



For a bigger, bolder Canada

LONG-TERM THINKING.
STARTING NOW.



ABOUT THIS REPORT

For a Bigger, Bolder Canada offers a vision for our country in 2100. We believe that, if Canada has 100 million people and the right support mechanisms for those people, it will be a country that is prosperous, inclusive and influential, building on its strengths and fulfilling its potential. It is by no means inevitable that we will get there. The future we desire will require a willingness among Canadians to bring a long-term lens to our biggest current challenges, meeting them with bold, forward-looking policies and significant investment to match. It will require leadership. And, it will require a series of national strategies to get us to our goal.

Canada is physically vast with a relatively small and aging population.^{1,2} Our long-term success depends on our ability to scale our population over the course of this century while ensuring that infrastructure development, social programs and public support for this expansion keep pace. This is an ambitious but vital national challenge, one that -- if successfully met -- can make Canada an even better place to live, and an example to the world.

This report offers a framework for thought, discussion and action around 10 issues that must be addressed now if Canada is to achieve the scale needed for longer-term prosperity. We need an open discussion, focusing on facts, around the economic and social elements of Canada's growth. And we need to see population growth as part of a wider reckoning about the future of Canada's workforce, its education system and infrastructure. Because to achieve distant goals, we have to start now.

ABOUT CENTURY INITIATIVE

Century Initiative (CI) is a national non-partisan organization with a mission to enhance Canada's long-term prosperity through bigger and bolder thinking, imagination and action. To that end, CI provides research and education, creates opportunities to engage and share viewpoints, and contributes to public policy and solutions design. CI's current areas of focus are: immigration, urban development, early childhood support, employment & entrepreneurship and education. We seek to broaden the conversation on Canada's future, and to work with others on actionable strategies.

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I. CANADA'S CHOICE

Introduction

A Fast-Changing World

Canadians have much to be grateful for. Our country is, overall, a prosperous place to live.^{3,4} We are at peace. In a volatile age this enduring commitment to prosperity, stability and inclusion makes Canada a beacon to millions of people around the world. At home it contributes to a shared sensibility about what it means to be Canadian⁵, one we broadly cherish even as we quarrel over the details.

The values that define that Canadian identity cannot be taken for granted. They arose from a combination of historical good fortune (a single shared border with a largely benevolent and immensely rich neighbour) and vast economic resources which, over generations, generated the wealth that underwrote the kind of society we chose to build. We were blessed. And we made good on those blessings.

But history moves along and the 21st century has brought with it constant and rapid change. Global economic power is shifting, most notably to a re-emerging Asia.^{6,7} The digital era has swamped the analogue one, with new technologies upending the ways we conduct commerce and manufacture things, altering everything from our energy patterns to the ways we travel. Around the world, people are on the move – and the challenges and opportunities of global migration are at the center of heated national policy debates.^{8,9}

These forces of change bring to the fore new questions about Canada's place in the world and the realities rooted in our national standing: a large country with a relatively small and aging population, facing a wider world in flux. The drift from the certainties of the past raises urgent questions about the long-term prospects for a country of 37 million people.¹⁰

We believe a key driver of future economic prosperity and a good standard of living will be Canada's scale: our population size, its composition and distribution, and the critical social and structural elements required to make population growth manageable and successful. That's why we believe that putting Canada on track for a population of 100 million Canadians in 2100 should be central to Canada's bold response to this century's challenges.

A larger population is key for the economic prosperity that makes possible what we value, from high-quality healthcare and education to income security programs, cultural vibrancy and a healthy environment. We realize that active measures to increase Canada's scale will run into the headwinds of current countervailing political forces that reflect a more skeptical public mood.^{11, 12} This report recognizes that making the case for a bigger Canada requires strategic foresight for policies that can provide the social license for such an expansion, notably action to lower barriers to participation in Canada's labour force by under-represented groups, investment in public infrastructure to ensure we have cities that work and educational policies that prepare all Canadians for the jobs of the future.

There is one thing we can be sure of: where we end up will depend on the choices we make now. We have a responsibility to set Canada up for success, for the benefit of those not yet born, because large-scale change has big lead times.

And because there are many plausible alternatives of the future.

