership. BIE will only recognize federal government in bid process and will <u>not</u> accept bid from any other party.	Prior to December 31, 2013
City undertakes public consultation and seeks corporate sponsorship	Winter/Spring 2014
City Council gives direction to City staff to continue with bid process	Spring/Summer 2014
City approaches federal and provincial and private sector to gain support for bid	Spring/Summer 2014

Step	Timeline
If Federal and Provincial support received, then multi-party agreements are negotiated	Fall 2014
Selection of Bid committee and Bid leadership. Begin preparation of formal bid	Fall/Winter 2014
Formal submission of bid to Heritage Canada for approval	Summer 2015
Heritage Canada establishes evaluation committee and meets with 2025 Bid committee	Fall 2015
Heritage Canada evaluation committee reports to PMO with recommendation.	December 2015

## Overview - Quantitative factors

Hosting a World Expo is a major undertaking that requires significant investment from a number of parties.

As detailed elsewhere in this Expo Report, there are a large number of variables that impact the total quantum of spending related to the World Expo. Such factors will be discussed in more detail elsewhere in this Expo Report.

Based on the results of previous World Expo and the forecast costs for the 2020 World Expo bids, EY has prepared a preliminary illustrative estimate (the “**Illustrative Scenario**”, details of which can be found in the Financial Considerations section of this Expo Report) of the revenues and expenses as follows:

(\$millions)	City		Province/Federal		Expo Corporation		Total Canada		Corporate/Foreign Gov't	
	Low	High	Low	High	Low	High	Low	High	Low	High
Admissions	-	-	-	-	500	1,100	500	1,100	-	-
Sponsorships/Corporate pavillions	8	13	-	-	80	150	88	163	60	240
Foreign Government Contribution	-	-	-	-	-	-	-	-	540	2,160
Other visitor spending	-	-	-	-	200	550	200	550	-	-
Food/Beverage	-	-	-	-	100	200	100	200	-	-
Asset sales	-	-	-	-	400	500	400	500	-	-
Tax revenue	-	-	2,590	5,416	-	-	2,590	5,416	-	-
Expo Corporation surplus	-	-	80	900	-	-	-	-	-	-
<b>Total revenue</b>	<b>8</b>	<b>13</b>	<b>2,670</b>	<b>6,316</b>	<b>1,280</b>	<b>2,500</b>	<b>3,878</b>	<b>7,929</b>	<b>600</b>	<b>2,400</b>
Bid process	(10)	(15)	-	-	-	-	(10)	(15)	-	-
Pavillion construction - see Note 1	(75)	(150)	(1,500)	(2,100)	-	-	(1,575)	(2,250)	(600)	(2,400)
Pavillion Operating costs	-	-	-	-	(1,200)	(1,600)	(1,200)	(1,600)	-	-
Infrastructure	-	-	(1,250)	(5,500)	-	-	(1,250)	(5,500)	-	-
Security	-	-	(400)	(900)	-	-	(400)	(900)	-	-
Contribution of land - see Note 2	(400)	(800)	-	-	-	-	(400)	(800)	-	-
<b>Total expenses</b>	<b>(485)</b>	<b>(965)</b>	<b>(3,150)</b>	<b>(8,500)</b>	<b>(1,200)</b>	<b>(1,600)</b>	<b>(4,835)</b>	<b>(11,065)</b>	<b>(600)</b>	<b>(2,400)</b>
<b>Surplus/(deficit)</b>	<b>(477)</b>	<b>(952)</b>	<b>(480)</b>	<b>(2,184)</b>	<b>80</b>	<b>900</b>	<b>(957)</b>	<b>(3,136)</b>	<b>-</b>	<b>-</b>

Note 1 - Pavillion costs include costs paid by Canadian Governments and by Foreign Governments/corporations

Note 2 - Contribution of land is a non-cash expenditure

Key Assumptions:

- ▶ The Illustrative Scenario contemplates the following major items:
  - ▶ The Port Lands will host the Expo pavillions and related exhibition infrastructure;
  - ▶ A site of up to 600 acres is contemplated;
  - ▶ The construction of either an LRT line to Cherry Street (in the Low scenario) or the eastern leg of the Relief Line subway (in the High scenario). Such items would be required to allow large numbers of patrons to reach the Expo site; and



- ▶ Remediation would need to be performed on the Port Lands site to allow for construction. Such remediation would consist of soil remediation and flood proofing. Other infrastructure, such as bridges, would likely also need to be constructed;
- ▶ The Illustrative Scenario above does not contemplate certain specifics, such as the number of pavilions, the nations attending or other similar specifics. Further detailed planning would need to occur in order to refine the figures above once more information became available.
- ▶ The host city is not necessarily a significant contributor of funds to any Expo process. Rather, the host will contribute a fixed amount of cash and/or land for the building of venues or other sites used during the Expo. The actual City contribution would be a matter of negotiation with the Provincial and Federal Governments. In the Illustrative Scenario above we have assumed that the City provides most of its contribution in the form of land;
- ▶ The provincial and/or federal government is typically the largest source of funds in terms of infrastructure and security spending. The capital costs can vary significantly depending on the design and vision for the Expo. The illustrative estimates above are based on reviews of past expos, past feasibility studies and Expo 2020 candidate plans. For Illustrative purposes we have shown the capital costs as being funded primarily by the Federal Government and the Province and the operating costs as being funded by the Expo Corporation. It is assumed that the Province and the Federal Government provide funding and/or access to financing (for both capital and operating costs) at government rates due to their guarantee of any indebtedness. Borrowing costs are included in operating costs;
- ▶ The revenues for the World Expo are based on an estimated attendance of 40 million to 55 million (95% from Canada or US and 5% international) and certain other assumption detailed in the Financial Considerations section of this Expo Report. Any operational surplus of the Expo Corporation is assumed to be used to repay the Provincial and Federal Governments' contributions as they will be making the greatest financial contributions;
- ▶ Tax revenues have been estimated based on the capital, operational and tourism spending in illustrative scenario above and are detailed in the economic impact section of this Expo Report;
- ▶ The illustrative infrastructure estimates assume certain remediation/servicing costs for the Port Lands based on figures provided by certain city agencies and a LRT line is built to Cherry Street and/or the eastern leg of the proposed downtown relief line. These costs are illustrative only as determination of the actual requirements and costs are outside the scope of this Expo Report and these infrastructure decisions are to be decided by the City. Specifics regarding infrastructure spending are detailed in the table below;

Infrastructure details	Low	High
Portlands remediation	500	1,100
LRT construction	500	-
Subway construction	-	4,000
Other	250	400
<b>Total</b>	<b>1,250</b>	<b>5,500</b>

- ▶ The routes for the rapid transit in the table are detailed later in this Expo Report.
- ▶ The Expo Corporation is the entity through which most of the operational transactions occur and is not generally a contributor of infrastructure.

*Employment and GDP Impact*

Based on the illustrative scenario above, we have prepared an estimate of the potential economic impact and the potential jobs which could result from Expo 2025:

	Low	High
GDP created (\$ millions)	7,400	15,500
Jobs created	92,000	190,000

The details of the GDP and employment figures are detailed in Economic Impact section of this Expo Report. EY notes, however, that the figures above represent cumulative totals from the time the Expo is awarded through completion of the event (i.e. 7 to 8 years).

*Risks to Illustrative Revenues and Expenses*

EY cautions that the revenue and expenses contemplated by the Illustrative Scenario are subject to significant variation for the following reasons:

- ▶ Forecast revenue from either admissions or sponsorship may not materialize necessitating increased contributions from other orders of government;



- ▶ The estimated pavillion costs detailed is based on prior expo studies and other expos. The actual pavillion costs will be driven by the theme and design of the actual pavillions. A further detailed pavillion review is strongly recommended;
- ▶ The level of infrastructure spending is entirely dependent on the nature/goals of hosting the Expo. Significantly more spending may be required; and
- ▶ The degree of spending by each party is subject to negotiation among the parties. It is possible that the City could be responsible for contributing more than as outlined in the Illustrative Scenario

## Overview - Qualitative factors

The following is a summary of the strengths, weaknesses, opportunities and threats of a potential Toronto bid for the Expo:

<p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▶ The City is well positioned geographically with over 78 million people within an 800 km radius</li> <li>▶ A number of large areas could possibly be available for a new World Expo (Port Lands, Downsview, Exhibition Place/Ontario Place)</li> <li>▶ World Expo could kick start development in Port Lands</li> <li>▶ There is also some sentiment that it is now Canada's turn to host an exhibition.</li> <li>▶ Canadians have an excellent track record in hosting very successful exhibitions that have fulfilled the BIE's requirements. The BIE may expect a successful Toronto 2025 World's Fair.</li> <li>▶ Canada is seen as a stable country and its cities as clean and safe places to visit.</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▶ Toronto has historically not been as aggressive in promoting itself abroad as other cities according to stakeholders with whom we spoke</li> <li>▶ The main weakness of a Toronto bid is the difficulty that may be encountered in gaining the complete and unified support of the three orders of government. This support is critically necessary to the success of the bid in terms of financial guarantees and diplomatic resources for intelligence gathering and assistance in the lobbying campaign.</li> </ul>
<p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▶ No North American city has hosted the World Expo since Vancouver 1986, so 2025 could be a good chance to bring the Expo back to this continent</li> <li>▶ Toronto is a very diverse city and this may play well with members of the BIE</li> <li>▶ Provided the Pan Am Games go well in 2015, Toronto will be able to demonstrate that it is capable of organizing a large scale event</li> <li>▶ World Expos may leave significant legacy items for the host city (transit infrastructure, etc.)</li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"> <li>▶ Canada' membership in BIE expires December 19, 2013</li> <li>▶ Federal government has indicated it has no intention of renewing membership in BIE</li> <li>▶ City residents may feel that funds are best used for other city building purposes and not a World Expo</li> <li>▶ The awarding of the Expo is a highly political process and there is no guarantee that the best technical bid will be awarded the World Expo</li> </ul>



## Risks

There exist a number of risks to any hosting of an Expo. These include, but are not limited to, the following:

- ▶ The threat of terrorism, in the post 9/11 world and after the Boston marathon bombing, remains a significant risk for any mega event such as a World Expo. Typically a world expo attracts heads of state from the participating countries and large numbers of people. While the use of a single site like the Port Lands simplifies the security issues, we expect that security costs will be significant given the length of the fair (180 days and the large number of attendees and political figures);
- ▶ Costs could significantly exceed budgets. This has been very common in other mega events and has occurred in expos and consideration should be given to this fact when preparing the detailed forecast of expenditures related to Expo 2025. We note that Expo 2000 (Hannover) had an estimated loss of \$600 million due to low attendance, while Expo 2010 (Shanghai) and Expo 2005 (Aichi) reported profitable fairs;
- ▶ Forecast attendance or other revenue could fail to materialize. This would likely leave other orders of government, as Expo funding guarantors, to make up any shortfall. Such shortfalls could be material. The success of the fair is dependent on a properly executed marketing plan, good economic conditions, no significant border issues and providing good value to get the all-important word of mouth working for the fair;
- ▶ Expo partners could fail to live up to their commitments. Such a scenario could include delays to venue or pavillion construction, shortfalls in security levels, or other negative impacts. Such shortfalls may reflect poorly on the City and negatively impact the Expo's legacy;
- ▶ Public opposition to the Expo could doom any bid, as the BIE increasingly looks for broad support before awarding the World Expo;
- ▶ The City may not market itself appropriately to the relevant BIE members and stakeholders. This has previously harmed bids by the City; and
- ▶ The future geopolitical landscape may minimize attendance at the Expo.

## Lessons learned from previous World Expo Bids

Based on discussions held with a number of parties and a review of the literature, EY has determined that the points below are significant lessons learned from previous large scale events:

- ▶ It is critical that any Expo bid clearly identify the vision and aims of the proposed event. The BIE has become increasingly interested in the legacy and long term impacts of the World Expo;
- ▶ The City must plan ahead very early in the bid process to ensure any goals or risks are dealt with at an early stage. As the Expo approaches the City will have decreasing leverage, so it is important to determine what each party's deliverables will be early on;
- ▶ The importance of properly campaigning for the Expo cannot be overstated. Given the nature of the bid process, it is very important to connect with the right people and organizations, no matter how strong the technical bid may be, given the highly political nature of BIE voting;
- ▶ Building a broad consensus (multiple layers of government, residents, special interest groups etc.) is very important. The BIE does not view lack of consensus favourably;
- ▶ The quantum of spending is primarily driven by the legacy impacts that the host city and other layers of government wish to achieve. There are no prescribed "must haves" for an Expo - it is up to the imagination of the Expo Corporation;
- ▶ Co-ordination between the City and the Expo Corporation will be very important so that logistical issues may be addressed well ahead of the Expo;
- ▶ Clear governance of the Expo Corporation is essential to ensure all orders of government are kept properly informed;
- ▶ A theme which all member of the BIE find relevant is very important. It has to represent Toronto but be innovative in nature as it will drive interest in the Expo; and
- ▶ A clear champion must be selected to run the Expo organization - someone with a high profile, well connected politically, and who can devote themselves full time to this project until completion.

## Long-term tourism impacts

While it is clear, that a world expos has a positive impact on tourism during the period of the expo we looked at long term tourism impacts as well. We have received a number of studies with respect to the impact of large events on the long term tourism impact on cities which host World Expos, as well as a review of tourism data for countries which held World Expos to determine where there is a correlation between the holding of these events and long term tourism on a city.

The tourism data which we have reviewed indicated moderate to significant increases in tourism after certain expos; however, there is insufficient data to assert a correlation between these increases and the expo. The reasons for the increases could be related to geo-political reasons, security issues in prior years, general economic conditions, foreign exchange rates or other events in the city or country. Further analysis will be required including interviews with the tourism bureaus in host cities, reviews of hotel room occupancy data as correlated with local economic conditions to provide a basis on one side or the other.

One thing is certain, however. The Expo would almost certainly increase tourism during the Expo. However, the degree to which this cannibalizes more “normal” tourists is not known.

## Legacy / Reasons to bid

Given that legacy is a cornerstone of any Expo, the following items should be considered if the City is to pursue a bid:

- ▶ The Expo could be a major catalyst for redeveloping underused parts of the City such as the Port Lands. While development will eventually come to the Port Lands, the expo could accelerate this development and provide the city with increased property taxes and development charges sooner rather than later;
- ▶ Infrastructure improvements are often a by-product of world expos and funding for infrastructures from the Federal/Provincial governments. Shanghai is rumoured to have spent up to \$48 billion in infrastructure improvements building roads, sewers, subways and bridges;
- ▶ Economic development can be spurred as part of hosting the Expo, although there is conflicting evidence in terms of the long term impact of tourism in the City;
- ▶ The City can use the Expo to spur the arts and cultural sectors in the city and provide them with a wider audience, given the global nature of the Expo;

- ▶ Communities can be improved through Expo related infrastructure construction. Furthermore, certain aspects of Expo infrastructure can be converted to other uses to provide community housing or tourist attractions such as the bio dome in Montreal;
- ▶ Expo is an opportunity to engage at-risk youth by designing programs such as business or cultural mentorships as part of the expo; and
- ▶ Hosting the Expo could solidify Canada's reputation as a trustworthy host for further significant mega events and increase the likelihood that the nation will be awarded future large scale events.

## Next steps

As required in the Statement of Work and as more fully detailed later in this Expo Report, EY recommends the following to more fully support the City's decision with respect to a potential bid for the Expo:

- ▶ A detailed economic impact assessment should be carried out. This Expo Report did not conduct the necessary new research to assess the impact of hosting the Expo;
- ▶ The City should began to assess community support for hosting the Expo through a series of public consultations to ensure that the residents of the City are solidly behind any potential bid, as the BIE is not likely to be receptive to a bid from a city whose populace is not solidly in support of such bid;
- ▶ Additional analysis with respect to transit, other municipal infrastructure and planning considerations should be done to more precisely forecast the necessary spending;
- ▶ The preparation of a detailed business plan should be completed to fully assess the potential revenues and costs of holding the Expo. It is highly unlikely that other orders of government will agree to participate in any bid without the City having done significant market sounding and business planning;
- ▶ Consideration should be given to who would lead the city's bid for the Expo;
- ▶ A valuation of all appropriate City-owned land that could be used for venues including an assessment of the increase in value and potential marketability of said land as a result of infrastructure and other capital spending should be performed.

- ▶ A detailed analysis of the long term tourism impact of hosting mega events, such as hosting the Expo including interviews with local host city tourism officials, reviews of local hotel stay data and other tourism data points should be undertaken.
- ▶ An assessment of the potential legacy for the Expo, including such items as infrastructure, development of the Port Lands and encouraging the mentoring of the City's youth in meeting business, artistic and other cultural leaders from Canada and other countries.
- ▶ The development of community housing as part of the housing of foreign pavilion participants.
- ▶ As detailed later in this Expo Report, EY estimates that the cost to carry out the work above, in addition to costs incurred by various City agencies, at approximately \$350,000 to \$400,000.

# World Expo Bid Procedures

## Relevant Parties in an Expo Bid

In the bidding process for each Expo, there are a number of stakeholders and interested parties. These include the following:

Party	Role
Host city	<ul style="list-style-type: none"> <li>▶ Expresses interest in hosting a bid</li> <li>▶ Works with the Expo Corporation to provide necessary services to ensure a successful Expo</li> <li>▶ Role diminishes as Expo approaches</li> <li>▶ Financial contribution is generally limited but is in accordance with the agreement between the relevant parties</li> </ul>
Expo Corporation	<ul style="list-style-type: none"> <li>▶ Party that coordinates all aspects of the Expo</li> <li>▶ Receives all funds including admission revenue, sponsorships etc.</li> <li>▶ Board will be made up of a cross section of stakeholders</li> </ul>
Provincial/Federal Government	<ul style="list-style-type: none"> <li>▶ Provides guarantees to BIE for Expo funding</li> <li>▶ Typically will have seats on the Expo Corporation board</li> <li>▶ Often the source of funding for large scale infrastructure and capital spending</li> <li>▶ Will be consulted on major aspects of the Expo given their financial interests</li> </ul>
Bureau International des Expositions	<ul style="list-style-type: none"> <li>▶ Awards the World Expo to the Host City</li> <li>▶ Regulate certain aspects of the event</li> </ul>

Note 1: The term Expo Corporation is used to denote the committee or committee's which organize the Expo Bid whether in form of Not-for-profit corporation or otherwise.

## Summary of BIE bid procedures

As noted in the Executive Summary Section, if the City wishes to pursue a 2025 World Expo, certain stages will be need to be started right away so as to gain federal, provincial and public support. A timeline for a potential Toronto bid for a World Expo in 2025 is as follows:

Step	Timeline
City prepares full feasibility study including detailed business plan to support potential bid and other due diligence	Winter/Spring 2013/2014
City negotiates with Federal government to extend BIE membership. BIE will only recognize federal government in bid process and will <u>not</u> accept bid from any other party.	Prior to December 31, 2013
City undertakes public consultation and seeks corporate sponsorship	Winter/Spring 2014
City Council gives direction to City Staff to continue bid process	Spring/Summer 2014
City approaches federal and provincial and private sector to gain support for bid	Spring/Summer 2014
If Federal and Provincial support received, then Multi-party agreements are negotiated.	Fall 2014
Selection of Bid committee and Bid leadership. Begin preparation of formal bid.	Fall/Winter 2014
Formal submission of bid to Heritage Canada for approval	Summer 2015
Heritage Canada establishes evaluation committee and meets with 2025 Bid committee	Fall 2015
Heritage Canada evaluation committee reports to PMO with recommendation.	December 2015
Candidacy Applications is submitted to BIE by Heritage Canada. Once one candidacy application is received by the BIE any other city must submit within 6 months	November 2016 (at earliest)
Enquiry mission sent by BIE assesses Candidate's applications and the feasibility of City's bid.	May 2017



Step	Timeline
Bid Committee responds to Enquiry mission’s comments	June/July 2017
Several months after the Evaluation Commission releases its report, the final bids are presented at a session of the BIE. Each member state has one vote	Fall 2017
A Candidate City is chosen by BIE.	November 2017

As with any major event, a number of criteria are used to evaluate the competitive position of each party. When analyzing a potential bid for the City, the following points should be considered:

- ▶ The local, national or international reasons that have prompted the proposal to mount the exposition, and the noteworthy results that might be anticipated;
- ▶ The theme and objectives of the exposition, in sufficient depth to permit an assessment of its viability for presentation in that medium;
- ▶ The legislative, organizational, operational and financial measures already taken or proposed to ensure the administrative good order of the exposition and its conformity to the requirements of the BIE;
- ▶ The broad publicity strategy to promote the exposition, and the creative material available;
- ▶ The general location and its merits, and the site or sites proposed for the exposition, and the plans for development and for after-use, the relationship of the sites to local and international transportation and the movement and physical welfare of visitors;
- ▶ The nature of the exhibitors anticipated and possible solutions in the allocation of sites, pavilions, other types of cover and open space to both international and domestic exhibitors, thematic presentations, conventions, seminars and related events, concessionaires, cultural and recreational activities;



- ▶ The maximum and minimum space likely to be permitted to foreign nations, and any architectural planning control, or modular plan on which pavilions for such participants might be based; and
- ▶ The number of visitors anticipated and the types of visitor likely to attend the exposition.

The Toronto bids for Expo 98 and Expo 2000 had no difficulty in answering these questions to the satisfaction of the BIE. Moreover, the success of Canada's two fairs, Montreal 1967 and Vancouver 1986, should provide the BIE with some assurance that a future Canadian fair would likely be very successful judged against many measures.

The organizer of a Toronto 2025 fair will need to undertake a number of detailed studies to answer these questions, including more definitive attendance, site planning and design studies, elaboration of the theme concept, and financial planning analyses, among others. These items are outlined in our next steps section of the Expo Report.

