







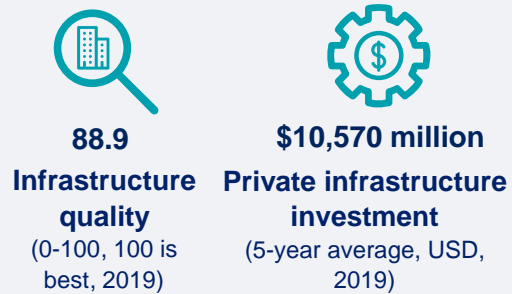
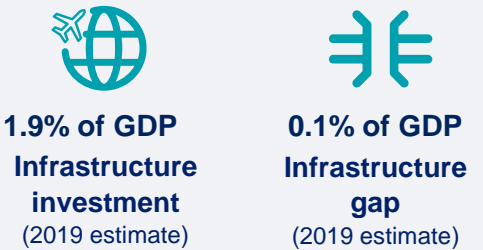
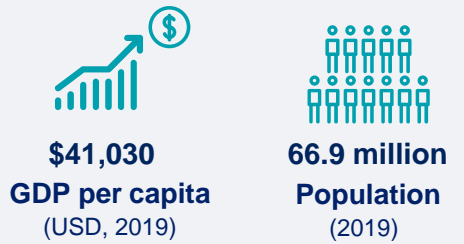


## Overall performance

The United Kingdom is a world leader in infrastructure regulation and planning. National level infrastructure plans, detailed PPP preparation and economic impact assessments help the United Kingdom deliver infrastructure projects efficiently. In addition, the quality of the United Kingdom's infrastructure governance systems and financial markets help to attract investment in infrastructure and improve project outcomes. However, significant government debt, low long-term GDP growth and the potential economic fallout from BREXIT and the COVID-19 pandemic presents challenges to the United Kingdom's ability to fund infrastructure investment.

Drivers	Rank (1/16)	Rank change (2017-20)	Score (1/100)	Emerging	Aspiring	Contender	Top performer	Global leader
 Governance	11	↓ 4	79	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
 Regulatory frameworks	1	—	81	Green	Green	Green	Green	Green
 Permits	7	↓ 1	89	Blue	Blue	Blue	Blue	Blue
 Planning	1	—	99	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
 Procurement	12	↓ 9	92	Cyan	Cyan	Cyan	Cyan	Cyan
 Activity	49	↓ 19	28	Teal	Teal	Light Blue	Light Blue	Light Blue
 Funding capacity	15	↓ 2	68	Orange	Orange	Orange	Orange	Light Blue
 Financial markets	4	—	77	Yellow	Yellow	Yellow	Yellow	Light Blue

## United Kingdom at a glance



## Top performing metrics



100/100

### Cost to start a business

According to the World Bank, there are no costs associated with starting a business in the United Kingdom, easing the entry of new firms.



100/100

### Transparency in public procurement

The United Kingdom's public procurement notices are made available online and tender documents detail both procurement procedures and shortlisting criteria. The transparency of the process encourages more participation and competition.



96/100

### Preparation of PPPs

At 96, the United Kingdom's score on the preparation of PPPs is much higher than the High Income Countries average of 67. Good practices at the preparation stage help ensure that a decision is justified and that the procuring authority is ready to initiate the process.

## Opportunities to grow



12.2/100

### Long term GDP growth trend

The United Kingdom's long-term GDP growth trend is 1.3%, below the High Income Countries' average of 1.8%. Long-term growth rates signal a country's capacity to fund infrastructure from future growth. The COVID-19 pandemic may impact GDP growth trends.



17/100

### Average procurement duration – transaction RFP

At 53 months, the United Kingdom has one of the highest periods of time between the public announcement of a tender and the awarding of a contract of all InfraCompass 2020 countries. Lengthy procurement processes add costs, risks and down time for infrastructure contractors.



33/100

### Gross government debt

The United Kingdom's gross government debt sits at 86% of GDP, above the average of 74% for High Income Countries. The impacts of the COVID-19 pandemic on debt levels may hinder the UK government's ability to fund infrastructure.

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



## ECONOMY OVERVIEW

GDP (\$US billion, 2019)	2743.6	Population (million, 2019)	66.9	Unemployment rate (2019)	3.8%
GDP per capita (\$US, 2019)	41,030	Urbanisation ratio (2018)	83.0%	Inflation rate (2019)	1.8%
GDP growth rate (annual, 2019)	1.2%	Gross Government Debt (% of GDP, 2019)	86.0%	Digital Adoption Index (0-1 best, 2016)	0.76
GDP per capita growth rate (annual, 2019)	-3.6%	Sovereign risk rating (2019)	92	Gini coefficient (0-100 worst, 2015)	33.2

## 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	60.5 ↑	Cost to start a business	100 ↑
Infrastructure or PPP unit/agency?	Yes -	Prevalence of foreign ownership	85.7 ↓	Dealing with construction permits	72.7 -
Recovery rate	85.4 ↓	Product market regulation, network sectors	86 -	Quality of land administration	86.7 ↑
Rule of law	82.8 ↓	Regulatory (including competition) quality	85.2 ↑	Registering property	80.8 -
Shareholder governance	56.7 -	Strength of insolvency framework	68.8 -	Time required to start a business	90.1 -
Political stability and absence of violence	50.8 ↓	Investment promotion agency?	Yes -		
PLANNING		PROCUREMENT		ACTIVITY	
Published project pipeline?	Yes -	Average procurement duration – transaction RFP	17 ↓	Infrastructure investment	23.9 ↑
Published infrastructure plan?	Yes -	Degree of transparency in public procurement	100 -	Private infrastructure investment	35 ↓
Preparation of PPPs	96 ↑	Published procurement guidelines?	Yes -	Value of closed PPP infrastructure deals	10.8 ↓
Economic analysis assessment?	Yes -	Procurement of PPPs	86 -	Value of closed infrastructure deals with foreign equity sponsorship	41.4 ↓
Market sounding and/or assessment?	Yes -	PPP contract management	71 -		
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	52.3 ↑	Domestic credit to private sector	64.8 ↑		
Gross government debt	33 ↑	Financing through local equity market	77.8 ↑		
Long term GDP growth trend	12.2 ↑	Stocks traded	81 <sup>^</sup> ↓		
Summary credit rating	92 ↓	Financial depth	83.3 ↑		
		Financial stability	93.5 ↑		

**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.