SCENARIO A

Future Canada: The Business-As-Usual Path



Canada's demography will change over the next few decades. The foremost factor is the aging of the population. As the large baby-boom cohort ebbs out of the workforce into retirement, economic growth will slow. At the same time, costs will increase significantly for public services, including health care, education and Old Age Security.

The Conference Board of Canada, A Long-Term View of Canada's Changing Demographics¹³

Here's one scenario of how the world could look in 2100.

Despite a decades-long decline in global fertility rates¹⁴, it is predicted that the world's population will approach the 11.2 billion mark at the turn of the next century, from 7.6 billion today.¹⁵

Much of that rise will be driven by high birth rates and longer lives in many African countries, as well as growing populations in Asia. But among the top ten fastest growing countries in the decades ahead will be our neighbour, the United States, which will have an estimated population of more than 450 million by 2100.¹⁶

Canada will have 49.7 million people in 2100. That would make us the 48th largest country by population in the world, down from the current 38th¹⁷, a lower-to-mid-ranking country a fraction the size of behemoths like India (its 1.66 billion people will rank first by then) and China.

By the turn of the next century, the average life expectancy for a child born in Canada, balanced for both sexes, will be 91.6 years.¹⁸ Our fertility rate is projected to be just slightly higher than it is now at 1.54, but still well-below the replacement level of 2.1. This Canada will be a country of older people.¹⁹

An aging society carries economic implications. Assuming the current pace of immigration is maintained, Canada's GDP growth is expected to slow to 1.6% by 2050, and average just 1.5% from 2050 to 2100.²⁰ In contrast, over the last 50 years Canada's GDP growth has averaged 2.8%.²¹ That cut in GDP growth signals a smaller Canada in the global context, relatively poorer and less influential on the world stage.

Find projections for life in 2100 a little too remote to grasp? Think they're too susceptible to unanticipated events – for example, a global pandemic that renders current demographic forecasting ridiculously off-track?

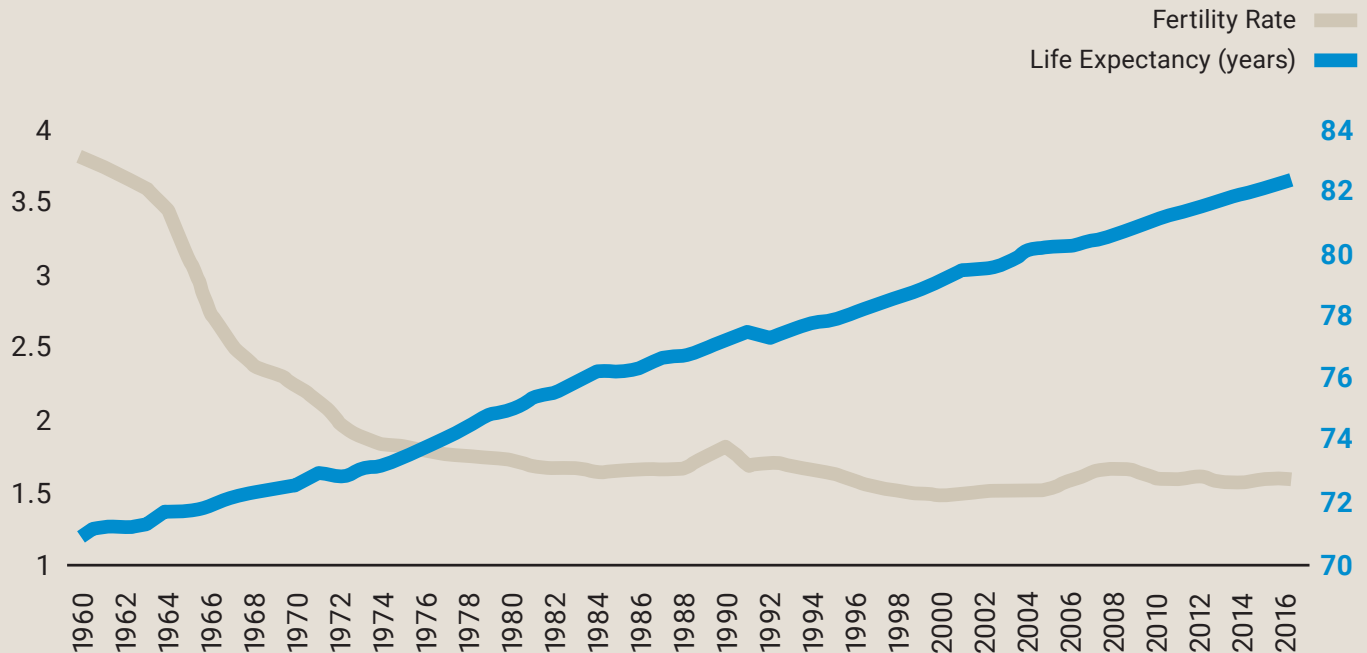
Then let's look at what the math tells us about Canada in the nearer future.