### BIE Bid Requirements

Candidate Cities are required to complete a detailed questionnaire for BIE review. The questionnaire contains detailed questions on each city's readiness to host the Expo. The questionnaire and other information required by the BIE include:

- ▶ The city's theme, concept and legacy for the Expo;
- ▶ Venue considerations (locations total area, maximum and minimum space for participants);
- ▶ Environmental and meteorological data;
- ▶ Details regarding hotels and other accommodations in each city;
- ▶ Transportation links;
- ▶ Safety and security during the Expo;
- ▶ Financial feasibility and financial guarantees under Article 10 of the BIE conventions;
- ▶ Legal aspects, including customs and immigration formalities;
- ▶ Government and public support for the Expo; and
- ▶ Finance and marketing plans for World Expo's
- ▶ Estimated attendance for Expo;
- ▶ Analysis of potential cost for participating nations and strategies to maximize their costs; and
- ▶ Level of support with all orders of government, corporate and public.

A copy of the regulations for the Expo and the BIE protocol are included as Appendix "E" to the Expo Report.

## Federal Government

The host nation is responsible for building a major pavilion representing the nation. It is anticipated that each province may wish to participate as well and build pavilions.

The BIE requires that the host government guarantee the finances of the Expo corporation, including any deficits that may result and must provide security for the Heads of State and other VIPs that visit the Expo. In the past the Canadian government has had this responsibility and also been a major shareholder of the Expo organizing body. However at Vancouver's Expo 86 the Federal Government transferred responsibility for funding, management and operation of Expo 86 to the provincial government. This precedent became the norm for subsequent Expo bids by other Canadian cities.

Federal responsibilities during the bid phase will include:

- ▶ The Federal Government through the Department of Canadian Heritage ("**Heritage Canada**") and a specially convened Independent Review Committee evaluates the host city's bid to ensure that it complies with its own policies and those of the BIE.
- ▶ Once approved, the Federal Government, through the Prime Minister or his designate, is responsible for submitting the host city's bid to the BIE.
- ▶ The Federal government plays a key role in lobbying on behalf of the bid. It does this through its embassies and Consulates in the BIE member countries and its delegate at the BIE. There are approximately 170 delegates that vote on awarding an Expo.
- ▶ These steps may take up to three years to complete given all of the various consultations that need to occur.

## Provincial Government

The Provincial government is responsible for guaranteeing the finances of the Expo Corporation. The Ministry of Tourism, Culture, and Sport ("**MTCS**") is the lead Ministry in reviewing documentation supporting a bid and seeking approval for the Management Board and Cabinet for any financing required. Since it is the principal financial backer of the Expo bid it should play a key role in all decisions and organizations in the bid process. The Province as the main contribution would have majority control over the appointments to the board of directors and would control the Expo.

The MTCS would likely build a major pavilion representing Ontario at the Expo if Toronto wins the bid.

### City of Toronto

The City of Toronto has initiated the Expo Report that may lead to a decision to bid for Expo 2025; consequently it will be responsible for commissioning and funding (or sharing in the funding) of further studies required to document the bid for the Province, the Federal government and the BIE. The city may consider getting corporate sponsorship for this stage.

The City, in order for the bid to proceed must take a leadership role in actively advocating for the bid with the Province, the Federal government and the BIE. While the Province will have control over the majority of the Board of Directors, the City can play a significant role in design of the organization, theme and overall plan for the Expo.

EY is of the view that the City will have the most influence at the beginning of the bid process while multiparty agreements are being developed. The reason for this is that the City will have less organizational influence as time progresses due to the nature of the way the Expo is organized and run. As such, it is imperative that any concerns the City has with respect to any aspect of the bid (City building, diversity issues, venue location etc.) be addressed at the beginning of the process. It is also critical that any resources required of the City be spelled out at the beginning of the process as the negative impact of any issues will borne by the City, not the Expo Corporation.

It is important to convey the City's vision of Expo to other stakeholders prior to beginning the bid and organizing process. By putting the City's vision at the forefront of any process, it will be possible to ensure that all decisions are made in the appropriate context. If the vision is not clear, many of the benefits of hosting the Expo could be lost.

## **Federal and Provincial Process to Select a Host City**

In discussions with Heritage Canada (federal) and the Ministry of Tourism, Culture and Sport (Provincial), EY has learned the following:

- ▶ It is necessary for the potential Host City to build a strong case for both orders of government to consider. Ultimately the appetite for higher orders of government to participate in any bid will be about the "dollars and cents" that they will be required to contribute.

- ▶ It will be necessary to obtain the support of a number of departments within each of the Federal and Provincial governments. Given that each department will have its own agenda, it will be imperative to make sure that the benefits of any bid is clearly laid out and addresses each department's concern.
- ▶ It is imperative that the potential Host City demonstrate a strong legacy, as this will make any investment easier to approve given the tangible, long lasting benefits to the City and the surrounding area. In the case of an expo, the legacy will be cultural, mentoring youth, potential infrastructure projects, as well as the development of the Port Lands.
- ▶ It will be important for the City, should it decide to pursue a bid, to demonstrate that sufficient room for cost overruns has been built into any budgets approved by the relevant legislature. Financial controls and a proper risk assessment will need to be part of a detailed feasibility assessment.
- ▶ Government will be particularly sensitive to the concept of economic free-riding by private sector participants. Many parties stand to benefit significantly from any Expo, so it will be important to ensure that those who have economic "upside" also share some risks.
- ▶ The federal government has gone on record saying that they will not provide blank cheque financial guarantees for events such as World Expo. Rather, they will contribute predetermined amounts of funding.
- ▶ The City, if it decides to bid for the Expo, will need to demonstrate why they want to host and what aspects of the City they are looking to leverage.

## Key Findings on Bid Process

Based on the process laid out above, EY has the following comments:

- ▶ The City, if it decides to pursue an Expo bid, will need to have both the federal and provincial governments supporting any bid. Notwithstanding the requirement to have governmental guarantees, it is important to have both orders of government supporting the bid due to the financial outlay that will be required of them for infrastructure and other costs.
- ▶ In addition to higher orders of government, it is critical to have the residents of the City support any bid to host the Expo. Such support is very important to the BIE.

- ▶ The Federal government has given notice of intent to withdraw from the BIE on December 19, 2013. Without the Federal Government making the approach to host the Expo there is little, if any chance of being awarded an Expo. The BIE will not accept a bid from any level lower than the federal level so federal support is critical.
- ▶ The minimum cost to submit a bid, which represents only application fees to the BIE, is at least (US) \$100,000. This amount is non-refundable in the event of an unsuccessful bid. As discussed elsewhere in this report, significant other costs will be incurred.
- ▶ It will be necessary to clearly demonstrate to the BIE that there is a strong vision/theme to the bid. It has become clear over the last several cycles that the BIE is of the view that such a vision/theme is imperative in order to supporting the lasting legacy that the BIE desires of modern Expos. Appendix "C" contains a summary of the themes of past World Expos.
- ▶ Although it is important to have plans well developed during the bid process, the City must remain aware that the Evaluation Committee's report could require significant changes to the venues, infrastructure or other segments of the bid.

# Competitive Landscape for the 2025 World Expo

## Other Canadian Cities Potentially Hosting the 2025 World Expo

Based on a review of available public media sources, EY has concluded as follows:

- ▶ It appears that no other Canadian city has expressed an interest in hosting the Expo.

Based on the factors above, it appears that the City would have no significant competition in obtaining approval to submit a bid for the 2025 World Expo.

## Past History of World Expos

- ▶ It is possible that geographic considerations may come into play in selecting the host city. For example, certain members of the BIE may be predisposed to vote for or against certain countries or continents based on a number of factors (impact on historic sites etc.). The table below sets out the hosts of the Registered World Expos since 1958.

Host city	Year Held	Continent
Brussels, Belgium	1958	Europe
Montreal, Canada	1967	North America
Osaka, Japan	1970	Asia
Seville, Spain	1992	Europe
Hannover, Germany	2000	Europe
Aichi Japan	2005	Asia
Shanghai, China	2010	Asia
Milan, Italy	2015	Europe

Of the 8 registered world expo listed above, 4 have been held in Europe. The implication of this is that there is a tendency to award the world expo to a European country, which is not surprising since Europe has approximately 25% of the voting members of the BIE.



- ▶ The chart below sets out the composition of the delegates of the BIE:

Continent/Region	# of Delegates
Europe	41
Middle East	15
Africa	45
Asia	23
Caribbean	11
North America	2
Central America	7
South America	11
Oceania/Australasia	<u>12</u>
Total	167

As there are only 2 member countries in North America (Mexico and Canada) as the U.S. is not a member, there are limited voting blocs that may be naturally inclined to vote for a Registered fair in the City.

As noted above, no North American city has hosted a Registered fair since Montreal in 1967 (Vancouver in 1986 was a Recognized fair). This has a positive effect on a potential City bid as a span of 58 years (from 1967 to 2025) is a significant period of time to be absent from one continent. Although the BIE does not have an official rotation policy, this type of consideration should have an effect on the decision process. There is some desire on the part of the BIE members to 'rotate' major fairs between continents although this is not specified in their regulations.

In November, 2013, the host city for the 2020 World expo will be announced. The following are the candidate cities. Attached in Appendix "F" is a sample of each city's design.

City	Country
Izmir	Turkey
Dubai	UAE



Sao Paolo	Brazil
Yekaterinburg	Russia

The selection of the expo city for 2020 will influence the vote for 2025 and will change the competitive landscape.

Based on media searches conducted by EY, we have identified a number of cities that may be considering hosting the Expo. However, given the early stage of bidding for the Expo, EY cautions that this list is preliminary only and that changes to the list are likely:

City	Country
Shanghai	China
Houston	USA
London	UK
Paris	France
San Francisco / Oakland	USA
Tehran	Iran

A summary regarding the relative strengths and weaknesses of each city is located in Appendix “D” to this Expo Report.

## Lessons Learned

## Lessons learned from previous bids

Based on discussion with a wide cross section of relevant stakeholders, we have concluded as follows:

- ▶ As the federal government has decided to terminate its membership in the BIE on December 19, 2013, engaging higher orders of government as soon as possible, and addressing the requirements for their support, is essential given that these parties will be funding the majority of capital spending associated with the Games
- ▶ In terms of winning the bid at the BIE, the best technical bid is not always the winner. As such, it is absolutely critical to market the City's bid to ensure that BIE concerns are being addressed and the federal government must play a significant role in meeting other BIE representatives and working to get their vote. It is not enough to have a great bid book and a great city - there is a lot of face to face negotiations and discussions.
- ▶ It is imperative that the Expo vision and legacy of the Expo be clearly communicated to all stakeholders so that each can assess the Expo's impact on them. This has become increasingly important to the BIE and is a must-have for any bid. Furthermore, such vision and legacy will assist in selling the Expo to a wary (given the cost and potential disruption to daily life) populace.
- ▶ The City must clearly define what it wants as a legacy from the Expo so that the Expo can be planned with this in mind. What are the cultural, innovative, business, social and environment goals for the Expo? By deciding what the City wants to achieve over and about the development of the Port Lands and infrastructure projects, a vision can be determined.
- ▶ The City must determine and negotiate its contribution and benefits early on in the process. The City's influence wanes as the Expo approaches, so it is imperative that it think ahead and ensure that all municipal concerns are addressed as early as possible.
- ▶ The Expo Corporation for the Expo does not have the City's interests in mind, as that is not its mandate, so the City must clearly lay out its position to the committee.
- ▶ The importance of having local stakeholders support the bid cannot be overstated. It is essential that consultations begin as soon as possible to address any opposition to the Expo. The BIE will require a large majority of the local populace to support the Expo in order to receive votes to become the host city.

# Financial Considerations Related to a Potential Bid for Expo 2025

As noted elsewhere in this Expo Report, hosting the World Expo is a huge financial commitment by a number of parties. This commitment can involve providing financing, the donation of goods or services or organizational expertise in hosting the event. In addition to the “out of pocket” costs discussed in this section of the Expo Report, it is clear that significant City of Toronto staff time (Finance, Planning, Transportation, TTC, Waterfront Toronto, Toronto Portlands Corp., etc) will be required. This section of the Expo Report sets out certain financial considerations for the City related to a potential bid for the 2025 World Expo.

## Financial impact of hosting the World Expo

EY cautions that the public disclosure of financial data is subject to a number of issues and that the actual disbursements may include items not directly related to hosting a World Expo. Furthermore, the total expenses include infrastructure items which may not be required for a Toronto expo.

There exist numerous other parties that may have a role in paying for the Expo. These could include:

- ▶ Federal government;
- ▶ Provincial/state governments;
- ▶ Municipalities; and
- ▶ Corporations.

Often the federal / state governments will pay for the infrastructure and venues associated with the Expo. The reason for this is that such facilities will continue to have ongoing benefits and are best owned by the relevant government entities. There can be wide variations in amounts of disbursements for a number of reasons including:

- ▶ Many jurisdictions will use the Expo as a way to install significant new infrastructure such as airports, roads or railways; and
- ▶ Often other parties will build certain venues for their ongoing use. Such parties could include professional sports teams, universities or other non-profit entities. Corporations will pay for pavilions and may sponsor operating and/or capital costs

## Financial impact of previous Expos Feasibility studies

There exist a number of risks associated with the spending above. These include the following:

- ▶ Without performing significantly more work to verify items included in the table below (i.e. costs to stage the Expo), it is not possible to know what items may have been excluded from the balances. As an example, the quantum of infrastructure spending, which is usually made by municipalities or other orders of government, is often not included in official spending for World Expos.
- ▶ The amounts above were translated into Canadian dollars at the average rate for the World Expo year despite the fact that expenditures likely occurred over a several year period for modelling purposes.
- ▶ Labour rates and other costs may not be consistent with those in Canada or the City, in particular. As such, more work should be performed to more accurately forecast certain of the costs above.
- ▶ Balances in the table above table are highly dependent on the host city's aspirations for the World Expo. As such, those Expos which are more transformational in nature will have higher spending associated.

EY has completed the following table of estimated costs from other feasibility studies for Canadian bids/potential bids.

Expo (\$M) <sup>1</sup>	Montreal 1967	Vancouver 1986	Toronto 1998	Toronto 2000	Ottawa 2005	Toronto 2015
Revenues	949	758	1,018	2,747	2,019	4,747
Operating Costs	1,330	524	426	1,186	971	1,886
Capital Costs	1,482	755	548	2,511	1,455	5,848
<b>Surplus/(Deficit)</b>	<b>(1,863)</b>	<b>(521)</b>	<b>44</b>	<b>(950)</b>	<b>(406)</b>	<b>(2,988)</b>

<sup>1</sup> All figures have been denominated in millions of 2013 Canadian dollar and translated using applicable CPI percentage changes.

## Estimated attendance at Expo 2025

### Methodology/Approach

The attendance estimate is one of the basic building blocks for all further planning for a world's fair: the size of site needed, the amount of exhibition space, the number of services, the operating costs and revenues, and planning, all are dependent on the number of visitors who will go to the Expo.

The usual method of estimating attendance is to identify the markets from which visitors may be drawn and then to estimate the attendance from each based on the experience at previous Expos. There are variables influencing attendance that the Expo organization does not control. These include:

- ▶ market size and demographic characteristics;
- ▶ world and national economic circumstances;
- ▶ world and host country politics;
- ▶ an attractive host city and country;
- ▶ competing attractions; and
- ▶ international travel conditions.

The variables that the Expo organization does control and that may influence the size of attendance include:

- ▶ a physically attractive site and the size of the site;
- ▶ number of major foreign participants attracted - the 'world' in 'world's fair';
- ▶ innovative and exciting master plan;
- ▶ admission ticket structure; and
- ▶ marketing and promotion programs.

The attendance estimate for Expo Toronto 2025 must rely on the experience at past Expos. The table below provides the attendance for the past 7 Registered fairs and the host city's population at the time of the fair:

City	Year Held	Attendance (millions)	Population (millions)
Brussels	1958	41	1.2
Montreal	1967	50	1.2
Osaka	1970	64	2.9
Seville	1992	42	0.7
Hannover	2000	18	0.5
Aichi	2005	22	2.2
Shangai	2010	80	23



### The Special Case of Canadian Expos

Toronto is in an enviable position to host a successful Expo 2025 and to reach the attendance target set for it. It is at the heart of heavily populated Canadian and U.S. regions whose residents have the characteristics – above average incomes and levels of education – of the typical fair visitor. The city is already an important tourist destination for Canadians outside Ontario, for Americans and for other foreigners. It has an extensive tourist and urban infrastructure that should be able to accommodate the number of visitors expected at Expo 2025. Canada has also hosted two of the most successful world's fairs - Expo 67 in Montreal and Expo 86 in Vancouver.

The pattern of attendance at Expos, of both categories, in Canada is different in a fundamental way from those in other countries. Montreal and Vancouver are approximately 125 km from the border with the USA. They were both able to draw a much higher percentage of their attendance from the large US population than other Expos from their neighbouring countries. The table below shows that Expo 67 (Montreal), a Registered Expo, drew 45% of its attendance from the U.S. while other Registered Expos, Expo 70 (Osaka) (with no abutting country), Expo 92 (Seville) and Expo 2000 (Hannover) drew at most 11% of their attendance from a number of their European neighbours. Similarly Vancouver 86, a recognized Expo, drew 24% of its attendance from the USA while Lisbon was the most successful Registered Expo in drawing about 9% of its attendance from its neighbour Spain.

Expo	BIE Category	Host Country	Major Adjacent Country	Other Countries
Seattle 1962	2	94.0%	n/a	6.0%
New York 1964	Not sanctioned	98.9%	n/a	1.1%
Montreal 1967	1	48.5%	44.8%	3.7%
San Antonio 1968	2	95.9%	n/a	4.1%
Osaka 1970	1	97.3%	0	2.7%
Spokane 1974	2	91.4%	n/a	8.6%
Knoxville 1982	2	94.6%	n/a	5.4%
New Orleans 1984	2	97.0%	n/a	3.0%
Tsukuba 1985	2	96.3%	0	3.7%
Vancouver 1986	2	74.0%	24.0%	2.0%
Brisbane 1988	2	90.0%	n/a	10.0%
Seville 1992 <sup>(1)</sup>	1	84.5%	10.9%	4.6%
Lisbon 1998	2	78.4%	8.6%	13.0%
Hannover 2000 <sup>(2)</sup>	1	89.0%	9.0%	2.0%
Aichi 2005	1	95.0%	0	5.0%
Shanghai 2010	1	94.2%	n/a	5.8%

Source: Steven Staples, Proprietary Database

Note 1. 10.9% of attendance originated from eight nearby countries.

Note 2. 9% of attendance originated from ten nearby countries

### Illustrative Attendance Estimate

It is expected that a Toronto Expo 2025 may have a similar result; it is 125 km from the U.S. border and within a day's drive of a very large population, estimated to be 78 million. However, we note that border requirements (U.S. citizens now require a passport) as well as U.S./Canada exchange rate have significantly changed since Expo 86.

The illustrative attendance estimated for Toronto 2025 is shown in the table below. It is based on the availability of a site of sufficient size to accommodate the large crowds that it would generate. It is also a conservative illustrative estimate based on the assumptions described below:

Illustrative Attendance Range	
Low	High
40 million	55 million

#### Key Assumptions in Attendance estimate:

- ▶ 78 million people (Canada and US) live within an 800km radius of Toronto;
- ▶ 95% of the visitors will come from Canada and the US and the majority of those will be within a one day drive (approximately 800 km);
- ▶ The attendance figures assume that attendees will visit the site on average between two and three times as out of town visitors will maximize their time at the expo and in town or more local residents will attend concerts and other cultural events at the expo. The number of unique visitors will be in the range of 15 million to 27 million;
- ▶ We have not included any seasonal passes in our illustrative estimates;
- ▶ U.S. visitors will be lower than past estimates due to stronger Canadian dollar and passport requirements at border; and
- ▶ Slightly higher international visitors than historic data due to increased international air links with Toronto and our increased diversity since the prior reports.

## Illustrative revenues and expenses for the Expo

EY estimated order of magnitude revenues and cost for a potential Toronto 2025 World Expo as summarized in the chart below. The ultimate results will be largely dependent on the scope of the Expo chosen by the City, but EY has made certain assumptions based on past Expos and items that are known to be required (e.g. remediation of Port Lands, necessary transit infrastructure etc.):

(\$millions)	City		Province/Federal		Expo Corporation		Total Canada		Corporate/Foreign Gov't	
	Low	High	Low	High	Low	High	Low	High	Low	High
Admissions	-	-	-	-	500	1,100	500	1,100	-	-
Sponsorships/Corporate pavillions	8	13	-	-	80	150	88	163	60	240
Foreign Government Contribution	-	-	-	-	-	-	-	-	540	2,160
Other visitor spending	-	-	-	-	200	550	200	550	-	-
Food/Beverage	-	-	-	-	100	200	100	200	-	-
Asset sales	-	-	-	-	400	500	400	500	-	-
Tax revenue	-	-	2,590	5,416	-	-	2,590	5,416	-	-
Expo Corporation surplus	-	-	80	900	-	-	-	-	-	-
<b>Total revenue</b>	<b>8</b>	<b>13</b>	<b>2,670</b>	<b>6,316</b>	<b>1,280</b>	<b>2,500</b>	<b>3,878</b>	<b>7,929</b>	<b>600</b>	<b>2,400</b>
Bid process	(10)	(15)	-	-	-	-	(10)	(15)	-	-
Pavillion construction - see Note 1	(75)	(150)	(1,500)	(2,100)	-	-	(1,575)	(2,250)	(600)	(2,400)
Pavillion Operating costs	-	-	-	-	(1,200)	(1,600)	(1,200)	(1,600)	-	-
Infrastructure	-	-	(1,250)	(5,500)	-	-	(1,250)	(5,500)	-	-
Security	-	-	(400)	(900)	-	-	(400)	(900)	-	-
Contribution of land - see Note 2	(400)	(800)	-	-	-	-	(400)	(800)	-	-
<b>Total expenses</b>	<b>(485)</b>	<b>(965)</b>	<b>(3,150)</b>	<b>(8,500)</b>	<b>(1,200)</b>	<b>(1,600)</b>	<b>(4,835)</b>	<b>(11,065)</b>	<b>(600)</b>	<b>(2,400)</b>
<b>Surplus/(deficit)</b>	<b>(477)</b>	<b>(952)</b>	<b>(480)</b>	<b>(2,184)</b>	<b>80</b>	<b>900</b>	<b>(957)</b>	<b>(3,136)</b>	<b>-</b>	<b>-</b>

Note 1 - Pavillion costs include costs paid by Canadian Governments and by Foreign Governments/corporations

Note 2 - Contribution of land is a non-cash expenditure

The table above sets out a “High” and a “Low” scenario. However, EY notes that the illustrative estimates above are highly dependent on the aims of the Expo. As such, the figures above could vary materially depending on the final scope of Expo preparations and the level of infrastructure. This is the single largest contributing factor to the quantum of spending when planning any Expo.

