



### Overall performance

Canada's infrastructure planning and procurement processes rank among the best in the world. Having sub-national infrastructure authorities responsible for infrastructure governance and regulation, combined with a high quality administrative and legal system, have helped promote quality project planning and delivery in Canada. However, sluggish GDP growth and rising public debt levels threaten to further decrease Canada's infrastructure expenditure. The long-term impact of the COVID-19 pandemic on infrastructure investment levels remains an outstanding question.

Drivers	Rank (/16)	Rank change (2017-20)	Score (/100)	Emerging	Aspiring	Contender	Top performer	Global leader
Governance	4	↓ 2	82	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Regulatory frameworks	12	↓ 3	75	Green	Green	Green	Green	Light Blue
Permits	12	↓ 4	86	Blue	Blue	Blue	Blue	Blue
Planning	3	—	98	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Procurement	8	↑ 4	93	Light Green	Light Green	Light Green	Light Green	Light Green
Activity	37	—	36	Teal	Teal	Light Blue	Light Blue	Light Blue
Funding capacity	12	↓ 2	75	Orange	Orange	Orange	Orange	Light Blue
Financial markets	6	↑ 3	76	Yellow	Yellow	Yellow	Yellow	Light Blue

### Canada at a glance

**\$46,213**  
GDP per capita  
(USD, 2019)

**37.5 million**  
Population  
(2019)

**2.5% of GDP**  
Infrastructure investment  
(2019 estimate)

**0% of GDP**  
Infrastructure gap  
(2019 estimate)

**80.8**  
Infrastructure quality  
(0-100, 100 is best, 2019)

**\$7,534 million**  
Private infrastructure investment  
(5-year average, USD, 2019)

### Top performing metrics



100/100

#### Transparency in public procurement

Public procurement processes are governed by rigorous legislative, regulatory and policy measures. The Government of Canada is one of the largest public buyers of goods and services in Canada, purchasing approximately CAD 22 billion annually.



99.4/100

#### Cost to start a business

According to the World Bank, the cost to start a business is 0.3% of income per capita, the lowest in the Americas, easing the entry of new firms.



99/100

#### Summary credit rating

Canada is AAA-rated by four international credit rating agencies, with a stable outlook. Canada's high credit worthiness provides favourable borrowing costs for infrastructure investments, but could be impacted by the COVID-19 pandemic.

### Opportunities to grow



16/100

#### Long term GDP growth trend

Long-term GDP growth in Canada is projected to be lower than past performance, partially due to declining levels of business investment and increasing levels of household debt. Canada has a strong reliance on its energy sector and falling oil prices are contributing to slower economic growth.



21.1/100

#### Dealing with construction permits

According to the World Bank, it takes an average of 249 days to obtain construction permits, the third longest of all High Income Countries. Expediting this process could significantly impact investment in infrastructure by helping to reduce delays.



31.5/100

#### Gross government debt

Canada's gross government debt sits at 87% of GDP and is higher than the High Income Countries average of 74% of GDP. Considering the impacts of the COVID-19 pandemic, this may hinder Canada's ability to invest in infrastructure.

For guidance on how to improve these metrics, please see the [Canada Country Page](#) on the InfraCompass website.



## ECONOMY OVERVIEW

GDP (\$US billion, 2019)	1730.9	Population (million, 2019)	37.5	Unemployment rate (2019)	6.1%
GDP per capita (\$US, 2019)	46,213	Urbanisation ratio (2018)	81.0%	Inflation rate (2019)	2.0%
GDP growth rate (annual, 2019)	1.5%	Gross Government Debt (% of GDP, 2019)	88.0%	Digital Adoption Index (0-1 best, 2016)	0.69
GDP per capita growth rate (annual, 2019)	-0.2%	Sovereign risk rating (2019)	99	Gini coefficient (0-100 worst, 2013)	34

## METRIC SCORES

The below metrics are normalised so that they all range from 0 to 100. For original metrics and data sources, please see <https://infracompass.github.org/>

GOVERNANCE		REGULATORY FRAMEWORKS		PERMITS	
Post-completion reviews?	Yes -	Effect of taxation on incentives to invest	48.9 ↓	Cost to start a business	99.4 ↑
Infrastructure or PPP unit/agency?	Yes -	Prevalence of foreign ownership	74.3 ↓	Dealing with construction permits	21.1 -
Recovery rate	86.7 ↓	Product market regulation, network sectors	66.5 -	Quality of land administration	71.7 -
Rule of law	85.4 ↓	Regulatory (including competition) quality	83.3 ↓	Registering property	96.4 -
Shareholder governance	53.3 -	Strength of insolvency framework	68.8 -	Time required to start a business	96.7 -
Political stability and absence of violence	66.5 ↓	Investment promotion agency?	Yes -		
PLANNING		PROCUREMENT		ACTIVITY	
Published project pipeline?	Yes -	Average procurement duration – transaction RFP	79.7 ↑	Infrastructure investment	29.5 ↑
Published infrastructure plan?	Yes -	Degree of transparency in public procurement	100 ↑	Private infrastructure investment	43.8 ↓
Preparation of PPPs	90 ↑	Published procurement guidelines?	Yes -	Value of closed PPP infrastructure deals	53.4 ↑
Economic analysis assessment?	Yes -	Procurement of PPPs	76 -	Value of closed infrastructure deals with foreign equity sponsorship	17.6 ↑
Market sounding and/or assessment?	Yes -	PPP contract management	61 -		
Environmental impact analysis?	Yes -				
FUNDING CAPACITY		FINANCIAL MARKETS		<b>Drawing on data from:</b> International Monetary Fund, Organisation for Economic Co-operation and Development, World Bank, World Economic Forum, IJ Global, CEPII, Oxford Economics, Trading Economics, and Deloitte.	
GDP per capita	59 ↑	Domestic credit to private sector	73.3 <sup>^</sup> ↑		
Gross government debt	31.5 ↑	Financing through local equity market	70.8 ↑		
Long term GDP growth trend	16 ↑	Stocks traded	72.8 ↑		
Summary credit rating	99 -	Financial depth	79.5 ↓		
		Financial stability	94.5 ↓		

**Metric key:**

↑ Increase from InfraCompass 2017    ↓ Decrease from InfraCompass 2017    - No change from InfraCompass 2017

**Note:**

'Top performing metrics' are the metrics with the highest score out of 100.

'Opportunities to grow' are generally the metrics with the lowest weighted score out of 100.

<sup>^</sup>Denotes interpolated metric data. See Technical Appendix for further explanation on the interpolation techniques.