Already, our population is rapidly aging. The life expectancy at birth of the average Canadian is now 82.5 years, compared to 71 years in 1960²², and, as we've seen, continuing improvements in public health and medicine will likely further extend lifespans.

Meanwhile the fertility rate of Canadian women (the number of children a woman has in her lifetime) is only 1.54, well below the population replacement rate of 2.1.²³ This is a massive decline from 1960 when the fertility rate was slightly over 3.9.²⁴

Canadian Fertility Rate and Life Expectancy

(World Bank, 2018)



The result of longer life expectancy coupled with stable or even declining fertility rates: a major increase in the number of seniors relative to the total population. Here's a sample of what that looks like statistically:

In 2016, for the first time in our history, more Canadians were over 65 than under 15²⁵

Today, 17.2 percent of Canadians are 65 and older²⁶; that number is expected to rise to 25 percent by 2036, and to 28 percent by 2061²⁷

The percentage of those at the older end of the age spectrum— over the age of 75 – will more than double in the 35 years from 2011 to 2046, going from 6.9 percent to 14.5 percent of the population^{28, 29}

This demographic direction carries significant economic implications. Canadians will face higher costs for healthcare and income security programs at the same time as we shift towards a relatively smaller workforce, resulting in a smaller tax base to pay for those costs.^{30,31} For economists and policy makers this phenomenon is expressed in the “senior dependency ratio”: the number of working-age people (15-64) compared to the number of people 65 and older.³²

In the 1970's, Canada's senior dependency ratio was 13 seniors per 100 working-age people.³³ Today, there are 25 seniors per 100 working-age people.³⁴ In 2036, there are projected to be 39.5 seniors per 100 working-aged people.³⁵ That's fewer than three working people to support every pension-receiving senior.

The decline comes because the 9.6 million Canadians born between 1946 and 1965,³⁶ the omnipresent generation known as baby boomers, are leaving the workforce. Between 2015 and 2016, an estimated 276,000 Canadians retired³⁷—and that number is only expected to increase. Those retirements come at a time when unemployment rates will already be at record lows³⁸ and amid intensifying labour shortages across the country.³⁹ Assuming no change to retirement age, the last of the boomers will be eligible to collect Old Age Security in 2030.⁴⁰

Serious labour shortages are already upon us. The national jobless rate hit a 44-year low in late 2018, with more than half a million unfilled jobs, up nearly 100,000 from the same point in 2017.⁴¹

Labour shortages are already affecting growth. A 2018 study done by the Business Development Bank of Canada found:



Almost 40% of Canadian entrepreneurs are already having difficulty finding the workers they need.... As a result, some companies are unable to fill customer orders or even have to refuse them. Quality is suffering and competitiveness is declining.⁴²

Those effects slow the economy, reducing tax revenues that governments require for infrastructure building, social programs and services, from pensions to policing. Diminished government revenues mean higher taxes or cuts to services – or both.

Yet social spending is projected to grow, even if existing population trends hold. Spending on continuing care for seniors is expected to jump from \$28.3 billion in 2011 to \$177.3 billion in 2046. Healthcare spending by provincial governments will take a much larger share of government revenue, from 42 percent in 2013 to 55 percent by 2034.⁴³

It may not be enough. Canada is already well behind on social spending relative to other developed countries. We rank 24th of 36 countries in the Organization for Economic Co-operation and Development (OECD), devoting only 17.3 percent of our Gross Domestic Product (GDP) to public social spending. This is considerably lower than the OECD average of 21 percent, and lower than the social spending of our peer countries like the United States, the United Kingdom, Germany and Australia.⁴⁴

Challenges to the quality, equity and access of Canada's social programs will intensify as costs increase and government revenues slow. And tighter spending budgets will reverberate through other government activities, from infrastructure investment to money for everything from arts and culture to defense. Squeezed spending would hit the core support for whatever Canadians collectively value and leave governments less room to manoeuvre when emergencies arise.