Key Assumptions:

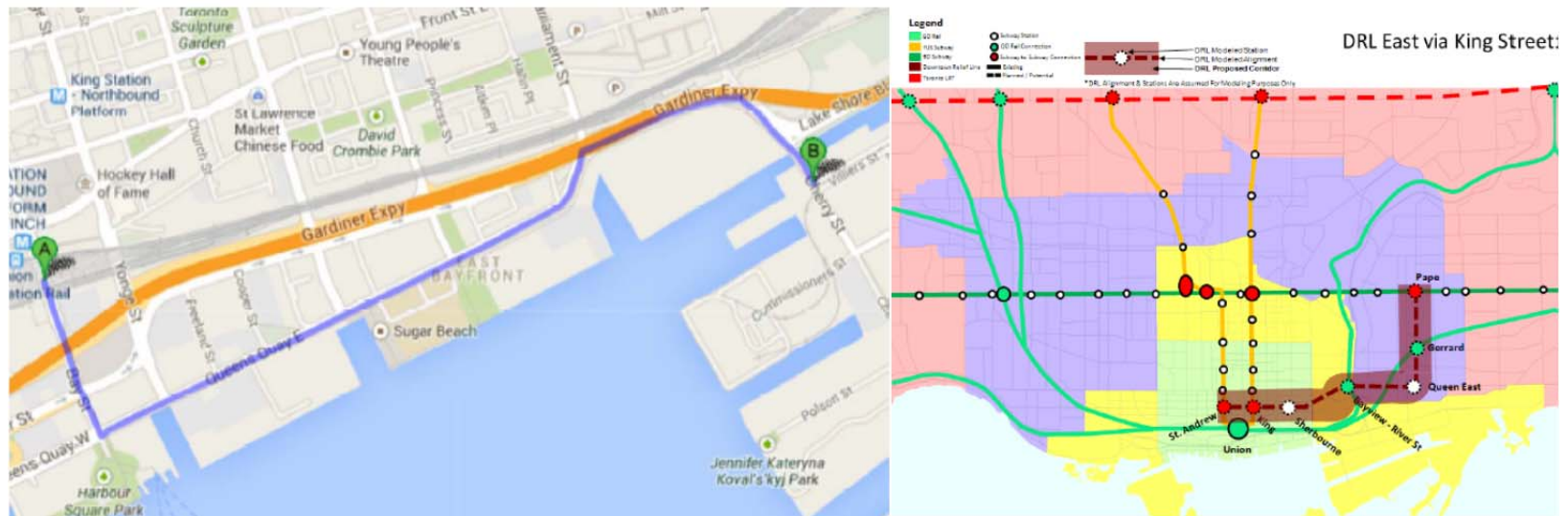
1. The Illustrative Scenario contemplates the following major items:
  - a. The Port Lands will host the Expo pavilions and related exhibition infrastructure;
  - b. A site of up to 600 acres is contemplated;
  - c. The construction of either an LRT line to Cherry Street (in the Low scenario) or the eastern leg of the Relief Line subway (in the High scenario). Such items would be required to allow large numbers of patrons to reach the Expo site; and
  - d. Remediation would need to be performed on the Port Lands site to allow for construction. Such remediation would consist of soil remediation and flood proofing. Other infrastructure, such as bridges, would likely also need to be constructed;
2. Attendance is estimated at 40 to 55 million with 15 million to 27 million unique visitors. The attendance estimate is used to estimate the operating costs and revenues;
3. The average ticket price is assumed to be \$12.50 in the Low scenario and \$20.00 in the High scenario. These are conservative averages based on prior fairs and an average price for children, adult, and family passes. We assumed no seasonal passes. The actual admission price should be subject to market studies and balance the need for revenue with the desire to draw people to the fair and tourists to the City;
4. Given the high profile of an Expo, an assumption has been made that corporations, or other bodies, will contribute sponsorship funds in the form of advertising.
5. Foreign governments will be responsible for the construction of their own pavilions at the Expo, net of any sponsorship funds that they may be able to obtain.
6. The host city is not a significant contributor of funds to any Expo process. Rather, the host will contribute a fixed amount of cash and/or land for the building of venues or other sites used during the Expo. The actual City contribution would be a matter of negotiation with the Provincial and Federal Governments. In the Illustrative Scenario above we have assumed that the City provides most of its contribution in the form of land but that limited capital spending is also made;

7. As there will be a number of events going on throughout the Expo, revenue in respect of licensing and entertainment will be earned. EY has estimated this amount based on comparable expos. The illustrative estimate assumes that each patron visiting the expo spends a limited amount in food and beverage and the same for entertainment (concerts / t-shirts /rides). Typically the Expo earns a percentage of food and beverage sales while food vendors paying a license fee to the Expo organizers earn most of the food and beverage revenue. While concert prices will likely be higher, not all fair goers will attend and certain concerts will be free to fair visitors as part of the price of admission. Further detailed analysis will be required to assess the proper pricing structure and to estimate the revenue potential;
8. The Expo will, by necessity, involve a large number of buildings being constructed and subsequently torn down. EY estimates that certain recoveries will be available on the re-sale of such buildings and land.
9. Tax revenue to provincial and federal governments has been estimated based on forecast construction and operating costs. Similarly, tourism spend and the resulting tax revenue has been estimated based on prior feasibility studies.
10. The provincial and/or federal government is typically the largest source of funds in terms of infrastructure and security spending. The capital costs can vary significantly depending on the design and vision for the Expo. The illustrative estimates above are based on reviews of past expos, past feasibility studies and Expo 2020 candidate plans. Details regarding the composition of infrastructure spending in the table above is detailed below;

Infrastructure details	Low	High
Portlands remediation	500	1,100
LRT construction	500	-
Subway construction	-	4,000
Other	250	400
<b>Total</b>	<b>1,250</b>	<b>5,500</b>

11. The illustrative infrastructure estimates assume certain remediation/servicing costs for the Port Lands based on figures provided by certain city agencies and a LRT line is built to Cherry Street and/or the eastern leg of the proposed downtown relief line. These costs are illustrative only as determination of the actual requirements and costs are outside the scope of this Expo Report and these infrastructure decisions are to be decided by the City. Approximate routings for each of the LRT and subway are detailed below;





12. The Expo Corporation is the entity through which most of the operational transactions will occur;
13. The Provincial and/or Federal Governments are typically the largest source of funds in terms of infrastructure and security spending. The capital costs can vary significantly depending on the design and vision for the Expo. The illustrative estimates above are based on reviews of past expos, past feasibility studies and Expo 2020 candidate plans. For illustrative purposes we have shown the capital costs as being funded primarily by the Federal Government and the Province and the operating costs as being funded by the Expo Corporation. It is assumed that the Province and the Federal Government provide funding and/or access to financing (for both capital and operating costs) at government rates due to their guarantee of any indebtedness. Borrowing costs are included in operating costs;
14. It is assumed that the Province and the federal Government provide funding and/or access to financing at government rates. Borrowing costs are included in administration costs;
15. It may be possible to upgrade the Metro Toronto Convention Centre or the Direct Energy Centre as part of hosting the Expo. In addition to be used for the logistics, it could be used for certain cultural, business and artistic events as well. However, it is likely that additions and/or upgrades would be required for this to occur. These costs have not been included in the infrastructure spending estimates;

16. EY estimates that the costs to complete the bid process over the next 4 years could be \$10 to \$15 million. Other Expo committees have been able to have corporate sponsors cover these costs in their entirety. Such cost recovery is a positive factor, as it demonstrates that local corporate partners may be willing participants in the Expo bid process. We have assumed that all but \$2 million are covered by sponsors.

## 2020 Candidate city budgets

The following table sets out the estimates for the Candidate cities for the 2020 World Expo:

	Dubai	Sao Paulo	Izmir	Yekaterinburg
Capital	\$5.2 billion	\$1.2 billion	\$3 billion	\$2.5 billion
Operating	\$1.3 billion	\$1.5 billion	n/a	n/a
Size	438 hectares	500 hectares	205 hectares	500 hectares
Attendance estimate	25 million	30 million	n/a	12 million
City size	2.1 million	11 million	4 million	1.4 million

Note: Yekaterinburg plans to spend \$15 to \$30 billion on infrastructure and Izmir has announced plans of \$3 billion.

The table above includes both those expenditures incurred by the relevant Expo Corporation and those expenditures financed by public funds (generally municipal, state, provincial or federal governments). Furthermore, such disbursements would be offset by a number of revenue items. As noted elsewhere in this Expo Report, cities wishing to host the Expo are required to submit a detailed “bid dossier” so that the BIE may evaluate each cities’ plans for the Expo. We were not able to obtain the financial aspects of the bid dossiers for this Expo Report, but instead were able to prepare the figures above from various news releases and government reports.

It should be noted that the revenues and expenses noted above are forecast only and may be subject to significant variation which, given the length of time before the Expo, is likely that there will be significant change to the amounts forecast above. It should also be noted that the level and form of financial disclosure varies among the candidate cities. Further analysis and discussions with these bid committees would be recommended as a next step.





## Summary of financial impact

Based on the chart above, EY makes the following observations:

- ▶ The City's primary contribution to the Expo is that of land in the chosen site. Cash contributions are more limited;
- ▶ The federal and provincial governments, as the source of the majority of infrastructure funds, will have the greatest cash outlays. However, a portion of such outlays will be returned to them via tax revenues. EY notes that a more transformational Expo will have a greater contribution of tax revenue due to the increased spending associated therewith;
- ▶ The chart above assumes that either an LRT or subway line will be built to service the Port Lands. This type of infrastructure will have lasting benefits to City residents for decades to come;
- ▶ Even though the Expo is a single site, security costs will still be significant. This is due to a number of factors including the length of the Expo (6 months) and the fact that numerous heads of state will likely visit the City during the Expo. Such visits will require substantial security personnel and investment.
- ▶ It is possible that the Expo Corporation will run a profit during the Expo. Any profit would likely be turned over to the provincial and federal government as a way for them to recoup infrastructure investments. It is not uncommon for such surpluses to be realized, although this is far from certain.
- ▶ Foreign governments will be responsible for the staffing and construction of their own pavilions during the Expo.

# Economic Impact

The hosting of the Expo in Toronto would have a wide range of financial and economic impacts on the City, including:

- ▶ Additional revenue to the City in the form of development charges and property taxes;
- ▶ Incremental growth in the City's GDP arising from the construction and the ongoing operation of the legacy Expo sites;
- ▶ Creation of new employment during the construction and ongoing operation of the Expo; and
- ▶ Increased value of Port Lands or other site used for Expo.

## Methodology

As described in the Limitations Section, the statement of work for this engagement specifically precluded original research or detailed economic modeling. As such, we undertook a review of other feasibility studies for prior Expo bids as well as a review of literature related to expos and discussions with individuals who have experience in preparing Expo bids.

We used this information to produce our estimates by carefully reviewing the available studies on the economic impact of past expositions. We also focussed our attention and efforts on the more recent studies, especially the feasibility study in prepared in 2005 for a possible Toronto bid for the World Expo in 2015 as well as the peer review by ERA and the comments prepared by Heritage Canada with respect to the feasibility study.

Based on this review and our experience in preparing economic impact studies, we adopted essentially the same input-output based estimation methodology that was common to all the studies that we reviewed.

We determined that the impact results of most of the studies fell within a reasonable range, once adjusted for differences in spending and for inflation. By comparing the results of the various studies we developed an estimate for the appropriate multiplier to be applied to the anticipated level of spending in order to calculate the impact on GDP, from which we derive the resulting impacts on employment and tax revenue. In this process we also reviewed and incorporated the data on the most recent industry output multiplier estimates available for Ontario from Statistics Canada and discussions of tax multipliers with Ontario Ministry of Finance.

This methodology was used in preparing an economic impact model (they "**Economic Impact Model**"). To generate estimates of the financial and economic impacts, the Economic Impact Model incorporates numerous assumptions regarding the hosting of the Expo. These key inputs include:

- ▶ Location - a single site that to which it is easy to travel;
- ▶ Configuration of Expo - laid out in a way that makes it easy for visitors to get around;
- ▶ Size and construction costs of Expos sites - as detailed in the Illustrative Scenario;
- ▶ Tourism impacts - consistent with other feasibility studies on other Expos; and
- ▶ Capital investments - as detailed in the Illustrative Scenario.

Our Illustrative Scenario, as described earlier in this Expo Report, is one possible scenario of many with a specific set of assumptions and is not intended to be the single forecast of the potential financial and economic impacts. Analysis of the financial and economic impacts is complex and the resulting estimates are necessarily subject to many uncertainties. To give a sense of the possible range of the order of magnitude of these impacts, we have created a low and high scenario using assumptions we believe to be reasonable based on our discussions with parties with past experience in hosting mega events and others. This Illustrative Scenario has been used to prepare the estimates of GDP, employment and tax revenue contained herein.

## Employment levels and GDP creation during the Expo

Based on the spending estimates in our Illustrative Scenario, we have used an input-output multiplier approach to derive estimates of the impact of this spending on GDP and employment. We identify separately the impacts that result from the spending on the construction of the facilities and associated infrastructure, the operations of the Expo, and from the spending by tourists to Toronto outside of the Expo (since the impact of tourist spending at the Expo is captured in the activity of operating the Expo). Our GDP and employment estimates are summarized in the following tables. Note that these estimates are cumulative over the 7-8 year period that is anticipated to plan, construct and operate the Expo.

GDP in \$Millions	Low	High
Construction	3,151	9,338
Operations	1,562	2,440
Tourism	2,688	3,696
<b>Total</b>	<b>7,401</b>	<b>15,474</b>

Jobs created	Low	High
Construction	37,470	111,041
Operations	20,705	32,343
Tourism	33,810	46,489
<b>Total</b>	<b>91,984</b>	<b>189,873</b>

It is evident from the tables that there is a very wide range of possible impacts, depending on the scope of the Expo. A more transformational Expo, with its higher levels of spending, will have a greater impact on GDP and employment. Note also that it is not possible to say at this juncture how much of the impact that is associated with infrastructure enhancement should be attributed to the Expo, since some of this spending might have taken place in the absence of this initiative, albeit on a different timeline.

## City revenue during the Expo

The amount of revenue that may accrue to the City is difficult to assess without specifics around what venues are to be built or the ownership structure for each.

In discussion with City staff, it was determined that any for-profit entity owning any of the venues related to the Expo would be taxed at the normal commercial rate, provided that they were not registered charities. However, if venues were owned by not-for-profit entities and were registered as charities, such property tax revenue would not accrue to the City.

Bearing the above factors in mind and assuming that most of the venues will be transferred to not-for-profit entities which are registered charities as part of the Expo legacy, it seems unlikely that significant revenue will accrue to the City. On the other hand, it seems likely that, if the City were to ultimately become the owner of many of the venues, that costs to maintain such venues will be incurred instead. However, EY reiterates that it is very difficult to assess the impact of these venues without knowing the exact ownership and use of each. The chart below provides illustrative examples of assessed values and the resulting property tax levels accruing to the City. Further analysis should be done in the next steps to quantify increased land value and the potential related tax revenues.

\$ millions	Low			High		
	Assessed value	Rate	Property tax revenue	Assessed value	Rate	Property tax revenue
Residential	2,000	0.53%	11	3,000	0.53%	16
Registered charties	500	0.00%	-	1,000	0.00%	-
<b>Total</b>			<b>11</b>			<b>16</b>

The revenue above is illustrative only and may be realized even without the Expo. The City is currently attempting to develop areas of the City that could be used as Expo sites. As such, property tax revenue will ultimately be earned when the properties are developed. As such, some of all of the revenue may be generated without the City hosting the Expo. However, the Expo would likely accelerate any development and, as a result, allow the City to earn property tax revenue more quickly than it might otherwise be able to achieve.

### Provincial/federal government revenue generated through hosting the Expo

To derive our estimates of the total (direct and indirect) tax revenue that each level of government could receive as a result of Toronto hosting the Expo we applied historical relationships between incremental GDP and government revenue. Based on these relationships we expect that the incremental GDP impact of between \$7.4 billion and \$15.5 billion may result in incremental tax revenue of between \$2.6 billion and \$5.4 billion. This would be split between the levels of government, by source, as shown in the table below.

Tax revenue in \$ Millions	Low	High
Federal	1,480	3,095
Provincial	1,110	2,321
<b>Total</b>	<b>2,590</b>	<b>5,416</b>

These estimates include taxes from all sources, including:

- ▶ Personal and corporate income taxes;
- ▶ Excise taxes; and
- ▶ Value added taxes such as the HST.



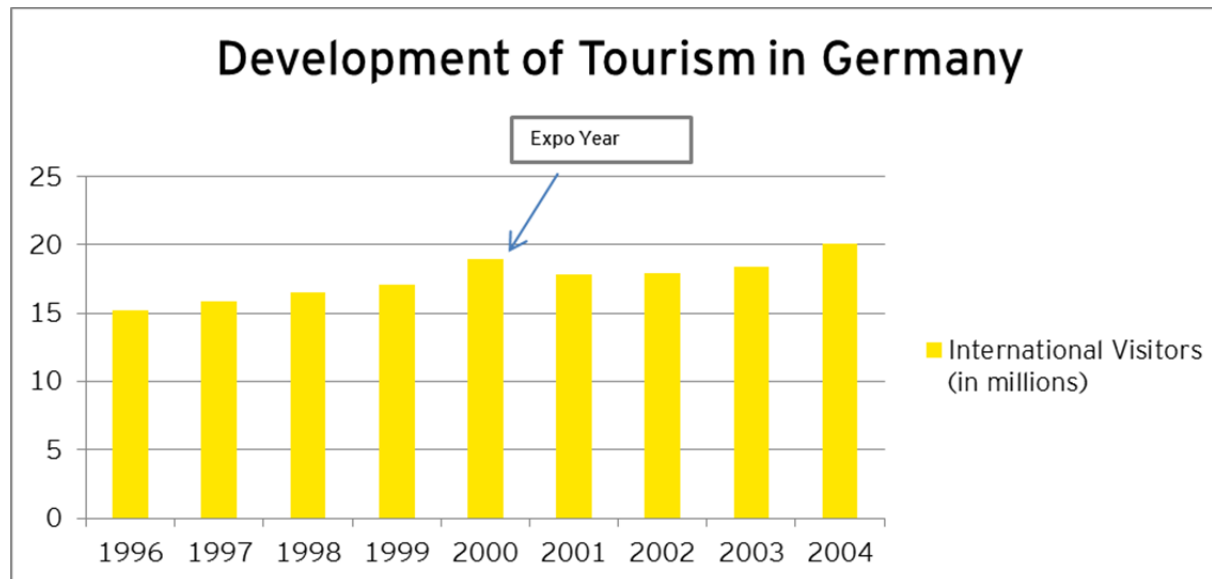
## Long Term Tourism Impact

## Expo impact on trade, investment and tourism

We have received a number of studies with respect to the impact of large events on the long term tourism impact on cities which hosted World Expos or Olympic Games, as well as a review of tourism data for countries which held World Expos and/or Olympic Games to determine where there is a correlation between the holding of these events and long term tourism on a city.

It is apparent that there is no clear correlation between these mega events and long term tourism impacts. The tourism data which we have reviewed indicated moderate increases in tourism after these mega events; however, there is insufficient data to assert a correlation between these increases and the mega event. Further analysis will be required including interviews with the tourism bureaus in host cities, reviews of hotel room occupancy data as correlated with local economic conditions to provide a basis on one side or the other.

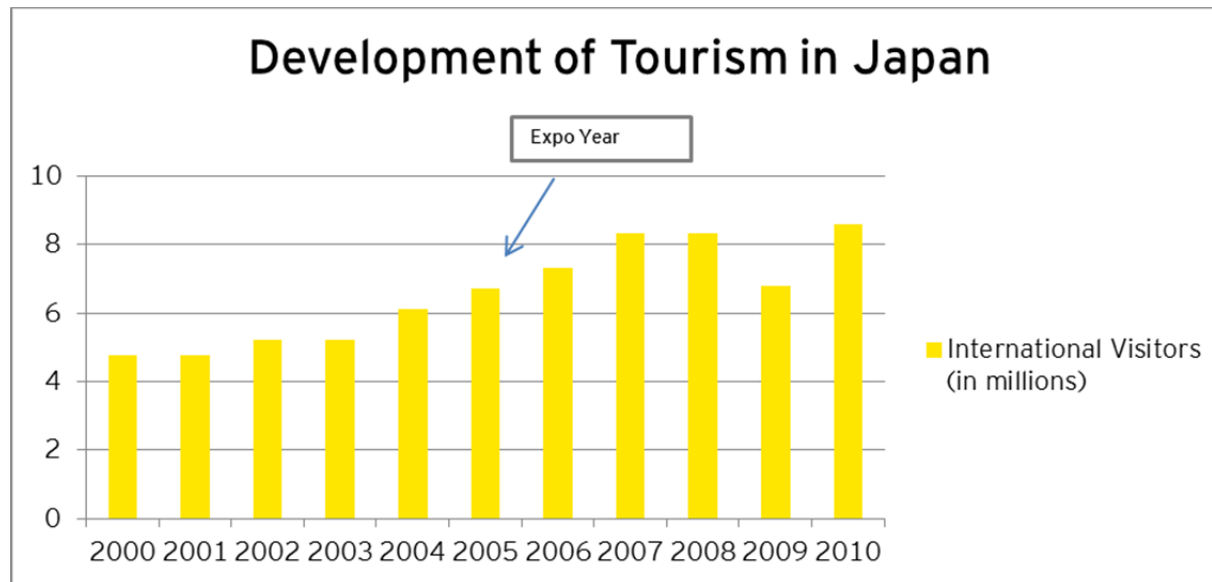
In order to estimate the potential benefits to the City post-expo, we have compared tourism for a number of cities that hosted an Expo. The results of this analysis for Aichi and Hannover are summarized below. EY attempted to locate information in respect of Seville, Spain, but was unable to find reliable tourism data. As such, more work should be done in this area. Similarly, Shanghai was a fairly recent Expo and any tourism impact may not yet be evident so this city was excluded from the charts below:





Hannover held the Expo in 2000. Based on the information on the table above it does not appear that there was a significant increase in tourism as a result of Hannover hosting the World Expo in 2000, although there has been a minor increase since the Expo was held. This could, however, simply be due to the broader world economy, which is a main driver of tourism. It could also be indicative of the low attendance figures for the Hannover expo. Also, given Germany's location within the Eurozone, it is difficult to estimate the number of visitors crossing Germany's borders.