GDP per capita, a measure of GDP divided by the number of people living in a country and a common indicator of prosperity in living standards, could also be inhibited by the failure to achieve the productivity gains driven by the economies of scale that are facilitated by higher population growth. Furthermore, GDP per capita levels calculated on the status quo population size are based on two features that will undermine Canada's economic growth potential in the long-term – older workers (who generally earn higher wages) and a lower share of Canadians participating in the labour force⁴⁵.

We don't believe this future will bequeath a better country to the next generations of Canadians. We believe the opposite. We see less economic opportunity. More employers facing talent shortages. Less support for their education or re-training when people need it. Weaker guarantees of help when they get sick or become elderly. Less money for mass and other transportation that is essential to those who live in cities, and for other quality public services for those who don't.

This business-as-usual approach to population growth will not create the economically vibrant, socially generous future Canadians want and expect.

That's why we propose taking bold steps now to shape a different scenario for the next decades, delivering the economic strength that provides us the freedom to choose the kind of country we want to live in.

SCENARIO B

The Economic Case For Strategic Population Growth

There is another path for Canada. Bigger. Bolder. Better. A magnet for anyone with the energy and ambition to make a good life for themselves and their families and join in building vibrant Canadian communities.

Our target – a Canada of **100 million people by 2100** – would allow us to significantly reduce the economic impacts of an aging population. It would mean tripling our size over the next 80 years, something we have done before in less time.⁴⁶ It would make us the 27th largest country by population in the world.⁴⁷

That has a direct impact on Canada's economic prospects. Continuing at the current level of immigration will slow our rate of population growth, with corresponding negative impact on GDP. Alternatively, the proactive approach towards increased immigration, with a target of 100 million Canadians by 2100, could add a full percentage point to annual GDP growth.^{48, 49}

WHAT HISTORY TELLS US

The Canada we live in is a product of mass immigration. There is nothing simple about that legacy.

The waves of European settlement to Canada that began four centuries ago and picked up in earnest in the 19th century, collided with peoples from the first migration to the continent, and whose presence goes back for thousands of years. It provoked a relatively short and brutal rearrangement of power. What is celebrated as a determined act of nation-building by many was a tragedy for those it displaced, a divide that remains neither resolved nor reconciled more than a century later.

So it is with caution that we look to history for guidance on immigration.

The creation of the modern Canadian state emerged from a determination to build a nation through population-driven economic development. From 1909 to 1913, Canada recorded its biggest-ever influx of immigrants relative to population size.¹ More than one million immigrants arrived, mostly from Europe, attracted by the prospect of free land in the west. Others came, too, like the Chinese workers who arrived to build the railroads that stitched a young country together.

Immigration peaked in 1913, a year that saw over 400,000 immigrants arrive, more than five percent of the population at the time² (the current immigration rate is less than one percent³). From the 1890s to the 1910s, the population of Montreal increased by 116 percent⁴; Toronto by 161 percent.^{5,6} Winnipeg's population grew more than five-fold; Vancouver's grew more than seven-fold.⁷ Edmonton grew more than thirty-five-fold.⁸

For our purposes, three lessons relating to population growth and prosperity can be drawn from this history.

First, the settlement of the country by immigration was a colonial exercise that left a legacy of distrust and should never be repeated.

Second, we have a precedent for rapid, planned expansion. Canada has tripled its population before in relatively short timeframes. Its population more than quadrupled in the 36 years leading up to Confederation.^{9,10} And our current population is more than triple the 12 million people we counted in 1945.^{11,12}

A third lesson is that rapid population growth tends to drive economic growth. The late 19th and early 20th century expansion was a deliberate approach to economic diversification and increased trade through population growth, piggy-backed onto the transcontinental railroad's major advance in infrastructure. Two of the strongest periods of GDP growth in Canadian history correspond to or follow closely on the periods of our most rapid population growth: 1911 to 1921, and 1941 to 1971.¹³

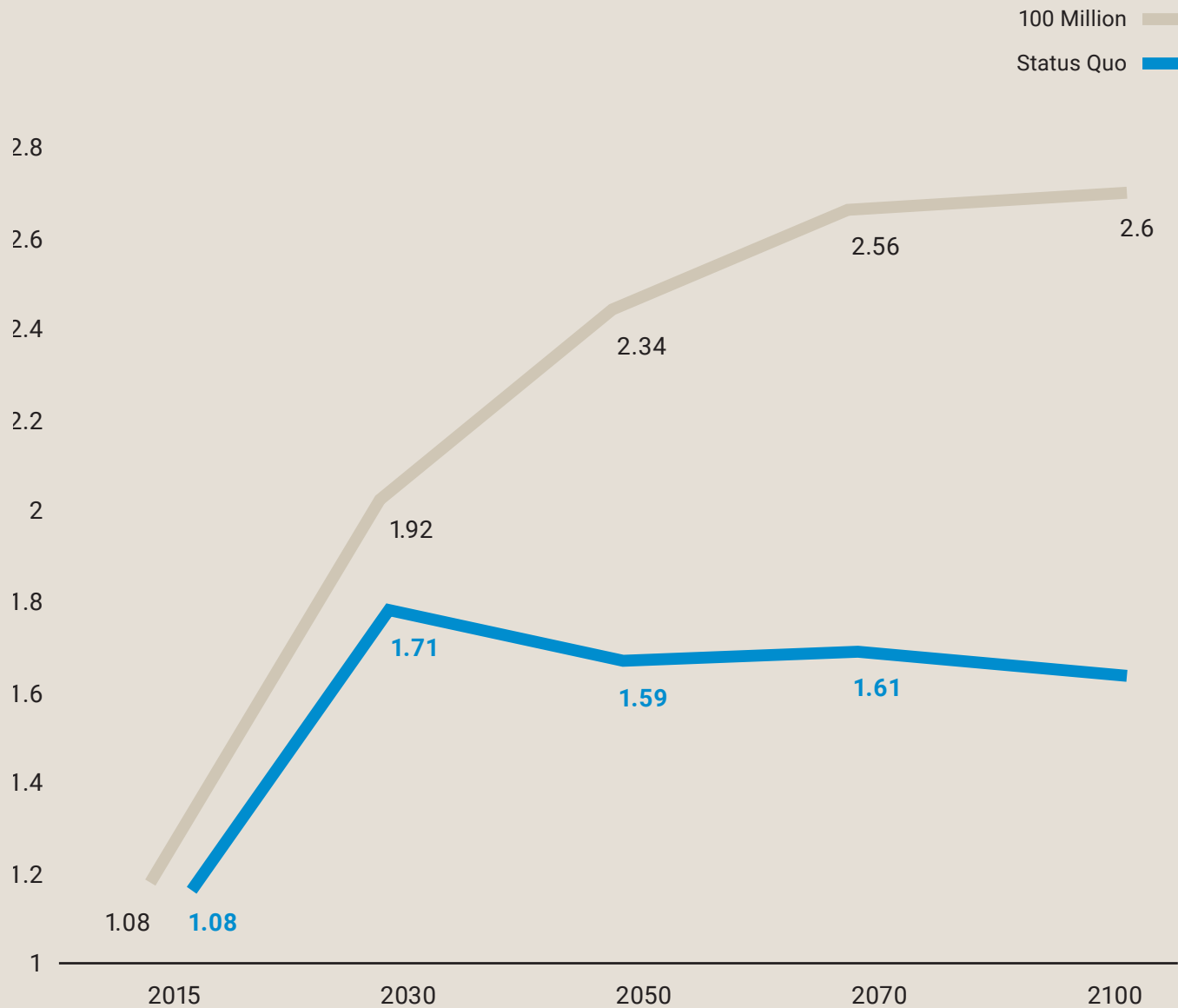
Conversely, periods of slower population growth have contributed to economic slow-downs. This is not a purely Canadian phenomenon. A clear example comes from the United States, where the stock market crash of 1929 was, at least in part, triggered by severe immigration restrictions which came into force in the 1920's.¹⁴

These restrictions were a response to a nativist backlash, with racist undertones, about the size, speed and origins of immigration to the United States in the previous decades. The 1924 Johnson-Reed Act severely curtailed immigration, hitting housing and construction industries hard, contributing to the severe economic contraction to come.^{15, 16}

Today's conditions are vastly different from those Canada faced during earlier eras of rapid population expansion. We live in a time of sluggish economic growth.¹⁷ We have a social contract that commits us to expensive, universal social programs. We are now sensitive to the environmental consequences of our activities in ways we weren't before.