The chart below details tourism in Japan for the Aichi Expo.



Aichi held the Expo in 2005. As set out in the table above there was a significant increase in tourism in Japan after Aichi held the World Expo in 2005 of approximately 25%. However, it is not clear whether this increase was as a result of the World Expo being held in Aichi, as city level information was not available.

Based on the data above, it does not appear that there has been significant increase in tourism after hosting the Expo. However, there are a large number of factors that would be influencing tourism visits, so it is difficult to assess what other factors may have depressed tourism against a potential increase as a result of hosting the Expo.

A number of other factors should be considered when considering tourism impacts of hosting the Expo. These include, but are not limited to, the following:

- ▶ The strength of the worldwide economy has a significant impact on overall tourism dollars and is a large driver of overall tourism numbers;
- ▶ Exchange rates are a major factor in the affordability of travelling to any country. In Canada's case, the Canadian dollar has been relatively strong over the last several years, negatively impacting tourism spend in Canada. Attempting to forecast foreign exchange levels in 2025 is next to impossible so it is difficult to assess the situation that will exist at that time;
- ▶ Trade an investment would likely be enhanced as part of hosting the Expo. It is likely that a number of trade missions or conferences would be held in the City during the 6 months of the Expo (and possibly ahead and after the event) and, as such, would enhance the City's and Canada's standing internationally. The degree to which this could occur is difficult to assess, however, and any such activities would need to be carefully organized to ensure maximum returns;
- ▶ It is likely that there would be increased tourism to the City during the Expo and possibly ahead and after the event as well; and
- ▶ Geopolitical concerns also play into tourism decisions of travelers. As such, it is difficult to determine what impact such a factor would have on tourism in a host city.

## Potential Sites for World Expo

## Identification of Potential Sites

### Overview

The best site for a world's fair would be: beautiful, visible, associated with water, easy to get to, available, the right size, well serviced, and developing it would have a positive impact on the existing and future environment. It would leave valuable legacies after the Expo closes. A consolidated, contiguous site area without too many fixed impediments is desirable to allow visitors to move freely and efficiently within the gates of the Expo. Ideally, the site would have parkland that is located within or adjacent to the Expo gates and is accessible to Expo visitors.

For a given site, the existing contextual assets such as a city skyline or a waterfront view enhance a proposal because these qualities already exist. This is especially valuable during the time the Fair is open when these characteristics will comment by the media and generate word-of-mouth recommendations by visitors. The goal would be to ensure high attendance and to put Toronto and Canada 'on the map'. Close proximity to other exciting venues and urban attractions would provide context and depth to the entire visitor experience.

The fair should be used as a catalyst to support and accelerate planned development and raise the profile - and in most cases also the value - of the land.

The attendance estimate of 40 million to 55 million over the 180 day period of the Expo would imply an average day attendance of approximately 220,000 to 300,000 persons. Most transport facilities should be designed to accommodate the design day attendance of 0.7 percent of the total attendance representing about an 80th percentile attendance day of approximately 80,000 persons. The maximum accumulation of persons within the gates of the world's fair at the mid-day would be approximately 60 percent of the daily attendance, or approximately 132,000 to 180,000 persons on the design day.

Approximately 36 days would have attendance levels equal to or greater than the design day. Of these, approximately 18 would be weekend days (Saturday or Sunday), approximately 4 would be statutory holidays and the remaining 14 would be weekdays. Almost all of the most heavily attended weekdays would be in July, August and September.

The heaviest period of travel demand generated by the world's fair at the site would be at the mid-morning (10AM to 11AM) when there would be a pronounced surge of entry to the site and in the late evening (10PM to 11PM) when there would be a correspondingly pronounced surge of exit from the site. These surges would each represent 20 percent of the daily attendance -- or approximately 40,000 to 60,000.

For comparison purposes, it could be noted that in Toronto a crush-loaded subway line operating at its maximum efficiency can be expected to carry close to 40,000 people per hour in one direction. A streetcar line can carry approximately 8,000 people per hour in one direction. A major bus route with fully loaded bus every minute can carry 3,000 passengers per hour. One can see the scope of the challenge involved in meeting the travel demands of a major world's fair. Each day would represent a major challenge and each day would require extensive planning and operational management on the part of the Expo Corporation in partnership with the responsible transportation operating authorities. However, this issue may be mitigated by designed tickets to direct transit demands to off-peak periods.

The fact that the World's Fair would have duration of six months significantly differentiates this event from other high attendance events of only a single day's duration, such as World Youth Day or the SARS concert. These were accommodated by implementing special operational provisions (such as road closures and special transit passes) which, although tolerable by the community for one day or a weekend, would not be acceptable for a period of six months. Even a major event like Toronto's bid for the 2008 Olympics, which would (if the bid been successful) have had a duration of three weeks, could have been accommodated primarily by low cost capital measures and effective operational measures (such as parking restrictions, special lane designations and priority transit services). Such measures could be very problematic if required for a six month period. In that respect, a world's fair is a somewhat greater challenge. In other cities the solutions have often involved a mix of significant infrastructure and operational responses. World's fair transportation solutions are usually more heavily weighted toward the implementation of new permanent transportation infrastructure than is typically the case with other heavy attendance events of a shorter duration.

These sites are large in order to accommodate expected high attendance. For Toronto 2025 this would be on the order of 40 to 55 million visits over 6 months, requiring a site of around 300 to 600 acres in total (the breakdown of this area is described later in this section), containing a large number of pavilions and attractions.

Based on experience at previous fairs the average visitor spends about two to three days on the site. This places a premium on designing a site which has a 'readable' layout; where visitors can easily find their way around without the frustration and discomfort of getting lost.

In building the fair there is continuing uncertainty, particularly with the national participants, right up to opening day. There is uncertainty as to the number of pavilions; some may withdraw or be added at the last minute; and some may want to increase or decrease the size of their allotted space. This requires that the site plan be flexible enough to accept change without losing its integrity.

One way to meet these challenges is with a 'structure' or skeleton plan which is fleshed out by the invited participants. The elements of the structure plan are those over which the Expo organizing body has direct control. They include:

- ▶ an integrated hierarchy of movement systems within the site, from mechanical systems to minor pedestrian paths, serving all parts of the site. The top order of the hierarchy should give first time visitors a quick and comprehensive overview of the site;
- ▶ one or more landmark or iconic structures, preferably visible from all parts of the site, which allow visitors to orient themselves and find their way;
- ▶ the major pavilions or attractions (major traffic generators) need to be located in such a way as to distribute visitors throughout the site and to draw them past the smaller pavilions;
- ▶ multiple entry gates in order to avoid crowd problems, particularly at peak entry and departure times;
- ▶ creation of land (and water) forms which enhance "imageability" and allow for flexibility in allocation and adjustment of pavilion sites; and
- ▶ integrated design of common elements such as street furniture, sign systems, and services to visitors (covered rest areas, washrooms, and information, food and souvenir facilities).

The size of site that is required has been determined from attendance estimates. A site area of approximately 200 to 400 acres be required inside the gates, as well as 100 to 200 acres or more outside the gates for ancillary and transportation uses, for a total of approximately 300 to 600. Additional area, if available, could be used for an amusement park or parkland inside the Expo.

The best site would be located in an area where existing neighbourhoods would not be unduly disrupted. Existing transit and road infrastructure will need to remain usable for normal operations and must therefore be enhanced or ideally supplemented by separate, purpose built, systems for the event which would then remain to facilitate future community development. Surrounding built form such as light industrial or warehousing is also desirable to support ancillary functions of the expo.

## Site Evaluation Criteria

The criteria that a good exhibition site (maps of potential sites in the City are in Appendix "H") must meet are listed below. Few sites can meet all the criteria (as judged by the BIE in its evaluation process) and most often there must be compromises in one or another area. An example would be a waterfront site, which satisfies one criterion, but which is often long and narrow (a less desirable configuration), at the expense of another. These include:

### Political Support

- ▶ Stakeholder Support
- ▶ Compatibility with Official and other agency plans

### Land Ownership

- ▶ Ownership and Assembly (ease and cost of assembly: proportion public/private ownership)
- ▶ Compatibility with owner's plans and commitments

### Access

- ▶ Transit access, road access, gate entries, parking, etc.

### Site Conditions

- ▶ Useful acreage related to attendance space need
- ▶ Efficiency of configuration (compactness)
- ▶ Effect of fixed impediments
- ▶ Amount of remedial action needed (pollution etc.)
- ▶ Visibility from surrounding routes
- ▶ Views from the site
- ▶ Attractiveness of the site (vegetation, water features)

### Surrounding Conditions

- ▶ Proximity to support facilities (hotels, hospitals)
- ▶ Proximity to recreation and entertainment

Legacies and Residuals

- ▶ Value of site remediation to future uses
- ▶ Value of site servicing, landscape etc. to future uses
- ▶ Value of transportation improvements
- ▶ Potential to advance objectives of current plans
- ▶ Potential for permanent iconic structures, e.g. museum

**City land suitable for the World Expo**

Given the amount of land that is necessary for the Expo, there are a limited number of City-owned parcels that would be suitable for hosting the Expo. In carrying out our work, we have made the following assumptions:

- ▶ The Expo must be in one contiguous site in accordance with BIE guidelines according to the stakeholders EY has consulted. Past fairs have been on multiple sites with little success;
- ▶ The Expo site can be a smaller expo 250 acres or in larger site in 600 acre range.
- ▶ Warehousing / staging can be off site

Based on discussions with relevant stakeholders, we have identified the following locations that may be suitable to hold the Expo. These include, along with pros and cons of each, the following:

Woodbine Racetrack Centre	
Pros	Cons
<ul style="list-style-type: none"> <li>▶ Large undeveloped area within the City</li> <li>▶ Large footprint of land could be used for a number of events</li> <li>▶ Good access to highways as Highway 427 is nearby</li> <li>▶ Close to Pearson International Airport and secondary hotel hub</li> </ul>	<ul style="list-style-type: none"> <li>▶ Limited transit links, although a spur from the airport link could be built</li> <li>▶ Not owned by the City</li> <li>▶ Expo may not be consistent with the owner’s plans for development</li> <li>▶ Not on Waterfront and does not show off Toronto</li> <li>▶ Cost to purchase or lease land may be prohibitive</li> </ul>





Downsview	
Pros	Cons
<ul style="list-style-type: none"> <li>▶ Large enough footprint to house Expo</li> <li>▶ Currently underdeveloped and could use the Expo as a catalyst</li> <li>▶ Good access to highways, subway and airport</li> </ul>	<ul style="list-style-type: none"> <li>▶ Land not all owned by the City</li> <li>▶ Height restrictions as a result of the airport at Downsview</li> <li>▶ Not close to downtown and few hotels in the area</li> <li>▶ Cost to lease or purchase expo lands would be cost prohibitive.</li> <li>▶ Configuration of usable land not conducive to expos</li> </ul>

Exhibition Place / Ontario Place	
Pros	Cons
<ul style="list-style-type: none"> <li>▶ Close to downtown and hotels</li> <li>▶ Large footprint of land could be used for smaller expo</li> <li>▶ Could spur redevelopment of Ontario Place and Exhibition Place</li> <li>▶ Could spur development of projects and spur growth in area of the City</li> </ul>	<ul style="list-style-type: none"> <li>▶ Several buildings are listed as heritage sites and special consideration may need to be given to them</li> <li>▶ No significant mass transit connections although an upgrade to the current Exhibition GO station may assist in this regard</li> <li>▶ The future of Ontario Place is currently uncertain and MTCS not going to wait until 2017 when expo decision is made</li> </ul>

The Port Lands	
Pros	Cons
<ul style="list-style-type: none"> <li>▶ Large enough footprint to house the World Expo site</li> <li>▶ Currently underdeveloped and could use the Expo as a catalyst</li> <li>▶ Potentially a very picturesque view of the City if redevelopment were to occur</li> <li>▶ Disruption to the rest of the City could be contained in one area</li> <li>▶ Security costs could be minimized if the site can be isolated from the city and the Island airport can be used</li> <li>▶ Close to downtown and major hotels</li> <li>▶ City owns large portions of the Port Lands</li> <li>▶ Could spur transit infrastructure would need planned LRT or downtown relief line to get to site</li> </ul>	<ul style="list-style-type: none"> <li>▶ Geographically isolated with few current transit links</li> <li>▶ Access could be problematic with current road network</li> <li>▶ There may be flood proofing issues, but EY notes this area was not impacted by flooding as a result of the July 2013 “super storm”</li> <li>▶ Flood protection, remediation and servicing is estimated to cost in excess of \$1.1 billion by certain city agencies but this number has not been refreshed to take into account necessary planning to hold the Expo</li> <li>▶ What is to be done with the venues once the Expo is complete and does that fit with the City’s current plan for the area?</li> </ul>

Based on the factors above, the Port Lands is likely the best site for the main Expo cluster of venues. For purposes of the illustrative scenario, the Port Lands is assumed to be the site selected by the City. The reason for this is as follows:

- ▶ The BIE would likely look favourably on the fact that a contaminated area is being remediated and brought into the City;
- ▶ The location is very favourable, as it is on the waterfront, a very desirable location from an BIE perspective;
- ▶ Many of the key venues are within close proximity to the site; and
- ▶ Expo will spur development in Port Lands by getting land ready for development and will dramatically increase value of land from approximately \$1.5 million per acre (from MPAC assessment) to \$5 to \$10 million per acre for remediated and serviced land, post-Expo.



## World Expo Legacy Considerations / Reasons to Bid

## Legacy impacts

### Trade and investment

As part of any Expo, there will likely be a number of related trade shows and other conventions held in the City. Similarly, it is likely that Canadian companies would be exhibitors at the Expo site itself. If both factors were leveraged to their fullest, it is likely that Canadian companies and technology would be exposed to a world-wide audience. This, in turn, could drive foreign investment and exports of Canadian goods and services.

The degree to which this has happened as a result of other World Expos is difficult to assess without doing significant economic analysis beyond the scope of this Expo Report.

### Conferences and conventions

Central to any city's ability to attract convention or conference business is the infrastructure required for this type of visitor. Although Toronto has a well-known convention centre that is used for large scale events throughout the year, it is not as large as other major convention centres in North America. As an example, the Metro Toronto Convention Centre is approximately 600,000ft<sup>2</sup>. In comparison, the Orange County Convention Centre in Orlando, Florida (the top convention destination in the United States) has approximately 7,000,000ft<sup>2</sup> of convention space.

It is possible that, as a result of the Expo being held, other orders of government or private sponsors could be called upon to assist the Metro Toronto Convention Centre in expanding its space offerings in the City. Such an expansion occurred in Vancouver as a result of that city holding the Olympic Winter Games in 2010. It is also possible that, with an expanded MTCC, certain cultural and business meetings could be held at the site.

In addition, the Expo would provide additional name recognition for the City, which would only increase the opportunity of significant conventions or conferences taking place in the City.

### Environment and environmental sustainability

Environmental concerns have become increasingly important in the last several decades and environmental sustainability has become a significant planning point in any major event. The environmental sustainability of the Expo could be a catalyst for further development in the City. This would be especially noteworthy if the Expo were held in the Port Lands, an environmentally contaminated "brownfield" site.

Provided that environmental sustainability is of sufficiently high profile during the planning of the Expo, it has the potential to show the rest of the City what can be done and still maintain a good balance between cost and environmental sustainability.

Potential items could include the following:

- ▶ Powering the Expo using renewable energy;
- ▶ Ensuring that waste is dealt with in a sustainable way; and
- ▶ Spacing venues such that fossil fuel consumption is kept to a minimum.
- ▶ Recommendation of Port Lands site

Such an environmental focus would almost certainly be appealing to the IOC. In fact, it is increasingly likely that such attention to environmental concerns would be a must have, rather than being a “nice to have”.

### **Transit and transportation**

If the Expo are to be held in an area of the City such as the Port Lands, no such rapid transit exists. As such, the Expo could be an opportunity to expand the networks currently operated by the Toronto Transit Commission and Metrolinx. However, any such expansion would need to be planned in conjunction with the ultimate owner of the infrastructure to ensure that it is planned in connection with existing or planned lines/routes.

In working with City staff, it has been estimated that an LRT line to the Port Lands would cost approximately \$500 million to Cherry Street. While this configuration would certainly need to be reconfigured to incorporate an Expo site, it represents a reasonable estimate to link this part of the City to the broader transit network. A further \$3.5 billion would likely be required to fund a segment of the Relief Line subway.

Such expansion has significant precedent. Many of the recent Expos involved significant transit infrastructure upgrades (the Canada Line in Vancouver and the Sea to Sky Highway and numerous upgrades in Shanghai) and it is now expected by many that such projects be undertaken in conjunction with a bid for the Expo.

## **Arts and culture**

The City has a robust arts and culture landscape absent the Expo. However, part of any Expo is the related cultural activities. This could include concerts, theatre performances or other functions. If the City desired to continue with this type of activity, it could reinforce Toronto as a major arts and culture hub in both Canada and around the World.

Given Toronto's multicultural make-up, it is possible to plan the Expo such that there is a significant focus on worldwide arts and culture. Similar events have been held at other Expos, and such a program could easily be incorporated into planning for 2024.

## **Research, high tech and innovation**

As a major global event, the Expo would have the effect of showcasing the City around the world. This could be leveraged to show "made in Canada" technology or know-how, provided it was planned for from the outset. To that end, it should be made a goal of any bid to provide for such an opportunity. This could be coordinated with environmental sustainability.

## **Affordable housing, social and community improvements**

The major goal of any Expo is to leave a lasting legacy for the host city. One way this can be accomplished is to re-purpose facilities used during the Expo into more lasting assets for the host city. Examples of this include the following:

- ▶ Using the accommodation for foreign pavilion hosts as low income housing to be managed by an agency of the City;
- ▶ Assuming management of legacy pavilions to be used by the community or to build tourist attractions such as the biodome in Montreal; and
- ▶ Working with major sponsors to set up legacy funds to be used by the City in the long term.

## **Expansion of Toronto's tourism base**

There is perhaps no better showcase of a City than the World Expo. While there is little television coverage, the large number of attendees build word of mouth "buzz" about the City. It is possible, with the right planning, to leverage this into higher tourism figures. However, as the graphs on pages 49 and 50 indicate, it is not a given that tourism will increase substantially after any Expo. In order for this to be accomplished, careful marketing of the City must be undertaken and any efforts must be customized to draw in the maximum amount of tourists.

It has also been reported that during the Expo tourism will often fall, as non- Expo visitors do not visit the host city due to overcrowding and pricing concerns. This factor, with proper consideration, will need to be overcome if the City wishes to avoid a tourist shortfall.

### **Ways to maximize legacy**

As noted elsewhere in this Expo Report, a main feature of hosting any Expo is the legacy that is left behind. In order to maximize legacy impacts of the Expo, the following should be considered:

- ▶ Ensure that legacy is a major component of any bid to ensure that it maintains sufficient visibility after the Expo have finished;
- ▶ Funding for legacy items should be a prominent line item in any bid forecast to ensure that the necessary funds are available post- Expo;
- ▶ Appropriate management structures must be put in place to ensure that legacy items are addressed once the Expo are complete;
- ▶ Firm, concrete targets should be established, where appropriate. This will allow the City to objectively measure the success of legacy programs;
- ▶ The community should be consulted to ensure that appropriate legacy items are included in any Expo planning;

### **Other**

- ▶ Planning of the Expo will allow Toronto to develop links with other cities around the world
- ▶ Demonstration Toronto's ability to host the world

## Next steps



## Next steps

In accordance with the scope of work in Appendix “A”, EY has prepared the following in respect of a potential next phase of analysis to be undertaken by the City. We estimate the time to complete this work to be 3 to 6 months and anticipate a budget of \$350,000 to \$400,000. Work of this nature would allow the City to approach other orders of government to gauge their support in hosting an Expo:

Scope of Services	Key Activities
(a) Engagement management;	<ul style="list-style-type: none"><li>▶ Meet with City staff to confirm scope and deliverables.</li><li>▶ Assign responsibility to consultant and City staff for given tasks.</li><li>▶ Determine appropriate schedule for process update meetings.</li><li>▶ Review information provided by City staff.</li><li>▶ Determine the location of the major Expo venues.</li><li>▶ Determine extent of City’s financial and operational involvement with the Expo.</li></ul>

Scope of Services	Key Activities
(b) Conduct a detailed socioeconomic impact study;	<ul style="list-style-type: none"><li>▶ Determine detailed construction and operating spending estimates. As part of this work, consider the extent to which impacts of improved transit and infrastructure spending in the GTA and elsewhere are to be included.</li><li>▶ Estimate incremental tourism spending.</li><li>▶ Create economic impact assessment framework by combining static simulation results from Statistics Canada input-output models and dynamic simulation results from econometric model simulations.<ul style="list-style-type: none"><li>○ Estimate direct, indirect and induced impacts on GDP and employment for the City, GTA and Ontario. To the extent that the methodology permits, estimate the approximate number of jobs for key industries, such as construction, manufacturing and services. Estimate average wage levels associated with the jobs created.</li></ul></li><li>▶ Estimate effective tax rates by level of government.</li><li>▶ Apply effective tax rates to estimate tax by level of government.</li><li>▶ Provide additional details on the estimates for City revenues. In particular, comment on:<ul style="list-style-type: none"><li>○ Changes in property tax assessments on the venues site and associated businesses/properties;</li><li>○ Rent, lease or other income from city owned lands if used for the World Expo;</li><li>○ Equity returns if city lands are used as an equity contribution to a private project;</li><li>○ Economic returns to the federal, provincial and municipal treasuries, including those that may be negotiated with the provincial and federal governments, including funding to repair and maintain Toronto Community Housing.</li></ul></li><li>▶ Review and confirm estimation results with other orders of government for reasonability.</li></ul>



Scope of Services	Key Activities
(c) Engage the community and other levels of government;	<ul style="list-style-type: none"><li>▶ Determine the nature of public forums to be undertaken.</li><li>▶ Prepare information briefings for public.</li><li>▶ Ensure that the chosen forum allows for input of a wide range of stakeholders.</li><li>▶ Discuss the potential bid with community groups that have expressed opposition to similar events in the past.</li><li>▶ Determine strategies to mitigate or address opposition.</li><li>▶ After incorporating comments, gauge level of interest/opposition to the proposed bid.</li><li>▶ Use of online surveys and polling and other multi media to gauge public interest and support;</li><li>▶ Consider public opinion polls by ward.</li><li>▶ Consider if opposition could be fatal to a potential bid.</li><li>▶ Determine what information the other orders of government may require before agreeing to participate in a bid.</li><li>▶ Begin the process of selling the Expo to other orders of government and determine if they are supportive of a bid put forth by the City.</li></ul>

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Scope of Services	Key Activities
(d) Determine the municipal infrastructure that will be necessary to support the Expo.	<ul style="list-style-type: none"><li>▶ Estimate the population of the Expo area after the Expo are complete.</li><li>▶ Determine what mode of transit will be used to transport people to the Expo and what the volume of people will be each day.</li><li>▶ Work with TTC, Metrolinx, City Planning department, and City Transportation department to estimate the cost of installing and operating such transit links.</li><li>▶ Consider alternatives, weighing costs and benefits and economic impact.</li><li>▶ Based on Expo and post-Expo plans, determine what site servicing will be required and estimate the cost and time to install it.</li><li>▶ Perform sensitivity analysis to assess a range of possible funding required.</li><li>▶ Consider availability of funding</li></ul>

Scope of Services	Key Activities
(e) Preparation of business plan	<ul style="list-style-type: none"><li>▶ Determine who will lead the bid and what team will be required.</li><li>▶ Determine what funding will be required and the source of such funding.</li><li>▶ Estimate revenue sources based on previous Expo and an outlook into the future, taking into account any trends that have recently emerged.</li><li>▶ Build a cash flow forecast based on prior bids and incorporating new information, including the aspirations of the Expo to be held.</li><li>▶ Assess whether the funding required is acceptable to other orders of government. Discuss alternate funding sources, if necessary.</li><li>▶ Determine financing costs and financing structures to be used for larger capital projects including P3 financing models such as DBFOM, DBFM and DBF and DBB and DB.</li></ul>

Scope of Services	Key Activities
(f) Perform an analysis of tourism information to determine if there is any lasting impact	<ul style="list-style-type: none"> <li>▶ Obtain the necessary tourism data from other Expo cities.</li> <li>▶ Interview local tourism officials in host cities and review data from pre and post Expo.</li> <li>▶ Discuss Expo tourism literature with authors where available.</li> <li>▶ Confirm methodologies and scope.</li> <li>▶ Assess draft findings against other results.</li> </ul>
(g) Identify legacies of the Expo and ways to achieve them;	<ul style="list-style-type: none"> <li>▶ Prepare prelim cost estimates for legacy items</li> <li>▶ Determine what legacy items have been achieved in other Expo cities</li> <li>▶ Determine desired legacy impacts in consultation with community</li> <li>▶ Determine which legacy impacts require the assistance of third parties and develop strategies to engage such parties.</li> <li>▶ Through meetings with stakeholders and member of prior Expo bid committees prepare a Toronto legacy working paper.</li> </ul>
(h) Information with respect to other City-regions and nations expected to bid for the 2025 World Expo, including comments on the "unofficial continental rotation policy" for awarding international events;	<ul style="list-style-type: none"> <li>▶ Update analysis of other potential bidders based on media searches from publicly available information and compile a list of findings.</li> <li>▶ Contact potential bidding cities to determine interest if they will respond.</li> <li>▶ Use our contacts and EY Global Resources to determine potential other bidders.</li> <li>▶ Confirm that other bidders can be overcome</li> <li>▶ Refine services cost estimates in context of desired legacy impact</li> </ul>
(i) Identification of issues related to land use, physical planning, infrastructure (including transportation) and other matters associated with World Expo site within the City; and	<ul style="list-style-type: none"> <li>▶ Determine primary site for Expo</li> <li>▶ Prepare valuation of proposed lands under current use</li> <li>▶ Prepare highest and best use valuation of proposed site</li> <li>▶ Prepare valuation of proposed site after servicing and remediation</li> <li>▶ Provide recommendations on obtaining the best value for the City's land and possible financials structures including lease, sale-lease back, sales and other options.</li> </ul>
(j) Market sounding for corporate support and possible sponsorship opportunities;	<ul style="list-style-type: none"> <li>▶ Prepare market sounding of corporate support for Expo bid including focus groups and open forums</li> </ul>



Scope of Services	Key Activities
	<ul style="list-style-type: none"><li>▶ Review prior sponsorship agreements and determine best structure for the City</li><li>▶ Prepare estimate of the potential sponsorship level available for the bid</li><li>▶ Provide recommendations on sponsorship structures and approach and controls</li><li>▶ Determine processes followed by other Expo cities and confirm best practices</li></ul>
(k) Bid Organizing committee	<ul style="list-style-type: none"><li>▶ Prepare recommendations on structure and nature of bid committee</li><li>▶ Provide recommendations on city's role in design and vision for the Expo</li><li>▶ Confirm composition of bid committee</li></ul>
(l) Prepare risk assessment of Expo project and strategy to mitigate such risks.	<ul style="list-style-type: none"><li>▶ Prepare risk assessment of key processes in bid process and operations of the Expo</li><li>▶ Determine strategies to mitigate risks in practical manner</li><li>▶ Develop controls over costs and prepare expense policy for Bid committee</li><li>▶ Determine audit program for annual cost and value for money audits.</li><li>▶ Benchmark against best practices.</li></ul>

## Appendix A: Scope of Work



Scope of Services	Key Activities	Report Reference
(a) Engagement management;	<ul style="list-style-type: none"> <li>▶ Meet with City staff to confirm scope and deliverables.</li> <li>▶ Assign responsibility to EY and City staff for given tasks.</li> <li>▶ Determine appropriate schedule for process update meetings.</li> <li>▶ Review information provided by City staff.</li> </ul>	▶ N/A
(b) A summary of the bid procedures for: <ul style="list-style-type: none"> <li>(i) The Bureau of International Exhibitions (BIE) and the Government of Canada for the World Expo Bid;</li> <li>(ii) The Government of Canada, the International Olympic Committee and the Canadian Olympic Committee (COC) for the Olympic Bid.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Review bid procedures in BIE and Government of Canada literature and proprietary databases for the World Expo bid.</li> <li>▶ Consider procedures and their impact on the City.</li> <li>▶ Suggest high level alternatives to deal with any issues identified.</li> <li>▶ Discuss process with subcontractors and EY Global Resources.</li> <li>▶ Review bid procedures in IOC, COC and Government of Canada literature and proprietary databases for the Olympic bid.</li> <li>▶ Contact Heritage Canada and BIE to confirm bid procedure and support.</li> <li>▶ Consider procedures and their impact on the City.</li> <li>▶ Suggest high level alternatives to deal with any issues identified.</li> </ul>	▶ Page 20
(c) An overview of the current provincial and federal process to select a location to host 2024 Olympic Games and World Expo 2025, the competitive position of the Greater Toronto Area with respect to these processes and the level of support the City should expect from other orders of government;	<ul style="list-style-type: none"> <li>▶ Review processes set by federal and provincial governments to select bidders.</li> <li>▶ Consider procedures and their impact on the City and compare them to other potential bid sites in terms of key issues identified by our review.</li> <li>▶ Discuss process with subcontractors and EY Global Resources</li> <li>▶ Review media and other releases to determine current government appetites to host large scale events.</li> <li>▶ Consider the impact of any such statements on any potential City bid.</li> <li>▶ Based on previous large events in Canada, estimate potential governmental support at an order of magnitude level.</li> </ul>	▶ Page 26



Scope of Services	Key Activities	Report Reference
<p>(d) Information with respect to other City-regions and nations expected to bid for the 2024 Olympic Games and/or 2025 World Expo, including comments on the "unofficial continental rotation policy" for awarding international events;</p>	<ul style="list-style-type: none"> <li>▶ Identify other potential bidders based on media searches from publicly available information and compile a list of findings.</li> <li>▶ Consider previous locations of events (both major and minor fairs for the World Expo report) and the impact on any potential bids put forth by the City.</li> <li>▶ Determine timing of next North American bids based on unofficial continental rotation policy.</li> <li>▶ Use our contacts and EY Global Resources to determine potential other bidders.</li> <li>▶ The host city selection process will be reviewed with the appropriate provincial and federal government agencies; the competitive position of Toronto in Canada as host for Expo 2025 and level of support by three orders of government will be assessed.</li> <li>▶ The available information, primarily from the BIE, will be reviewed for information on potential international competitors to host Expo 2025. The BIE criteria for choosing a host city, including the continental rotation policy, are on file with the Team. The winning and losing cities bidding for previous major Expos and for Expo 2015 are known from Team files and from the BIE; the cities bidding for Expo 2020 are known. We will make an assessment of the competitive position of Toronto for a 2025 bid based on the above information.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Appendix "D"</li> </ul>



Scope of Services	Key Activities	Report Reference
<p>(e) Preliminary analysis and advice, based on a review of the history of past decisions of City Council, background material, public consultation and/or lessons learned with regard to prior Olympics or World Expo bids, as well as, post event impact studies on the following:</p> <ul style="list-style-type: none"> <li>a. The current relevance of those decisions/consultations, and an appropriate process for additional public consultations;</li> <li>b. The approximate number and types of jobs, including approximate income levels, that can be created by hosting the 2024 Olympic Games and World Expo 2025, including:                             <ul style="list-style-type: none"> <li>i. Creative sector jobs;</li> <li>ii. Service sector jobs;</li> <li>iii. Construction jobs;</li> <li>iv. Manufacturing jobs;</li> <li>v. Temporary jobs;</li> <li>vi. Contract jobs; and</li> <li>vii. Permanent jobs.</li> </ul> </li> <li>c. The approximate amount of revenue the City could receive as a result of hosting the 2024 Olympic Games and World Expo 2025, in Toronto, by                             <ul style="list-style-type: none"> <li>i. changes in property tax assessments on the venue site(s) and associated businesses/properties;</li> <li>ii. rent, lease or other income from city-owned lands if used for the Olympic Games and/or World Expo;</li> <li>iii. equity returns if city lands are used as an equity contribution to a private project;</li> <li>iv. economic returns to the federal, provincial and municipal treasuries; and</li> <li>v. other revenue opportunities, including those that may be negotiated with the provincial and federal governments, including funding to repair and maintain Toronto Community Housing Corporation buildings, to support social programs and to expand and maintain public transit.</li> </ul> </li> <li>d. Identification of city-owned lands suitable for an Olympic or World Expo site;</li> <li>e. Identification of scenarios to maximize Toronto's potential revenues and legacy projects arising from Olympic Games or World Expo;</li> </ul>	<ul style="list-style-type: none"> <li>▶ Determine nature and timing of any public consultations and the impact of such meetings on the timing and nature of the City's bid and determine if such past statements would support either an Olympic or World Expo bid.</li> <li>▶ The decisions of Council and reports of city departments concerning previous Toronto Expo bids will be reviewed. The reasons that the three previous bids - Expo 98, Expo 2000, and Expo 2015 - were not successful will be discussed and lessons learned for an Expo 2025 bid will be summarized.</li> <li>▶ The results of previous public consultation processes will be summarized and a process for Expo 2025 outlined.</li> <li>▶ Assess impact of public consultations on previous large scale consultations held by the City.</li> <li>▶ Provide an order of magnitude level job study by reviewing job creation levels for other large scale events that are similar in nature (Olympics, World Cup tournament etc.) and use this info to estimate the impact to the City for each of the Olympics and World Expo. Such data will come from publicly available media sources, proprietary data bases or, where applicable, relevant organizing committee publications, as applicable.</li> <li>▶ Consult with City staff to determine appropriate venue hosting/rent fees for each event after determining where such locations will be situated/constructed;</li> <li>▶ Compare estimates above to current property tax levels.</li> <li>▶ Consult with City staff to determine what share of equity positions would be acceptable/expected to the City for either event. Also consider whether the City would expect to be protected from loss in a downside scenario.</li> <li>▶ Review public and proprietary tourism data to extrapolate potential benefits to the City, both during and after each event based on a comparison with other locations that have held similar events. Assumptions will be based on demographic information from previously held events.</li> <li>▶ Based on a review of publicly available media, conclude on provincial and federal government appetite for funding municipal capital or operating requirements (housing, infrastructure, transportation, etc.).</li> <li>▶ Based on a review of City owned real estate, determine what sites may be suitable for hosting either event.</li> <li>▶ Public lands (City, Provincial, Federal and their agencies) will be identified and their suitability for Expo 2025 assessed. The Team has available tested criteria for successful Expo sites.</li> <li>▶ A range of estimates will be made based on the specialized knowledge of a Team Member in providing the estimates for the Toronto Expo 2000 feasibility study, in directing the feasibility studies for Toronto Expo 1998 and Ottawa 2005 on behalf of Ernst &amp; Young, and in directing the Toronto 2015 feasibility study. The estimates will be based on experience at past Expos in penetrating the market populations available to them. These estimates may be modified if the available sites are smaller than can accept the estimated attendance without dangerous overcrowding.</li> </ul>	<p>▶ Page 50</p> <p>▶ Page 51</p> <p>▶ Page 57</p> <p>▶ Page 65</p>



Scope of Services	Key Activities	Report Reference
<ul style="list-style-type: none"> <li>f. The impact of the Olympics or a World Expo on Toronto's ability to attract tourists and convention/conference business;</li> <li>g. The legacy the Olympics or a World Expo would have for the City of Toronto and region, Ontario and Canada, including the impact on:                             <ul style="list-style-type: none"> <li>i. Trade and investment;</li> <li>ii. The environment and environmental sustainability;</li> <li>iii. Transit and transportation;</li> <li>iv. Major infrastructure;</li> <li>v. Economic development;</li> <li>vi. Arts and culture;</li> <li>vii. Communities and urban planning;</li> <li>viii. Research, high-tech and innovation;</li> <li>ix. Affordable housing, social and community improvements;</li> <li>x. Waterfront redevelopment;</li> <li>xi. Expansion of Toronto's tourism base by marketing the city abroad; and</li> <li>xii. Showing the City's diversity, citizenship, multiculturalism and inclusion to the world.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▶ The economic impact of Expo 2025 or Olympics 2024 will be assessed based on the experience of past expos / Olympics and the estimates of previous feasibility studies. Expo financial success is driving largely attendance given the long event time while Olympic financial success is driven by television revenues.</li> <li>▶ An important impact will be on tourism. This results from the large number of foreign, mostly American, visitors that have been shown to attend previous events. An estimate of the numbers of foreign tourists will be extrapolated from these attendance estimates. The spending of these tourists on travel, accommodation, meals, entertainment and other retail off site as well as for tickets and other spending on the site will benefit local and provincial businesses and result in substantial taxes for governments.</li> <li>▶ An estimate of full time equivalent (FTE) jobs will be made based on previous studies. Estimates of tax revenues to the three orders of government will be made on the basis of these studies</li> <li>▶ The construction of Expo or Olympic sites may advance existing plans, including Waterfront Toronto plans, by the remediation of polluted soils, and the provision of underground and transportation services.</li> <li>▶ New and cultural and/or entertainment buildings such as the Sydney Opera House or the Buckminster Fuller Dome in Montreal created for Expo 67, may be retained as permanent icons for Toronto.</li> <li>▶ Based on a review of publicly available information, determine what other jurisdictions have done to maximize revenue/enhance legacy projects.</li> <li>▶ Determine, based on publicly available information, the impact from event hosting on tourism, conferences and investment.</li> <li>▶ Identify any significant infrastructure needed and compare such needs to current and projected future state.</li> <li>▶ The foreign tourists attending may be persuaded to spend additional time visiting other parts of Ontario and Canada. This requires cooperation between the organizing body and other agencies responsible for tourism at the three orders of government. An estimate of the increment in Ontario tourism outside the GTA during the event period will be made based on past studies. Evidence from the past two Canadian Expos shows that cooperation between such agencies and Expo may improve and sustain tourism in the years after Expo. The evidence will be provided.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Page 53</li> <li>▶ Pages 65</li> </ul>



Scope of Services	Key Activities	Report Reference
<p>(f) Identification of issues related to land use, physical planning, infrastructure (including transportation) and other matters associated with Olympics or a World Expo site within the City; and</p> <p>(g) Advice on how to create an Olympic or World Expo incorporating the broad principles of innovation, social responsibility, environmental sustainability and advanced technology that will be planned and executed on-time and on-budget featuring extensive civil society participation.</p>	<ul style="list-style-type: none"> <li>▶ Based on a review of publicly available information, determine what issues other cities have faced in terms of planning large scale events such as an Olympics or World Expo.</li> <li>▶ Determine, based on a review of organizing committee publications, how other cities have dealt with issues such as social responsibility, environmental sustainability, etc.</li> </ul>	<p>▶ Pages 57</p>
<p>(h) An estimate of the time and cost required to undertake further detailed analysis and due diligence to prepare a report addressing all components outlined in this SOW;</p>	<ul style="list-style-type: none"> <li>▶ In consultation with City staff, determine the level of detail required.</li> <li>▶ Based on discussions with City staff, provide a detailed time budget and cost estimate.</li> </ul>	<p>▶ Page 70</p>
<p>(i) An estimate of the time and funding required to prepare formal bids for the 2024 Olympic Games and 2025 World Expo, including the type and magnitude of future commitments necessary for a successful bid;</p>	<ul style="list-style-type: none"> <li>▶ Based on the bid submission requirements listed above, compile a detailed time budget with the assistance from City staff.</li> <li>▶ The lessons learned from Toronto's three previous bids will be identified and reflected in the following analysis of the bid process:</li> <li>▶ The time and cost required to prepare a comprehensive feasibility study and any associated reports will be determined.</li> <li>▶ The nature of a successful bid organization and its funding will be described.</li> <li>▶ The time and cost to negotiate with the provincial and federal governments and to prepare further reports that may be required will be estimated.</li> <li>▶ The contents of the bid documents required by the BIE will be identified and the time and cost to prepare them estimated.</li> </ul>	<p>▶ Page 20</p>
<p>(j) The consultant will be expected to provide two separate reports - one report for the 2024 Olympic Games and the second report for the World Expo 2025. Each report will address the requirements set out in Section 5 of the Statement of Work.</p>	<ul style="list-style-type: none"> <li>▶ Draft interim report and present to City staff for comments.</li> <li>▶ Consider City staff comments and adjust report accordingly, as appropriate</li> </ul>	<p>▶ Complete</p>

## Appendix B: Information Sources

During the course of our work, EY consulted the following individuals and organizations:

### Organizations consulted

<i>Government</i>	<i>Organizations</i>	<i>Other stakeholders</i>
City of Toronto - Pan American Games Liaison	International Olympic Committee	Canada Lands Corporation
Toronto Economic Development Department	Canadian Olympic Committee	Canadian National Exhibition
Toronto Planning Department	Bureau International des Expositions	Carpenters Union Local 27
Toronto Police Services	University of Toronto	Toronto Hotel Association
Toronto Transit Commission	VANOC 2000	Tourism Toronto
Toronto Transportation Services	Toronto 2008 Bid Committee	Paul Henderson
Toronto Waterfront Secretariat	Dundee Kilmer Developments LP	Mike Chambers
Toronto Port Lands Company	Metrolinx	Irene Kerr
Heritage Canada	Ontario Place Corp	Carmen Sylvan
Ontario Ministry of Culture Tourism & Sports	Toronto Sports Council	Bob Richardson
City of Toronto - Finance		Karen Pitre
Water		Joe Halstead
		Richard Pound
		Dave Podmore
		Walter Seiber
		Mark Maloney
		Steven Staples
		Steve Tanny

Although E&Y did not undertake an exhaustive review of the existing relevant body of research, E&Y reviewed the following documents:

## Literature and other supporting information

Name of Document	Author	Year
Memo to J. Halstead, Commissioner of Economic Development, Culture & Tourism regarding the Financial Review of the 2008 Olympic Games Budget	W. Liczyk, Chief Financial Officer and Treasurer	2000
Virginia Tech College of Natural Resources & Environment, "Toronto's Olympic Ambitions: An Investigation of the Olympic Bidding Legacy in one Modern City"	Robert D. Oliver, Assistant Professor, VirginiaTech	2011
Feasibility Study of a World's Fair in Toronto in 2015 - Final Report	Consortium 2013: Steven Staples, du Toit Allsopp Hillier, BA Group, Jeff Shamie, Nichole Swerhun, TCI Management Consultants, Hanscomb Limited	2005
"Istanbul" - Finance - Impact of OCOG Tax Status of Operations	Unknown	2012
Economic Benefits of the 23rd Olympiad in Los Angeles 1984	Harrison Price Company	1982
Winning and Losing in the Attractions Business	Harrison A. Price, Harrison Price Company	1984
The Role and Impact of Mega Events and Attractions on National and Regional Tourism: A Conceptual and Methodological Overview	Dr. J.R. Brent Richie (Calgary) and Ju Yangzhou (Xian)	1988
Hosting a Major Event	R.J. (Bob) Fleming, President, Calgary Tourist & Convention Bureau	1987
Memo to the Canadian Government Travel Bureau regarding a copy of the Economic and Financial Effects of Expo 67 Report, including the attached Report.	Otto E. Thur	1972
Beyond 2012 - The London 2012 Legacy Story	Department for Culture, Media and Sport	2012
Identifying and Evaluating the Impacts of the 2012 Olympics: London Borough of Hounslow	WPI (Worcester Polytechnic Institute) - Andy Creeth, Eric Spazzarini, Cody Shultz & Cordell Zebrose	2011
Our New Blue Edge Comes to Life - Building Our New Blue Edge (brochure)	WATERFRONToronto, City of Toronto, Government of Ontario & Government of Canada	Unknown
2020 Candidature Acceptance Procedure - Games of the XXXII Olympiad	International Olympic Committee	2011
Toronto Port Lands Company Corporate Plan 2010 - 2013 (booklet)	Toronto Port Lands Company	2010
Statistical Bulletin - Overseas Travel and Tourism, August 2012	Office for National Statistics	2012
London 2012 - Delivering the Economic Legacy	UK Trade & Investment	2013