But what those previous eras of immigration tell us is that, when it comes to expanding our country, planning matters. And if we get that right, if we put infrastructure in place and we share the benefits of economic growth, it is possible for people from different places and cultures to live together, building a peaceful, prosperous country.

**Real GDP Growth –
Status Quo Immigration vs. 100 Million**



With careful planning and smart investments, this is a size at which Canada could be expected to have:

Annual GDP growth of 2.6 percent, a full percentage point higher than if we maintain our current course on population growth

A younger national population, which would translate into a sufficiently large labour pool and taxpayer base to ensure we can afford the social programs infrastructure we will need and want⁵⁰

A larger domestic market, big enough to drive both consumption and innovation, provide enterprises a broad and deep pool of employees with relevant skills and expertise, and improved access to capital and international markets

Regions and cities with sufficient density to allow for more concentrated innovation clusters, and with accessible and more environmentally sustainable housing and transportation infrastructure

A vibrant and commercially successful cultural sector, from literature to art, music to sport, creating a larger talent pool and national market for culture and a more powerful platform for Canadians to contribute their diverse perspectives to the world

Enhanced global influence and security, keeping Canada at the top international tables to ensure our voice is heard on transnational issues that affect us

This is not a call to casually throw open Canada's borders. Population growth must be part of a larger strategic plan. Although public opinion polls show that many Canadians express a welcoming attitude to newcomers and a generous view of immigration policies,⁵¹ no country can sustain popular support for large-scale immigration unless strong corresponding measures ensure the expansion is done smartly and smoothly. We need a plan to support a scenario of accelerated and thoughtful population growth, one that foresees the skills, talents and youth needed to offset the challenges of an aging population and to optimize Canada's potential.

That means aligning a population growth plan with upfront investment for infrastructure that can accommodate millions of more citizens. We need to lay out and begin to build transportation networks, healthcare and schools in anticipation of a larger population. And that planning needs to prioritize sustainable development, making sure growth occurs with low environmental impact.

Social policies will need to evolve, ensuring that we have strong national programs to settle and integrate immigrants. We also need to shape and improve programs that benefit all Canadians, new and established, to provide support for childcare and a K-to-graduate school education system that produces people with the abilities required in a knowledge-driven economy and the capacity to translate those skills into jobs and new businesses.

This work needs to begin immediately. As Alex Leblanc, Executive Director of the New Brunswick Multicultural Council puts it:



We are at a crossroads. We have a choice. To manage the challenges of growth or to manage the challenges of decline.

Because whether your ideal number of Canadians at the end of the century is 100 million or something less than that, it is sure to be greater than the 37 million of today.

II. STARTING NOW

A policy that targets success in the year 2100 is ambitious by definition. Like a moonshot, it requires good planning as well as agility to circumvent unexpected challenges as they arise. It will have to capture – and vigilantly maintain – public support for the mission. Without it, the public spending and the social license required for major population growth will dissipate.

That means setting shorter-term goals along the way so that progress can be measured as we grow, we can leverage and replicate our successes and we can address any unexpected consequences from greater population size. A journey that spans generations will require consistent reminders of the linkage between population growth and economic prosperity. But the economic case will have to demonstrate tangible benefits for Canadians from the beginning.

Broadly, we must:

ensure that the benefits of growth are broadly shared

carefully assess and mitigate environmental impacts

work in full collaboration with Canada's provinces, territories, cities, towns and Indigenous communities on strategies for managed population growth

In that spirit we have formulated 10 recommendations – all steps that government and industry leaders can take **today** to put us on the path to strategic population growth. On their own, each recommendation stands to benefit the current generation of Canadians. Together, they form a mosaic of policies and goals that are essential to our long-term goal of a bigger, bolder Canada.