Name of Document	Author	Year
The London 2012 Olympic Games and Paralympic Games: Post-Games review	Report by the Comptroller and Auditor General, National Audit Office	2012
Progress Report from UK Trade & Investment - London 2012: Delivering the Economic Legacy	UK Trade & Investment	2013
Factsheet - Beijing Facts & Figures - Updated August 2009	International Olympic Committee	2009
The 2008 Toronto Olympic Bid - Public Consultation	City of Toronto Council and Committees, Clerk's Office	1998
The 2008 Bid: We risk \$1 billion debt to get Olympics	Charles Smedmor & Associates - The Toronto Star, Editorial and Opinion Page	1998
Our Toronto - Canada Gateway to New Canada Gateway to the New Canada - Waterfront	Robert A. Fung	Unknown
2012 Summer Olympics	Wikipedia	2013
Venues of the 2015 Pan American and Parapan American Games	Wikipedia	2013
2024 Summer Olympics	Wikipedia	Unknown
2008 Summer Olympics	Wikipedia	Unknown
Olympic Village	Wikipedia	2013
Staff Action Report to the City of Toronto Executive Committee - Toronto 2015 Pan American/ParaPan American Games Bid	City of Toronto - City Manager	2009
Staff Report Action Required - City of Toronto Final Report - Downsview Area Secondary Plan Review to the North York Community Council	Director, Community Planning, North York District	2010
Executive Summary - Community Economic Impact of the 1984 Olympic Games in Los Angeles with an attached cover sheet relating to the City of Toronto, Allocation of Work Plan Items	Economics Research Associates	1984
Reports, Books & Files on Relevant Expos. Roaster Assignment #9144-11-7001-Cat2MC19-27	Steven Staples	2013
"Tokyo" - 06 Finances - Tokyo - 2020	Unknown	Unknown
City of Toronto - Feasibility Study - Hosting 2024 Olympic Games and World Expo 2025 - Statement of Work for External Management Consultants. Roster Assignment #9144-11-7001-Cat2MC19-27	Unknown	2013
"Madrid 2020" - 06 Finance - OCOG Budget	Unknown	2012
An Economic Analysis of the Barcelona '92 Olympic Games: Resources, Financing, and Impact	Ferran Brunet	1995

Name of Document	Author	Year
City branding and the Olympic effect: A case study of Beijing	Li Zhang, Simon Xiaobin Zhao	2009
The Economic Impact of the London 2012 Olympics	Adam Blake	2005
Assessing the impact of the 2004 Olympic Games on the Greek economy: A small macroeconomic model	Evangelia Kasimati and Peter Dawson	2008
Going for gold: two perspectives on the Olympic Games: 321 Globalization, cities and the Summer Olympics; 341 Mapping the Olympic growth machine: transnational urbanism and the growth machine diaspora	John R. Short	2008
The Expo Story - The Macroeconomic Consequences of Expo 86	Charles Blackorby, Robert Picard and Margaret Slade	1986
"Toronto's Olympic Ambitions: An Investigation of the Olympic Bidding Legacy in one Modern City"		
Bidding for the Future: Toronto's 2008 Olympic bid and the Regulation of Waterfront land	Robert Douglas Oliver	2008
How to Win the Olympic Games - The Empirics of Key Success Factors of Olympic Bids	Arne Feddersen, Wolfgang Maenning, and Philipp Zimmermann	2007
Port Lands Acceleration Initiative - Appendix 8, Infrastructure Investment Required to Enable Port Lands Development	WATERFRONToronto, City of Toronto, Toronto & Region Conservation for the Living City	2012
Olympic Marketing Fact File	International Olympic Committee	2012
1988 Seoul International Conference - Hosting the Olympics: The Long-Term Impact - Report of the conference, Olympic Form: Themes of Permanence and Transience	Julian Beinart, Massachusetts Institute of Technology	1988
Expo 2015 Bid Document Review - Final Report prepared for Canadian Heritage	Government Consulting Services, Public Works and Government Services Canada	2006
Canadian Balance of Payments on Travel Account, World Total (charts and schedules)	Statistics Canada	1991
Travel and Economic Impacts of the 1984 Olympic Games and 1984 Louisiana World Exposition	Harrison A. Price	1983
Response to Peer and Financial Review of the Feasibility Study of a World's Fair in Toronto in 2015	Steven Staples, du Toit Allsopp Hillier, BA Group & TCI Management Consultants	2006
Toronto Economic Development Corporation, Toronto 2015 World Expo Project, Economic Feasibility Study, Interim Findings: Presentation to City of Toronto April 20, 2006	PriceWaterhouseCoopers	2006

Name of Document	Author	Year
Key Issues, Expo '98, Toronto, Ontario, A Discussion Paper prepared for the Events Management Secretariat, Ministry of Tourism and Recreation	Steven Staples	1991
Ministry of Tourism & Recreation: Expo 2000: Follow-On Studies: Task 2, Structure of The Expo 2000 Organization	The Coopers&Lybrand Consulting Group	1990
Toronto 2015 World Expo Bid Feasibility Study - Consultation Approach - Appendix 4.4a, Capital Cost Estimate	Unknown	2005
Toronto World Expo 2015 Corporation - Draft Final Report: Toronto 2015 World Expo Feasibility Study Transportation Analysis/Preliminary Master Plan	Cansult & LEA	2006
Lessons Learned, Expo 2015 Toronto Bid	Ann MacDiarmid & Mark Maloney, Raptor Communications	2009
Atlanta 1996: Official Report of the Centennial Olympic Games - Volume 1	The Atlanta Committee for the Olympic Games	2004
Atlanta 1996: Official Report of the Centennial Olympic Games - Volume 2	The Atlanta Committee for the Olympic Games	2004
Atlanta 1996: Official Report of the Centennial Olympic Games - Volume 3	The Atlanta Committee for the Olympic Games	2004
Atlanta 1996: Official Report of the Centennial Olympic Games - Volume 4	The Atlanta Committee for the Olympic Games	2004
Athens 2004: Official Report of the Centennial Olympic Games - Volume 1	The Athens Committee for the Olympic Games	2007
Athens 2004: Official Report of the Centennial Olympic Games - Volume 2	The Athens Committee for the Olympic Games	2007
Sydney 2000: Official Report of the Centennial Olympic Games - Volume 1	The Sydney Committee for the Olympic Games	2004
Sydney 2000: Official Report of the Centennial Olympic Games - Volume 2	The Sydney Committee for the Olympic Games	2004
London 2012 Olympic & Paralympic Games - June 2012 - Quarterly Report	United Kingdom Department for Culture, Media & Sport	2012
Tourism - international visitors [1995-2005]	Australian Bureau of Statistics	2013
Tourism - international visitors [2002-2012]	VisitBritain.org	2013
Tourism - international visitors [2006-2012]	TravelChinaGuide.com	2013
Steve Staples Proprietary Database		

## Appendix C: Themes of Past Fairs

## Themes of Past Fairs

### Montreal 1967

'Terre des Hommes - Man and his World'

The theme was sub-divided into three major categories, each in a separate theme pavilion. These were:

- ▶ Man in the Community
- ▶ Man the Producer, and
- ▶ Man the Provider

### Osaka 1970

'Progress and Harmony for Mankind'

Osaka's theme, all contained in one pavilion at the center of the fair site, was also divided into three main sub-themes:

- ▶ World of Progress
- ▶ World of Harmony, and
- ▶ World of Mystery

### Seville 1992

'The Age of Discoveries', in three separate pavilions and designated as:

- ▶ The Navigation Pavilion
- ▶ The Discoveries Pavilion, and
- ▶ The Pavilion of the Future

## BIE

The theme is important to the BIE as a way to organize a world's fair and particularly the exhibits of the participants. Since BIE world's fairs, as distinct from trade fairs, emphasize education, acceptable themes should, as described in the BIE Convention, "exhibit the means at man's disposal for meeting the needs of civilization, or demonstrate the progress achieved in one or more branches of endeavour, or show prospects for the future." (BIE Convention, Part I, Article I)

### Relevance to the Host City and Country

The theme must have some specific relevance to the past, current or future of the host city and country. A good example is Seville's theme of 'The Age of Discovery' that celebrated Columbus' voyage to the New World five hundred years earlier. He is said to have started that voyage from Seville.

## Exhibitors

The principal way in which a theme is illustrated is by the exhibits in the pavilions built by the national and corporate participants. The exhibition corporation at a major world's fair will also usually build special theme pavilions in which various aspects of the theme are exhibited.

In practice, the exhibits may not have much to do with the theme at all; this will depend on the sophistication of the individual participants and the creativity of the designers they commission to conceive and build their exhibits.

## Concept Plan

The concept or physical master plan for a world's fair can exemplify the theme. The one modern fair where the planners, to our knowledge, attempted this was at Montreal's Expo 67. The site of the fair, using the sub-theme of 'Man in the Community', was planned as an example of what a downtown might be. The plan was transit- oriented, car free and emphasized the comfort of pedestrians.

Not all themes will lend themselves to this kind of development.

## Appendix D: Summary of cities potentially bidding for World Expo 2025

The following cities may be considering a bid for World Expo 2025. Key elements of each city are noted below.

- ▶ Shanghai, China
  - ▶ A bid from Shanghai would not likely have a serious chance at hosting the Expo due to the fact that the same city hosted in 2010.
- ▶ Houston, USA
  - ▶ The United States is not a member of the BIE. As such, any American city would not have a good chance at hosting the Expo.
- ▶ London, England
  - ▶ London previously held a World's Fair earlier in the 20<sup>th</sup> century. This may be a favourable factor for a London bid given that many organizations like to return to the same city out of a sense of nostalgia. Furthermore, London is a major world city with significant other benefits. However, finding the space to host the Expo after hosting the Olympic Games in 2012 may be problematic.
- ▶ Paris, France
  - ▶ Paris has many of the same characteristics as London, but without the recent hosting of the Olympics. Paris is rumoured to be considering an Olympic bid for 2024 and this would likely preclude any bid for the Expo given the significant cost and organizational requirements for two mega events within a year of each other.
- ▶ Bay Area, USA
  - ▶ San Francisco and Oakland will have many of the same drawbacks as Houston, and it is unlikely that the BIE would choose to hold the Expo in a non-member country.
- ▶ Tehran, Iran
  - ▶ The political situation in Iran makes unlikely that the city would be successful in winning an Expo.



Based on the information above, EY is of the view that a bid from Toronto would have a strong chance of being chosen as the host city for the Expo. Furthermore, Canada has hosted 2 very successful events in Montreal and Vancouver which would likely reflect well on a bid from the City. There has also been only one major fair in North America while other continents have hosted more. This may play into an unofficial continental rotation policy.

## Appendix E: BIE protocol

**PROTOCOL**  
**To amend the Convention signed in Paris the**  
**22<sup>nd</sup> November 1928 relating to**  
**International Exhibitions**



Bureau  
International  
des Expositions

**BUREAU INTERNATIONAL DES EXPOSITIONS**  
**34 AVENUE D'IENA – 75116 PARIS**

## **PROTOCOL**

### **TO AMEND THE CONVENTION SIGNED AT PARIS ON THE 22ND OF NOVEMBER 1928 RELATING TO INTERNATIONAL EXHIBITIONS**

The Parties to the present Convention:

Considering that the rules and procedures established by the Convention relating to International Exhibitions, signed at Paris on the 22nd of November 1928, amended and supplemented by the Protocols of the 10th of May 1948 and the 16th of November 1966 have proved useful and necessary to the organisers of exhibitions as well as to participating countries;

Desirous of adapting to modern conditions the said rules and procedures, together with those relating to the organisation responsible for ensuring their application and of consolidating these and other provisions in a single instrument which will replace the 1928 Convention;

Have agreed as follows:

#### **ARTICLE I**

The objects of the present Protocol are:

- a) to amend the rules and procedures concerning international exhibitions;
- b) to amend the provisions regarding the operations of the International Exhibitions Bureau.

#### **AMENDMENT OF THE CONVENTION ARTICLE II**

The 1928 Convention is further amended by the present Protocol in accordance with the aims expressed in Article I. The text of the Convention as so amended is set out in the Appendix to the present Protocol of which it forms an integral part.

**ARTICLE III**

1. The present Protocol shall remain open for signature by Governments Parties to the 1928 Convention at Paris from November 30th, 1972 until November 29th, 1973 and thereafter shall remain open for accession by them.
2. Governments Parties to the 1928 Convention may become Parties to the present Protocol by:
  - a) signature without reservation as to ratification, acceptance or approval;
  - b) signature subject to ratification, acceptance or approval followed by ratification, acceptance or approval, or
  - c) accession.
3. Instruments of ratification, acceptance, approval or accession shall be deposited with the Government of the French Republic.

**ARTICLE IV**

The present Protocol shall enter into force on the date on which twenty-nine States shall have become parties to it in accordance with the provisions of Article III.<sup>1</sup>

**ARTICLE V**

The provisions of the present Protocol shall not apply to the registration of an exhibition for which a date has been reserved by the Bureau International des Expositions not later than the meeting of the Administrative Council which immediately preceded the entry into force of the present Protocol in accordance with Article IV above.

**ARTICLE VI**

The Government of the French Republic shall inform the Governments of the Contracting Parties and also the Bureau International des Expositions of:

- a) signatures made and ratifications, approvals, acceptances and accessions deposited in accordance with Article III;
- b) the date on which the present Protocol enters into force in accordance with Article IV.

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<sup>1</sup> *The present Protocol entered into force on the 9<sup>th</sup> of June 1980.*

**ARTICLE VII**

As soon as the present Protocol enters into force, the Government of the French Republic shall cause it to be registered with the Secretariat of the United Nations in accordance with Article 102 of the Charter of the United Nations.

*IN WITNESS WHEREOF* the undersigned, being duly authorised thereto, have signed the present Protocol.

*DONE AT PARIS* this 30th day of November 1972 in the French language in a single copy which shall be deposited with the Government of the French Republic. The French Government shall transmit certified copies to the Governments of all the Parties to the 1928 Convention.

<b><u>COUNTRY</u></b>	<b><u>NAME</u></b>	<b><u>NOTE</u></b>
For the Government of the Republic of Austria	Erich BIELKA 28/09/1973	Subject ratification to
For the Government of the Kingdom of Belgium	R. ROTHSCHILD R. RAUX	Subject ratification to
For the Government of the People's Republic of Bulgaria	E. RAZLOGOV	Subject reservation and declaration expressed at the moment of signature to
For the Government of the Byelorussian Soviet Socialist Republic	V. ANICHTCHOUK	Subject reservation expressed in the mandates and in the declaration to
For the Government of Canada	Claude T. CHARLAND	
For the Government of the Socialist Republic of Czechoslovakia		
For the Government of the Kingdom of Denmark	Poul ASSAM	Subject ratification to
For the Government of the Republic of Finland	Olle HEROLD	Subject ratification to
For the Government of the French Republic	Christian D'AUMALE	
For the Government of the Federal Republic of Germany	S. Von BRAUN	
For the Government of the Kingdom of Greece		
For the Government of the Republic of Haiti		

For the Government of the People's Republic of Hungary	Laszlo FOLDES	Subject reservation contained in the mandates	to the
For the Government of the State of Israel	Israël HAVIV	Subject ratification	to
For the Government of the Italian Republic	F. MALFATTI	Subject ratification	to
For the Government of Japan			
For the Government of the Republic of Lebanon			
For the Government of the Principality of Monaco	Pierre-Louis FALAIZE	Subject ratification	to
For the Government of the Kingdom of Morocco			
For the Government of the Kingdom of the Netherlands	J.A. de RANITZ	Subject ratification	to
For the Government of the Federal Republic of Nigeria			
For the Government of the Kingdom of Norway	Hersleb VOGT	Subject ratification	to
For the Government of the People's Republic of Poland	Michata KAJZERA	Subject reservation of ratification and under reservation expressed in the <b>note verbale</b> of November 30 <sup>th</sup> , 1972 (N° Z-II-OME-BIE)	to
For the Government of the Portuguese Republic	A. LENCASTRE da VEIGA 29 November 1973	Subject ratification	to



For the Government of the Socialist Republic of Rumania	C. FLITAN 8 November 1973	Subject to reservation of ratification and under the reservation mentioned in the mandates according to the provisions of article 34, paragraphs 3 and 4 and with declaration in article 35
For the Government of Spain	E. de MOTTA y ZAYAS	
For the Government of the Kingdom of Sweden	D. WINTER	Subject to ratification
For the Government of the Swiss Confederation	Max TROENDLE	Subject to ratification
For the Government of the Republic of Tunisia	Abdessalem BEN AYED	
For the Government of the Ukrainian Soviet Socialist Republic	Alexandre GORDENOK	Subject to reservation and declaration conveyed at the moment of signature
For the Government of the United Kingdom of Great-Britain and Northern Ireland	D. LOGAN F. SEDGWICK-JELL	
For the Government of the United States of America	Jack B. KUBISH	Subject to reservation of ratification and of the declaration mentioned in the <b>note verbale</b> N° 201 of November 29 <sup>th</sup> , 1972
For the Government of the Union of Soviet Socialist Republics	Youri BORISSOV	Subject to reservation and declaration conveyed at the moment of signature

**CONVENTION****RELATING TO INTERNATIONAL EXHIBITIONS  
SIGNED AT PARIS ON NOVEMBER 22<sup>ND</sup>, 1928,  
AND SUPPLEMENTED BY THE PROTOCOLS OF MAY 10<sup>TH</sup>, 1948,  
NOVEMBER 16<sup>TH</sup>, 1966, NOVEMBER 30<sup>TH</sup>, 1972  
AND THE AMENDMENT OF JUNE 24<sup>TH</sup>, 1982  
AND THE AMENDMENT OF MAY 31<sup>ST</sup>, 1988****PART I - DEFINITIONS AND OBJECTIVES****ARTICLE 1**

1. An exhibition is a display which, whatever its title, has as its principal purpose the education of the public: it may exhibit the means at man's disposal for meeting the needs of civilisation, or demonstrate the progress achieved in one or more branches of human endeavour, or show prospects for the future.
2. An exhibition is international when more than one State takes part in it.
3. Participants in an international exhibition comprise on the one hand exhibitors of States which are officially represented grouped into national sections, on the other hand international organisations or exhibitors from countries which are not officially represented and lastly those who are authorised in accordance with the regulations of the exhibition to carry on some other activity, in particular those granted concessions.

**ARTICLE 2**

This Convention applies to all international exhibitions except:

- a) exhibitions lasting less than three weeks;
- b) fine Arts exhibitions;
- c) exhibitions of an essentially commercial nature.

"Whatever title may be given to an exhibition by its organisers, this Convention recognises a distinction between registered exhibitions and recognised exhibitions."

## **PART II - GENERAL CONDITIONS GOVERNING THE ORGANISATION OF INTERNATIONAL EXHIBITIONS**

### **ARTICLE 3**

International exhibitions presenting the following features shall be eligible for registration by the Bureau International des Expositions referred to in Article 25 below:

- a) Their duration may not be less than six weeks nor more than six months;
- b) The rules governing the exhibition buildings used by the participating States shall be laid down in the general regulations of the exhibition. If a tax is chargeable on property under the legislation of the inviting State, the organisers shall be responsible for paying it. Only services actually rendered in accordance with the regulations approved by the Bureau shall qualify for reimbursement;
- c) From January 1<sup>st</sup>, 1995 the interval between two registered exhibitions shall be at least five years; the first exhibition may be held in 1995. The Bureau International des Expositions may nevertheless accept a date not more than one year earlier than the date resulting from the above provision, to allow celebration of a special event of international importance, without however altering the five-year interval laid down in the original calendar.

### **ARTICLE 4**

- A) International exhibitions presenting the following features shall be eligible for recognition by the Bureau International des Expositions:
1. their duration may not be less than three weeks nor more than three months;
  2. they must illustrate a definite theme;
  3. their total surface area must not exceed 25 ha;
  4. they must allocate to the participating States premises constructed by the organiser, free of all rents, charges, taxes and expenses other than those representing services rendered; the largest space allocated to a State must not exceed 1.000 m<sup>2</sup>. The Bureau International des Expositions may however authorise a derogation from the requirement

that premises be allocated free of charge if the economic and financial situation of the organising State justifies it;

5. only one recognised exhibition, pursuant to this paragraph A, may be held between two registered exhibitions;
6. only one registered exhibition or exhibition recognised pursuant to this paragraph A, may be held in the same year.

B) The Bureau International des Expositions may also grant recognition to:

1. the Milan Triennial Exhibition of Decorative Arts and Modern Architecture, on grounds of historical precedence, provided that it retains its original features;
2. All horticultural exhibitions approved by the International Association of Horticultural Producers, provided that there is an interval of at least two years between such exhibitions in different countries and at least ten years between events held in the same country;

due to be held in the interval between two registered exhibitions.

## **ARTICLE 5**

The opening and closing dates of an exhibition and its general features shall be laid down at the time of registration or recognition and may be changed only with the agreement of the BIE

## **PART III - REGISTRATION**

### **ARTICLE 6**

1. The Government of a Contracting Party in whose territory an exhibition coming within the scope of the Convention is planned (hereinafter referred to as "the inviting Government") shall send to the Bureau an application for registration or recognition indicating the laws, regulations or financial measures it proposes to make for the exhibition. The Government of a non-contracting State wishing to obtain registration or recognition of an exhibition may apply to the Bureau in the same way provided that it undertakes to comply with the provisions of the Convention set out in Parts I, II, III and IV and the regulations made for their implementation.

2. The application for registration or recognition shall be made by the Government responsible for the international relations of the place in which the exhibition is planned to be held (hereinafter referred to as "the inviting Government") even if this Government is not the organiser of the exhibition.
3. The Bureau shall in its compulsory regulations determine the maximum period for which a date for an exhibition may be reserved and the minimum period for receipt of an application for registration or recognition; it shall also specify the documents which must accompany such an application. It shall also fix by compulsory regulation the amount of the contribution to be paid for the costs of examination of the application.
4. Registration or recognition shall be granted only if the exhibition fulfils the conditions of this Convention and of the regulations laid down by the Bureau.

#### **ARTICLE 7**

1. When two or more countries compete for the registration or recognition of an exhibition and cannot reach agreement they shall ask the General Assembly of the Bureau to arbitrate. In arriving at its decision the General Assembly shall take into account the considerations put forward and, in particular, any special reasons of an historical or ethical nature, the period which has elapsed since the last exhibition, and the number of displays already organised by the competing countries.
2. Except in exceptional circumstances the Bureau shall give preference to an exhibition organised in the territory of a Contracting Party.

#### **ARTICLE 8**

A State which has been granted the registration or recognition of an exhibition shall lose all rights arising from the registration or recognition if it changes the date reserved for the exhibition except in the circumstances provided for in Article 28 d). If it wishes to organise the exhibition at another date, the Government concerned shall make a fresh application, and if necessary, submit to the procedure laid down in Article 7 for resolving competing claims.

#### **ARTICLE 9**

1. In the case of any exhibition which has not been registered or recognised, Contracting Parties shall refuse their participation and their patronage as well as any Government subsidy.

2. Contracting Parties are quite free not to take part in an exhibition which has been registered or recognised.
3. Each Contracting Government shall use whatever means it considers most appropriate under its own legislation to act against the organisers of false exhibitions or exhibitions to which participants might be fraudulently attracted by false promises, notices or advertisements.

## **PART IV - OBLIGATIONS OF ORGANISERS OF REGISTERED EXHIBITIONS AND OF PARTICIPATING STATES**

### **ARTICLE 10**

1. The inviting Government shall ensure that the provisions of this Convention and of the regulations made for its implementation are observed.
2. If the said Government does not itself organise the exhibition it shall officially recognise the organisers for this purpose and it shall guarantee the fulfilment of the obligations of the organisers.

### **ARTICLE 11**

1. All invitations to participate in an exhibition, whether they are addressed to member States or to non-member States, shall be sent through diplomatic channels by the Government of the organising country to the Government of the country invited for that country and for the other parties in that country to be invited. The replies shall be forwarded to the inviting Government by the same channel, as well as any requests by non-invited parties to participate. The invitations shall observe the intervals prescribed by the Bureau and shall state that the exhibition in question has been registered. Invitations to organisations of international character shall be sent to them direct.
2. No Contracting Party may organise or sponsor participation in an international exhibition if the above-mentioned invitations have not been sent in accordance with the provisions of this Convention.
3. Contracting Parties undertake neither to address nor accept any invitation to participate in an exhibition, whether on the territory of a Contracting Party, or of a non-member State, in case where such invitation does not cite a registration or recognition approved according to the provision of this Convention.

4. Any Contracting Party may require the organisers not to send invitations to addressees in its territory other than itself. It may also refrain from forwarding invitations or requests to participate from parties who have not been invited.

## **ARTICLE 12**

The inviting Government shall appoint a Commissioner-General of the Exhibition in the case of a registered exhibition or a Commissioner of the Exhibition in the case of a recognised exhibition who shall be authorised to represent the Government for all purposes in connection with the Convention and in all matters concerning the exhibition.

## **ARTICLE 13**

The Government of any country participating in an exhibition shall appoint a Section Commissioner-General in the case of a registered exhibition or a Section Commissioner in the case of a recognised exhibition to represent it with the inviting Government. The Section Commissioner-General or the Section Commissioner shall have sole responsibility for the organisation of his country's exhibit. He shall inform the Commissioner-General of the Exhibition or the Commissioner of the Exhibition of the content of this exhibit and shall see that the rights and obligations of exhibitors are respected.

## **ARTICLE 14** (abrogated)

## **ARTICLE 15** (abrogated)

## **ARTICLE 16**

The Customs regulations for international exhibitions shall be those set out in the Annex, which forms an integral part of this Convention.

## **ARTICLE 17**

At an exhibition only the sections constituted under the authority of Commissioners-General or Commissioners appointed in accordance with Article 13 by the Governments of the participating countries shall be considered as national and consequently be entitled to bear this name. A national section comprises all the exhibitors of the country in question but not the concession-holders.

**ARTICLE 18**

1. At an exhibition a participant or a group of participants may use a geographical title relating to a participating Party only with the authorisation of the Section Commissioner-General or the Section Commissioner of the Government of the Party concerned.
2. If a Contracting Party is not participating in an exhibition, the Commissioner-General or the Commissioner of the exhibition shall prohibit such usage as envisaged in the preceding paragraph, on behalf of the Contracting Party.

**ARTICLE 19**

1. Anything exhibited in a national section must have a close connection with the country exhibiting it (for example, articles having their origin in the territory of the participating Government, or articles created by nationals of the country).
2. With the authorisation of the Commissioners-General or Commissioners of the other States concerned, other articles or products may be presented provided they serve only to complete the exhibit.
3. In case of dispute between participating Governments concerning paragraphs 1 and 2 above, the matter shall be referred to the college of Section Commissioners-General or Commissioners who shall decide by a simple majority of those present. Their decision is final.

**ARTICLE 20**

1. Unless there are provisions to the contrary in the laws of the organising country, no monopoly of any kind shall be granted at an exhibition. However, a monopoly for a common service may be authorised by the Bureau at the time of registration or recognition. In that case the following conditions shall be observed by the organisers:
  - a) the existence of such monopoly or monopolies shall be indicated in the regulations of the exhibition and in the participation contract;
  - b) the services subject to monopoly shall be made available to exhibitors under the conditions normally existing in the State;
  - c) the powers of the Commissioners-General or Commissioners in their respective sections shall not in any case be subjected to any limitation.



2. The Commissioner-General or Commissioner of the exhibition shall take all steps to ensure that the charges made to participating Governments are not higher than those made to the organisers of the exhibition or in any case than the normal local charges.

#### **ARTICLE 21**

The Commissioner-General or Commissioner of the Exhibition shall do everything in his power to ensure the proper and efficient functioning of the public utility services inside the exhibition area.

#### **ARTICLE 22**

The inviting Government shall make every effort to facilitate the participation of Governments and of their nationals, especially as regards transport charges and conditions of admission of persons and things.

#### **ARTICLE 23**

1. The general regulations of an exhibition shall state whether or not prizes are to be awarded to the participants irrespective of the certificates of participation which may always be granted. If prizes are to be given their allocation may be limited to certain categories.
2. If participants do not wish to compete for prizes they shall make a declaration to this effect before the opening of the exhibition.

#### **ARTICLE 24**

The Bureau International des Expositions as defined in the following Article, shall draw up regulations to determine the general conditions for the composition and functioning of juries and to decide how prizes shall be awarded.

### **PART V - INSTITUTIONAL ARRANGEMENTS**

#### **ARTICLE 25**

1. The Bureau International des Expositions was established to supervise and ensure the application of this Convention. Its members shall be the Governments of the Contracting Parties. The headquarters of the Bureau shall be in Paris.

2. The Bureau shall have legal personality. In particular, it shall have the capacity to contract, acquire and dispose of movable and immovable property and to participate in legal proceedings.
3. The Bureau shall be entitled to conclude with States and International Organisations agreements relating to such Privileges and Immunities as are necessary for the exercise of the functions entrusted to it by this Convention.
4. The Bureau shall comprise a General Assembly, a President, an Executive Committee, specialised committees, as many Vice-Presidents as there are committees and a Secretariat under the authority of a Secretary General.

#### **ARTICLE 26**

The General Assembly of the Bureau shall be composed of delegates appointed by the Contracting Parties on the scale of from one to three delegates per country.

#### **ARTICLE 27**

The General Assembly shall hold regular meetings and may also hold extraordinary meetings. It shall decide all questions which under this Convention come within the competence of the Bureau of which it is the highest authority. In particular the General Assembly shall:

- a) discuss, adopt and publish regulations relating to the registration or recognition, classification and organisation of international exhibitions, and to the proper functioning of the Bureau. Within the limits of the provisions of this Convention the General Assembly may lay down compulsory regulations and also model regulations to serve as a guide to the organisers of exhibitions;
- b) draw up the budget, check and approve the Bureau's accounts;
- c) approve the reports of the Secretary General;
- d) establish committees as necessary, and appoint members of the Executive Committee and of the other committees and establish the duration of their mandate;
- e) approve any international agreements entered into in accordance with Article 25 (3) hereof;
- f) adopt draft amendments in accordance with Article 33;

- g) appoint the Secretary General.

## **ARTICLE 28**

1. The Government of each Contracting Party, whatever the number of its delegates, shall have one vote in the General Assembly. This voting right shall be suspended if the sum of the subscriptions owed by a Contracting Government under Article 32 of this Convention exceeds the sum of the subscriptions due by it for the current year and the previous year.
2. The General Assembly shall be qualified to exercise its functions when the number of member States represented is at least two-thirds of the number of member States entitled to vote. If this quorum is not reached, the General Assembly shall be convened again with the same agenda after an interval of at least a month. In that case the quorum required shall be reduced to half the number of Contracting Parties entitled to vote.
3. Decisions shall be by a majority of the delegations present voting for or against, except that a majority of two-thirds shall be required in the following cases:
  - a) the adoption of proposals for amendments to this Convention;
  - b) the drawing up and amendment of the regulations;
  - c) the adoption of the budget and approval of the amount of the annual subscriptions of the Contracting Parties;
  - d) the authorisation for a change of opening or closing dates of an exhibition in accordance with Article 5 above;
  - e) the registration or recognition of an exhibition in the territory of a non-member State which is in competition with an exhibition in the territory of a Contracting Party;
  - f) the reduction of the intervals stipulated in Article 3 of the present Convention;
  - g) the acceptance of reservations to an amendment presented by a Contracting Party;  
such amendment being adopted in accordance with Article 33, by a four-fifths majority, or unanimously as the case may be;
  - h) the approval of any draft international agreement;
  - i) the appointment of the Secretary General.

**ARTICLE 29**

1. The President shall be elected by secret ballot of the General Assembly for a period of two years from among the delegates of the Governments of the Contracting Parties. He may not represent the State to which he belongs during his period of office. He may be re-elected.
2. The President shall call and conduct meetings of the General Assembly and ensure the proper functioning of the Bureau. In the President's absence his functions shall be exercised by the Vice-President in charge of the Executive Committee or, in the event of his incapacity, by one of the other Vice-Presidents in the order of their election.
3. The Vice-Presidents shall be elected from among the delegates of the Contracting Parties by the General Assembly which shall determine the nature and duration of their office and in particular the Committees of which they shall be given charge.

**ARTICLE 30**

1. The Executive Committee shall consist of delegates of twelve Contracting Parties, each nominating one representative.
2. The Executive Committee:
  - a) shall establish and keep up-to-date a classification of human endeavour as it may be portrayed in an exhibition;
  - b) shall examine all application for the registration or recognition of an exhibition and submit them with advice for the approval of the General Assembly;
  - c) shall discharge such tasks as are given to it by the General Assembly;
  - d) may seek the opinion of other Committees.

**ARTICLE 31**

1. The Secretary General, who shall be appointed in accordance with the provisions of Article 28 of this Convention, shall be a national of the country of one of the Contracting Parties.
2. The Secretary General shall be responsible for attending to the current business of the Bureau in accordance with the instructions of the General Assembly and of the Executive Committee. He shall draw

up a draft budget, present accounts and submit reports on his activities to the General Assembly. He shall represent the Bureau, especially in legal matters.

3. The General Assembly shall decide the other duties and responsibilities of the Secretary General as well as his terms of service.

## **ARTICLE 32**

The annual budget of the Bureau shall be adopted by the General Assembly in accordance with the provisions of paragraph 3 of Article 28. The budget shall take account of the financial reserves of the Bureau, of revenue of all kinds, and also of the debit and credit balances carried forward from previous financial years. The expenses of the Bureau shall be met from these sources and from the subscriptions of Contracting Parties calculated on the basis of the number of parts falling to each Party according to the decisions of the General Assembly.

## **ARTICLE 33**

1. Any Contracting Government may make a proposal for amendment of the Convention. The text of the said proposal and the reasons for it shall be communicated to the Secretary General who shall transmit them as soon as possible to the other Contracting Governments.
2. The proposal for amendment shall be included in the agenda of an ordinary session or of an extraordinary session of the General Assembly to be held at least three months after the date of its despatch by the Secretary General.
3. Every proposal for amendment adopted by the General Assembly in accordance with the provisions of the previous paragraph and of Article 28 shall be submitted by the Government of the French Republic for the acceptance of all the Governments Parties to this Convention. It shall come into force with regard to all Parties on the date on which four-fifths of them have notified their acceptance to the Government of the French Republic, except that a proposal for amendment of the present paragraph, of Article 16, or of the Annex referred to in that Article shall not come into force until all Parties have notified their acceptance to the Government of the French Republic.
4. Any Government which wishes to enter a reservation to its acceptance of an amendment shall inform the Bureau of the terms of this proposed reservation. The General Assembly shall give a decision concerning the admissibility of this reservation. It shall allow reservations which are conducive to the protection of established positions with regard to

international exhibitions and reject those which would have the effect of creating privileged positions. If the reservation is accepted, the Party which had submitted it shall be included among those which are counted as having accepted the amendments for the purpose of calculating the above-mentioned four-fifths majority. If it is rejected, the Government which had submitted it shall choose between refusal to accept the amendment and its acceptance without reservation.

5. When the amendment comes into force, in the circumstances envisaged in the third paragraph of the present article, any Contracting Party which had refused to accept it may, if it sees fit, avail itself of the provisions of Article 37 below.

#### **ARTICLE 34**

1. Any dispute between two or more Contracting Governments concerning the application or the interpretation of this Convention, which cannot be settled by the authorities invested with powers of decision in pursuance of the provisions of this Convention, shall form the subject of negotiations between the Parties in dispute.
2. If these negotiations do not within a short space of time lead to an agreement, any Party shall refer the matter to the President of the Bureau and shall request him to nominate a conciliator. If the conciliator is unable to obtain the agreement of the Parties in dispute on a solution, he shall take note of and define the nature and the extent of the dispute in his report to the President.
3. Once a lack of agreement is thus notified the dispute shall become the subject of arbitration. To this end any Party shall, within an interval of two months from the date on which the report was communicated to the Parties in dispute, refer to the Secretary General of the Bureau a request for arbitration, naming the arbitrator chosen by that Party. The other Party or Parties to the dispute must each nominate, within an interval of two months, their respective arbitrators. Failing this, any Party shall notify the President of the International Court of Justice, requesting him to nominate the arbitrator or arbitrators. When several Parties act in unison for purposes outlined in the preceding paragraph, they shall count as one entity. In case of doubt, the decision lies with the Secretary General. The arbitrators shall in their turn nominate an additional arbitrator. If the arbitrators cannot agree on this choice within a space of two months, the President of the International Court of Justice, having been notified by any one Party, shall be responsible for nominating the additional arbitrator.
4. The arbitrating body shall give its decision by the majority of its members, the additional arbitrator having the casting vote in the event of

the arbitrators' votes being equally divided. This decision shall be binding on all the Parties in dispute, finally and without the right of appeal.

5. Any State may, at the time of signing or ratifying this Convention, or acceding to it, declare itself not bound by the provisions of the above paragraphs 3 and 4. Other Contracting Parties will not be bound as regards those provisions towards any State which has so reserved its positions.
6. Any Contracting Party which has reserved its position in accordance with the provisions of the above paragraph, may at any time rescind its reservations by a notification to the depository Government.

### **ARTICLE 35**

This Convention shall be open for accession by any State which is a member of the United Nations, or any State which is not a member of the United Nations but which is a Party to the Statute of the International Court of Justice or any State which is a member of one of the specialised agencies of the United Nations or the International Atomic Energy Agency and also by any State whose application for accession is approved by a two-thirds majority of the Contracting Parties which have the right to vote in the General Assembly of the Bureau. Instruments of accession shall be deposited with the Government of the French Republic and shall become effective on the date they are so deposited.

### **ARTICLE 36**

The Government of the French Republic shall inform signatory and acceding Governments and also the Bureau International des Expositions of:

- a) the entry into force of amendments in accordance with Article 33;
- b) accessions in accordance with Article 35;
- c) denunciations in accordance with Article 37;
- d) reservations filed in accordance with Article 34 paragraph 5;
- e) the termination of the Convention, should this arise.

### **ARTICLE 37**

1. Any Contracting Government may denounce this Convention by notifying the Government of the French Republic in writing.

2. Such a denunciation shall take effect one year after the date of receipt of such notification.
3. This Convention shall terminate if, as the result of denunciations, the number of Contracting Governments is reduced to less than seven. Subject to any agreement which may be concluded between the Contracting Governments concerning the dissolution of the Bureau, the Secretary General shall be responsible for questions regarding liquidation. Unless the General Assembly decides otherwise, the assets shall be divided among the Contracting Governments in proportion to the subscriptions paid since they have been Parties of this Convention. If there are liabilities, these shall be taken over by the same Governments in proportion to the subscriptions fixed for the current financial year.

*DONE* at Paris, the 30th of November, 1972



## **ANNEX**

to the Convention done at Paris on 22nd of November 1928 relating to International Exhibitions, as amended and supplemented by the Protocols of the 10th of May 1948, the 16th of November 1966, the 30th of November 1972 and the Amendment of the 24th June 1982.

### **CUSTOMS REGULATIONS**

#### **FOR THE IMPORTATION OF ARTICLES BY THE PARTICIPANTS IN INTERNATIONAL EXHIBITIONS**

##### **ARTICLE 1 - Definitions**

For the application of the present Annex the following interpretations shall apply:

- a) "Import duties" means Customs duties and all other duties and taxes payable on or in connection with importation and shall include all excise duties and internal taxes chargeable on imported goods, but shall not include fees and charges, which are limited in amount to the approximate cost of the services rendered and do not represent an indirect protection to domestic products or a taxation of imports for fiscal purposes.
- b) "Temporary admission" means temporary importation free of import duties, and free of import prohibitions and restrictions, subject to re-exportation.

##### **ARTICLE 2**

Temporary admission shall be granted to:

- a) goods intended for display or demonstration at the exhibition;
- b) goods intended for use in connection with the display of foreign exhibitions at the exhibition, including:
  - I) goods necessary for the purpose of demonstrating foreign machinery or apparatus to be displayed,
  - II) construction materials, even in the raw state, decoration material and furnishings, and electrical equipment for the foreign pavilions and stands at the exhibition as well as for the premises assigned to the Section Commissioner-General of a foreign participating country,

- III) tools equipment used in construction and means of transport necessary for the work of the exhibition,
- IV) advertising or demonstration material which is demonstrably publicity material for the foreign goods exhibited at the exhibition, for example sound recordings, films and film slides, as well as apparatus for necessary use therewith;
- c) equipment including interpretation apparatus, sound recording apparatus and films of an educational, scientific or cultural character, intended to be used for the purposes of the exhibition.

### **ARTICLE 3**

The facilities referred to in paragraph 2 of this Annex shall be granted provided that:

- a) the goods are capable of identification on re-exportation;
- b) the Section Commissioner-General of the participating country, without being called upon to pay a deposit, guarantees the payment of the import duties to which the goods are liable in the event of their not being re-exported within the prescribed period after the closing of the exhibition; other guarantees provided for by the laws of the inviting country can be accepted at the request of the exhibitors (e. g. A.T.A. carnet inaugurated by the Convention of the Customs Co-operation Council of 6 December, 1961);
- c) the Customs authorities of the country of temporary importation are satisfied that the conditions of this Annex will be fulfilled.

### **ARTICLE 4**

Unless the national laws and regulations of the country of temporary importation so permit, goods granted temporary admission shall not, whilst they are the subject of the facilities granted under the present Annex, be loaned, or used in any way for hire or reward or be removed from the site of the exhibition. They shall be re-exported with a minimum period of delay and at the latest within three months after the close of the exhibition. The Customs authorities may, for valid reasons, extend this period within the limits laid down by the laws and regulations of the country of temporary importation.

### **ARTICLE 5**

- a) Notwithstanding the requirement of re-exportation laid down in Article 4, the re-exportation of perishable goods, badly damaged goods or goods of little value shall not be required provided that the goods are:

- I) subject to the import duties to which they are liable; or
  - II) abandoned free of all expense to the Exchequer of the country into which they were temporarily imported;
  - III) destroyed, under official supervision, without expense to the Exchequer of the country into which they were temporarily imported, as the Customs authorities may require. Furthermore, the re-exportation requirements shall not apply to goods whose destruction is required by the Section Commissioner-General concerned, but destruction must be under official supervision and without expense to the Exchequer of the country into which they were temporarily imported.
- b) Goods granted temporary admission may be disposed of otherwise than by re-exportation, and in particular may be taken into domestic use, subject to compliance with the conditions and formalities applicable under the laws and regulations of the country of temporary importation in respect of such goods imported directly from abroad.

## **ARTICLE 6**

Products obtained incidentally during the exhibition from temporarily imported goods, as a result of the demonstration of displayed machinery or apparatus, shall be subject to the provisions of Articles 4 and 5 of this Annex, in the same way as if they had been granted temporary admission, subject to the reservations in Article 7 below.