1

RECOMMENDATION 1

Set Targets To Begin Increasing Immigration Immediately

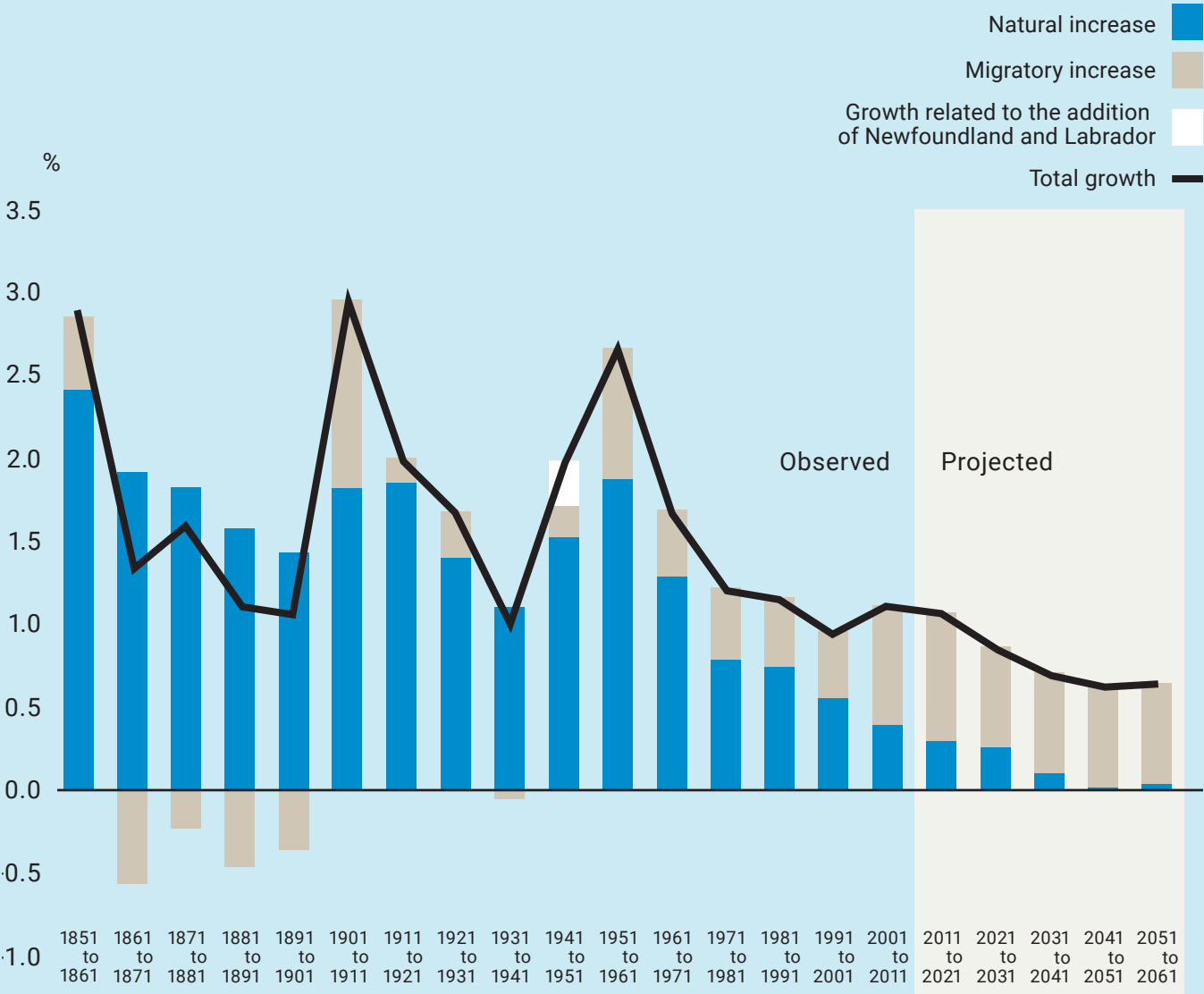
As recently as the early 1990s immigration accounted for just over 44 percent of population growth in Canada. But since 2001, immigration has been the biggest driver, and its importance continues to rise as natural increases wane.

Today, immigration accounts for nearly 80 percent of our population increase, and Statistics Canada projects that number to increase to more than 80 percent by 2031.^{52, 53} By 2033, according to The Conference Board of Canada, immigration will be the sole factor driving population growth in Canada.⁵⁴ In other words, without immigration we will be shrinking, as a country.

We can see the evolution of our dependence on immigration in the chart below.