## **ARTICLE 7**

Import duties shall not be levied and import prohibitions and restrictions shall be waived, and where temporary admission has been granted, re-exportation shall not be required, in respect of the following goods, if their aggregate value and quantity are, in the opinion of the Customs authorities of the country of importation, reasonable having regard to the nature of the exhibition, the number of visitors to it and the extent of the exhibitor's participation:

- a) small samples (other than alcoholic beverages, tobacco goods and fuels) which are representative of foreign goods displayed at the exhibition, including such samples of foods and beverages, either imported in the form of such samples or produced at the exhibition from imported build materials, provided that:
  - I) they are supplied free of charge from abroad and are used solely for distribution free of charge to the visiting public at the exhibition, for individual use or consumption by the persons to whom they are distributed,

- II) they are identifiable as advertising samples and are individually of little value,
  - III they are unsuitable for commercial purposes and are, where appropriate, packed in quantities appreciably smaller than the smallest retail package, and
  - IV) samples of foods and beverages which are not distributed in packs as provided for in (III) above, are consumed at the exhibition;
- b) imported samples used or consumed by the juries at the exhibition in appraising or judging articles displayed, subject to the production of a certificate from the Section Commissioner-General mentioning the nature and the quantity of the samples so used or consumed;
  - c) goods imported solely for demonstration or for the purpose of demonstrating the operation of a foreign machine or apparatus displayed at the exhibition and consumed or destroyed in the course of such demonstrations;
  - d) printed matter, catalogues, trade notices, price lists, advertising posters, calendars, whether or not illustrated, and unframed photographs, which are demonstrably publicity material for the foreign goods displayed at the exhibition, provided that they are supplied free of charge from abroad and are used solely for distribution free of charge to the visiting public at the exhibition.

## **ARTICLE 8**

Import duties shall not be levied, and import prohibitions and restrictions shall be waived, and where temporary admission has been granted, re-exportation shall not be required, in respect of the following goods:

- a) products which are imported and which are used up in constructing, setting up, decorating, animating, or furnishing the stands of foreign exhibitors at the exhibition, such as paint, varnish, wall-paper, rectified spirit, fireworks, seeds, plants, etc. which are disposed of by the use to which they are put;
- b) official catalogues, leaflets, posters and other printed matter, whether or not illustrated, which are published by the countries participating in the exhibition;
- c) plans, drawings, files, records, forms and other documents which are imported for use as such at the exhibition.

**ARTICLE 9**

- a) Both on entry and on exit, the examination and clearance of goods which are going to be exhibited or used or which have been exhibited or used at an exhibition shall be carried out, whenever possible and convenient, at the site of this exhibition.
- b) Each Contracting Party shall endeavour, whenever it considers this useful, taking into consideration the importance of the exhibition, to open for a reasonable period a Customs office on the site of the exhibition held in its territory.
- c) The re-exportation of goods which were imported temporarily may take place in one or several instalments and through any Customs office which is open for this purpose, even if it is different from the office of importation, unless the importer undertook to re-export the goods through the office of importation in order to have the benefit of a simplified procedure.

**ARTICLE 10**

Nothing in these regulations shall prevent the application of:

- a) more extensive facilities which Contracting Parties grant or may grant either by unilateral agreement, or by virtue of bilateral or multilateral agreements,
- b) regulations, whether national or made by agreement, concerning the organisation of the exhibition which are not concerned with Customs matters,
- c) prohibitions and restrictions arising from national laws and regulations and concerned with public morality or conduct, public security, public hygiene or health, or with veterinary or phytopathological matters, or with the protection of patents, trade marks, authors' rights and copyright.

**ARTICLE 11**

For the purpose of the present Annex the territories of the Contracting Countries which form a Customs or economic union can be considered as a single territory.

**RECOMMANDATION**

The General Assembly recommends that import duties should not be levied and import prohibitions and restrictions shall be waived and where temporary admission has been granted, re-exportation shall not be required, if their aggregate value and quantity are, in the opinion of the Customs authorities of the country of importation, taking into consideration the nature of the exhibition, the number of visitors and the extent of the exhibitors' participation for the products imported by the Commissioner Generals of Section for:

- I) their personal use;
- II) being used during official receptions;
- III) being offered to VIP visitors of their own country, host country or those coming from another country.

## DECLARATIONS AND RESERVATIONS

### BULGARIA

Reservation:

"The People's Republic of Bulgaria does not regard itself as being bound by the provisions of paragraphs 3 and 4 of Article 34 of the Convention".

Declaration:

"All the countries of the world enjoy absolute equality and have the right to accede to this Convention irrespective of the restrictions deriving from Article 35 of the Convention".

### BYELORUSSIAN SOVIET SOCIALIST REPUBLIC

Reservation:

"The Government of the Byelorussian Soviet Socialist Republic does not regard itself as being bound by the provisions concerning arbitration, paragraphs 3 and 4 of Article 34" of the Convention.

Declaration:

"The Government of the Byelorussian Soviet Socialist Republic hereby declares that the provisions of Article 35 of the amended Convention according to which a certain number of States are debarred from becoming parties to the Convention are of a discriminatory nature and it considers that the Convention should be open to participation by all the States concerned without any discrimination or restrictions whatsoever, in accordance with the sovereign law of States".

### HUNGARY

Reservation:

"The Hungarian party does not regard paragraphs 3 and 4 of Article 34 of the Protocol as being obligatory in respect of itself".

## POLAND

Reservation referring to Article 35 of the Convention:

"The Government of the Polish People's Republic hereby declares that it does not regard itself as being bound by the provisions of Article 34, paragraphs 3 and 4 of this Convention".

Declaration:

"The Government of the Polish People's Republic is of the opinion that this Convention should be open to accession by any State".

## RUMANIA

Reservation:

"The Socialist Republic of Rumania hereby declares, with regard to Article 34, paragraph 5 of the Convention relating to international exhibitions signed at Paris on 22<sup>nd</sup> November 1928, that it does not regard itself as being bound by the provisions of paragraphs 3 and 4 of Article 34 of the Convention. The position of the Socialist Republic of Rumania is that disputes between two or more Contracting Parties relating to the interpretation or the implementation of the Convention which have not been settled by means of negotiations may be subject to arbitration only with the agreement of all the Parties in dispute, in each particular case".

Declaration:

"The Government of the Socialist Republic of Rumania hereby declares that the provisions of Article 35 of the Convention relating to international exhibitions, signed at Paris on 22<sup>nd</sup> November 1928, are not in conformity with the principle according to which international multi-lateral treaties, whose purpose and goal are of interest to the entire international community, should be open to universal participation".

## UKRAINIAN SOVIET SOCIALIST REPUBLIC

Reservation:

"The Government of the Ukrainian Soviet Socialist Republic does not regard itself as being bound by the provisions concerning arbitration in paragraphs 3 and 4 of Article 34" of the Convention.



Declaration:

"The Government of the Ukrainian Soviet Socialist Republic hereby declares that the provisions of Article 35 of the amended Convention according to which a certain number of States are debarred from becoming parties to the Convention are of a discriminatory nature and it considers that the Convention should be open to participation by all the States concerned without any discrimination or restriction whatsoever, in accordance with the principles of the sovereign law of States".

UNITED STATES OF AMERICA

Reservation:

"The signature by the United States Government is being accompanied by a reservation with respect to paragraph (2) of Article 10. This reservation accords with the position consistently stated by the United States Government in meetings of the Bureau of International Expositions and in the drafting of general rules regarding expositions in the United States that, while the United States Government guarantees the fulfilment of its own obligations, it is not in a position under its law to guarantee the fulfilment of obligations by juristic persons recognised by it for the purpose of organising expositions. The United States Government will nevertheless make every reasonable effort to ensure the fulfilment by such organisers of their obligations".

UNION OF SOVIET SOCIALIST REPUBLICS

Reservation:

"The Government of the USSR does not regard itself as being bound by the provisions concerning arbitration in paragraphs 3 and 4 of Article 34" of the Convention.

Declaration:

"The Government of the USSR hereby declares that the provisions of Article 35 of the amended Convention according to which a certain number of States are debarred from becoming parties to the Convention are of a discriminatory nature and it considers that the Convention should be open to participation by all the States concerned without any discrimination or restriction whatsoever, in accordance with the principles of the sovereign law of States".

CZECHOSLOVAKIA

Reservation:

"The Government of the Socialist Republic of Czechoslovakia does not regard itself as being bound by the provisions of Article 34, paragraphs 3 and 4 of the Convention".

25.07.1974

GERMAN DEMOCRATIC REPUBLIC

Reservation:

"The Government of the Democratic Republic of Germany does not regard itself as being bound by the provisions of Article 34, paragraphs 3 and 4 of the Convention".

Declaration:

"The Government of the Democratic Republic of Germany is of the opinion that this Convention should be open to accession by any State".

16.12.1975

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## Appendix F: Themes of 2020 Candidate Cities

## Dubai



## Izmir



## Sao Paulo



## Yekaterinburg

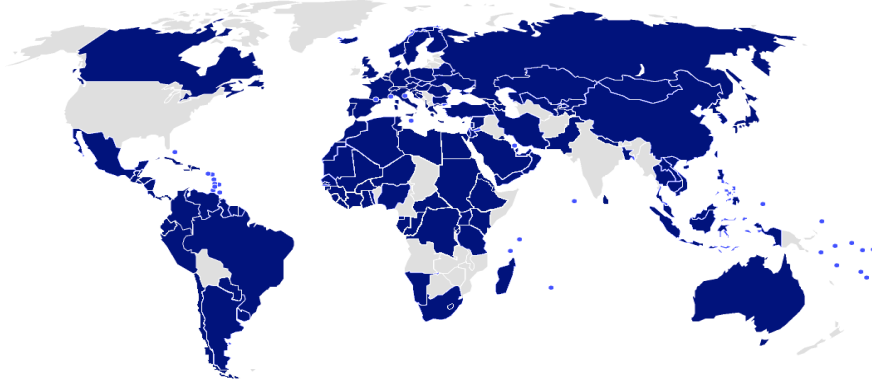


## Appendix G: BIE Members



# BIE MEMBER STATES

167 MEMBER STATES

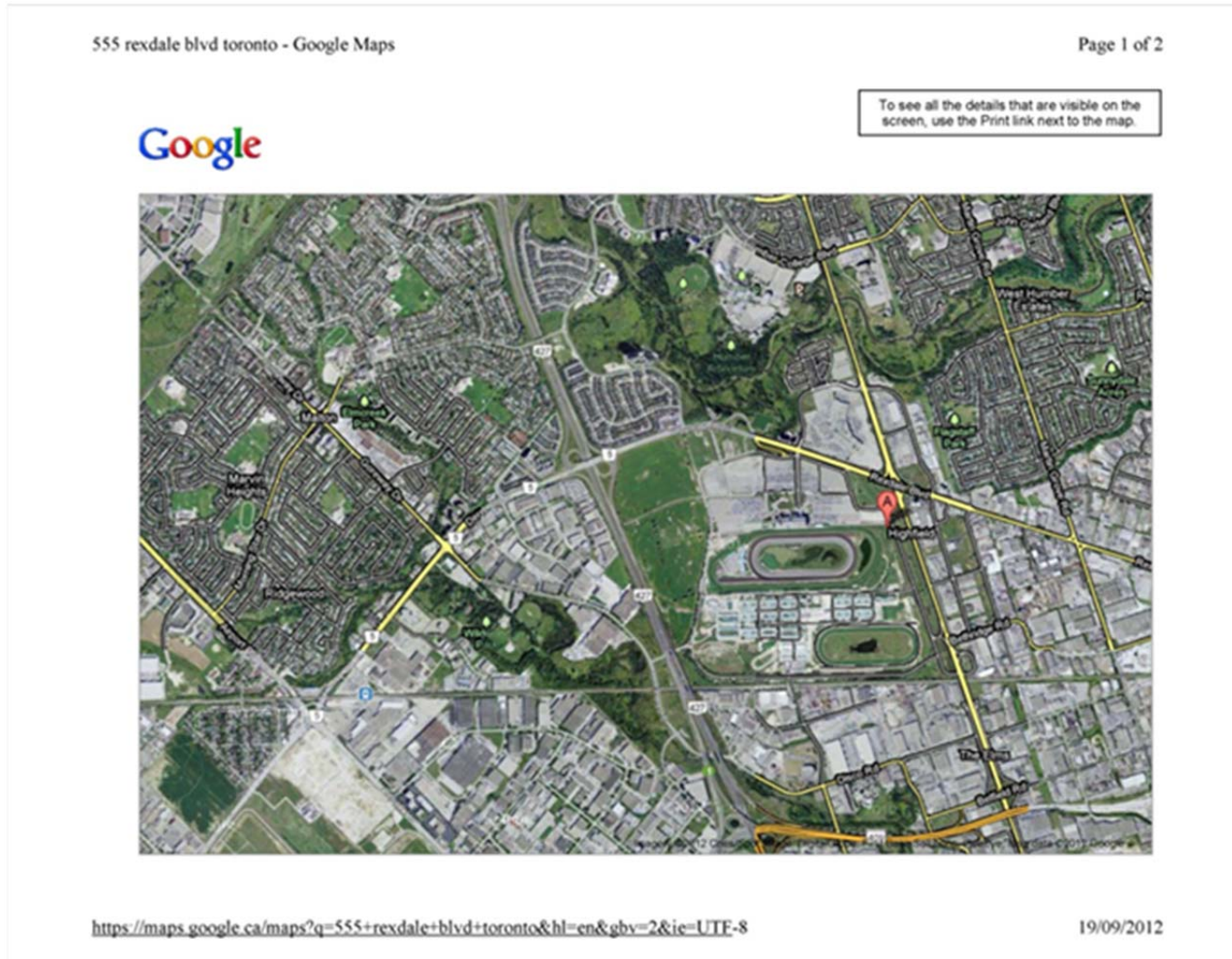


<b>A</b> FGHANISTAN	<b>E</b> CUADOR	<b>L</b> LITHUANIA	<b>S</b> T. VINCENT AND THE GRENADINES
<b>A</b> LBANIA	<b>E</b> GYPT		<b>S</b> AMOA
<b>A</b> LGERIA	<b>E</b> L SALVADOR	<b>M</b> ADAGASCAR	<b>S</b> AN MARINO
<b>A</b> NDORRA	<b>E</b> QUATORIAL GUINEA	<b>M</b> ALAYSIA	<b>S</b> AUDI ARABIA
<b>A</b> NGOLA	<b>E</b> RITREA	<b>M</b> ALDIVES	<b>S</b> ENEGAL
<b>A</b> NTIGUA AND BARBUDA	<b>E</b> STONIA	<b>M</b> ALI	<b>S</b> ERBIA
<b>A</b> RGENTINA		<b>M</b> ALTA	<b>S</b> EYCHELLES
<b>A</b> RMÉNIA	<b>F</b> IJI	<b>M</b> ARSHALL ISLANDS	<b>S</b> IERRA LEONE
<b>A</b> USTRALIA	<b>F</b> INLAND	<b>M</b> AURITANIA	<b>S</b> LOVAKIA
<b>A</b> USTRIA	<b>F</b> RANCE	<b>M</b> AURITIUS	<b>S</b> LOVENIA
<b>A</b> ZERBAIJAN		<b>M</b> EXICO	<b>S</b> OLOMON ISLANDS
	<b>G</b> ABON	<b>M</b> ONACO	<b>S</b> OMALIA
<b>B</b> AHAMAS	<b>G</b> AMBIA	<b>M</b> ONGOLIA	<b>S</b> OUTH AFRICA
<b>B</b> AHRAIN	<b>G</b> EORGIA	<b>M</b> ONTENEGRO	<b>S</b> PAIN
<b>B</b> ANGLADESH	<b>G</b> ERMANY	<b>M</b> OROCCO	<b>S</b> RI LANKA
<b>B</b> ARBADOS	<b>G</b> HANA	<b>M</b> OZAMBIQUE	<b>S</b> UDAN
<b>B</b> ELARUS	<b>G</b> REAT BRITAIN		<b>S</b> URINAM
<b>B</b> ELGIUM	<b>G</b> REECE	<b>N</b> AMIBIA	<b>S</b> WAZILAND
<b>B</b> ELIZE	<b>G</b> RENADA	<b>N</b> AURU	<b>S</b> WEDEN
<b>B</b> ENIN	<b>G</b> UATEMALA	<b>N</b> EPAL	<b>S</b> WITZERLAND
<b>B</b> OSNIA & HERZEGOVINA	<b>G</b> UINEA	<b>N</b> ETHERLANDS	<b>S</b> YRIAN ARAB REPUBLIC
<b>B</b> RAZIL	<b>G</b> UINEE-BISSAU	<b>N</b> EW ZEALAND	
<b>B</b> ULGARIA	<b>G</b> UYANA	<b>N</b> ICARAGUA	<b>T</b> AJIKISTAN
<b>B</b> URKINA FASO		<b>N</b> IGER	<b>T</b> HAILAND
<b>B</b> URUNDI	<b>H</b> AITI	<b>N</b> IGERIA	<b>T</b> IMOR-LESTE
	<b>H</b> ONDURAS	<b>N</b> ORWAY	<b>T</b> OGO
<b>C</b> AMBODIA	<b>H</b> UNGARY		<b>T</b> ONGA
<b>C</b> ANADA		<b>O</b> MAN	<b>T</b> UNISIA
<b>C</b> ENTRAL AFRICAN REPUBLIC	<b>I</b> CELAND		<b>T</b> URKEY
<b>C</b> HILE	<b>I</b> NDONESIA	<b>P</b> AKISTAN	<b>T</b> URKMENISTAN
<b>C</b> HINA	<b>I</b> RAN	<b>P</b> ALAU	<b>T</b> UVALU
<b>C</b> OLOMBIA	<b>I</b> SRAEL	<b>P</b> ANAMA	
<b>C</b> OMOROS	<b>I</b> TALY	<b>P</b> ARAGUAY	<b>U</b> GANDA
<b>C</b> ONGO		<b>P</b> ERU	<b>U</b> KRAINE
<b>C</b> OSTA-RICA	<b>J</b> APAN	<b>P</b> HILIPPINES	<b>U</b> NITED ARAB EMIRATES
<b>C</b> OTE D'IVOIRE	<b>J</b> ORDAN	<b>P</b> OLAND	<b>U</b> NITED REPUBLIC OF TANZANIA
<b>C</b> ROATIA		<b>P</b> ORTUGAL	<b>U</b> RUGUAY
<b>C</b> UBA	<b>K</b> AZAKHSTAN		<b>U</b> ZBEKISTAN
<b>C</b> YPRUS	<b>K</b> ENYA	<b>Q</b> ATAR	
<b>C</b> ZECH REPUBLIC	<b>K</b> INGDOM OF LESOTHO		<b>V</b> ANUATU
	<b>K</b> IRGHIZISTAN	<b>R</b> EP. OF CHAD	<b>V</b> ENEZUELA
<b>D</b> EMOCRATIC PEOPLE'S REP. OF KOREA	<b>K</b> IRIBATI	<b>R</b> EP. OF KOREA	<b>V</b> IETNAM
<b>D</b> EMOCRATIC REP. OF CONGO	<b>K</b> UWAIT	<b>R</b> EP. OF MALAWI	
<b>D</b> ENMARK		<b>R</b> OMANIA	<b>Y</b> EMEN
<b>D</b> JIBOUTI	<b>L</b> AO PEOPLE'S DEM. REP.	<b>R</b> USSIA	
<b>D</b> OMINICA	<b>L</b> EBANON	<b>R</b> WANDA	
<b>D</b> OMINICAN REPUBLIC	<b>L</b> IBERIA		<i>September 2013</i>
	<b>L</b> IBYA	<b>S</b> T. KITTS AND NEVIS	
		<b>S</b> T. LUCIA	

*This Convention shall be open for accession by any State which is a member of the United Nations, or any State which is not a member of the United Nations but which is a Party to the Statute of the International Course of Justice or any State which is a member of one of the specialised agencies of the United Nations or the International Atomic Energy Agency and also by any State whose application for accession is approved by a two-thirds majority of the Contracting Parties which have the right to vote in the General Assembly of the Bureau. Instruments of accession shall be deposited with the Government of the French Republic and shall become effective on the date they are so deposited. BIE Convention, Art. 35*

## Appendix H: Site Maps

Woodbine Racetrack



Exhibition Place

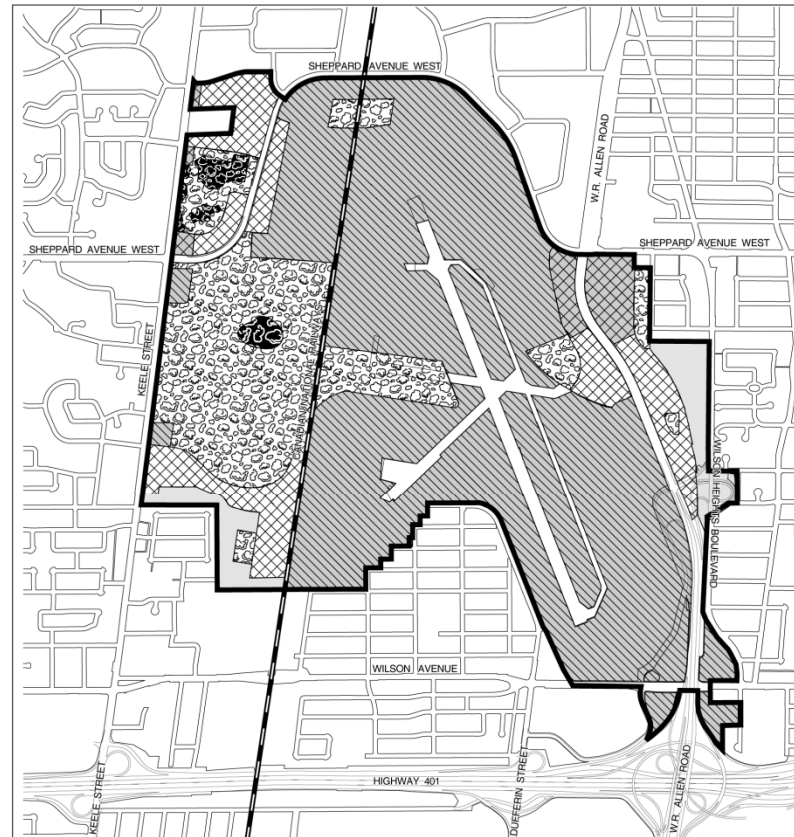


Toronto Port Lands



Downsview

SCHEDULE 'II'



Downsview Area Secondary Plan

**TORONTO** City Planning  
**Official Plan Amendment**  
 Revisions to Land Use Map 16

File # 08\_101113

- |                          |                          |
|--------------------------|--------------------------|
| Site Location            | Employment Areas         |
| Neighbourhoods           | Parks & Open Space Areas |
| Apartment Neighbourhoods | Natural Areas            |
| Mixed Use Areas          | Parks                    |

↑  
 Not to Scale  
 02/12/2010

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