Annual Average Growth Rate, Natural Increase and Migratory Increase per Intercensal Period

Canada, 1851 to 2061



Note: Data from 1851 to 2011 is observed and data from 2011 to 2061 is projected.
Source: Statistics Canada. 2012. "Population growth in Canada: From 1851 to 2061," *Census in Brief*, Census of Population 2011, Catalogue no. 98-310-x.

The path to reach 100 million Canadians in 2100 requires setting higher immigration targets now, because incremental increases in population size will reap compounding benefits over time, as generations of children are born to Canadians, new and established, each year. Without this near term change, the required levels of immigration would be much higher, and much more difficult to manage.

In the *2018 Annual Report to Parliament on Immigration*, the Canadian Minister of Immigration Ahmed Hussen revealed government plans to admit over one million new permanent residents in the next three years.⁵⁵

But what sounds like a large number is actually a modest increase over past quotas.⁵⁶

We believe Canada should set the following immigration targets:

In 2022, increase immigration numbers to 400,000 – up from the 350,000 already targeted by the government in the year preceding.

Welcome 420,000 new permanent residents in 2023, 450,000 in 2024, and 475,000 in 2025.

from 2026 onward, pin the annual immigration target to 1.25% of Canada's population (today it is just under 1%). This would equate to approximately 500,000 immigrants in 2026 if Canada's population is around 40 million as currently projected.⁵⁷

These increases are neither radical nor unachievable. And immigration levels will need to be continually assessed as time progresses to account for changing fertility, death and emigration rates to ensure that we are on track towards our goal of 100 million by 2100.

Higher immigration targets must be accompanied by further investment to improve immigrant settlement supports and better systems to match immigrants to industries, sectors and places where they are most needed and have the best chance of succeeding.

Strategic immigration is vital to the future of our workforce. Since 2016, the Canadian-born working age population has been in decline.⁵⁸ As one Canadian business leader has pointed out:



Everyone knows the country was built by immigrants, but we don't often acknowledge that the country is still being built by immigrants.⁵⁹

Any solution to our suffering workforce numbers and aging demographics will need a large influx of highly educated professionals, skilled trades-people, general labourers, and those with entrepreneurial experience and spirit. We need younger immigrants, to bolster the foundations of an aging workforce pyramid and encourage international students who come to Canada to contribute to the dynamism of our educational institutions to stay and apply their skills and talents to Canada's future.

The federal government has made improvements with the Provincial Nominee Program⁶⁰ and, more recently, with immigration pilots focused on the Atlantic region and on rural and northern communities.^{61, 62} But businesses, governments and NGOs across the country will need to ramp up information-sharing, collaboration and support to immigrants to ensure the best outcomes in the integration and retention of immigrants.

In comparison to other OECD countries, Canada leads the way in its ability to integrate immigrants into the economy. The employment rate of the foreign born population in Canada is 72% in contrast to the OECD average of 68%. However, when compared to a smaller subset of peer countries, e.g. the United Kingdom and New Zealand, Canada does not perform as well.⁶³ Moreover, the contrast in unemployment rates between the foreign born population and the Canadian born population is stark. Unemployment rates for immigrants between 25 and 54 who have been in Canada for less than five years is 8.6% compared to 4.5% for Canadian born residents in the same age group.⁶⁴ In addition, according to Census data, immigrants have a 13% wage gap in comparison to their Canadian born counterparts.⁶⁵ These facts show that there is significant work ahead in unlocking the talent of newcomers to Canada. Measures to improve language proficiency by improving access to language support programs, to recognize foreign credentials by starting the re-credentialing process prior to arrival and increasing collaboration to align the re-credentialing process with labour market and geographical opportunities can help facilitate integration.

There is little doubt that immigration will continue to be the surest and quickest way to jump-start Canada's population growth to the scale required. For successful population growth, improved economic integration measures are key.

Sounds like a nice idea. But what about...

Can't Canadians just have bigger families instead?

Fertility levels are in decline in advanced industrial societies and Canada is following this trend.¹ Our fertility rate is 1.54, well below the replacement level of 2.1.² There is some evidence to suggest that Canadians would ideally like to have more children than they do, but many cite the cost of having children as a reason they have fewer of them.

We do need to provide more help for those couples who would like to have bigger families, from additional financial support and programs targeted at early childhood to making it easier for women to return to the workforce after childbirth, if they wish.

But the data shows mixed results in countries that have tried to incentivize a higher birth rate. And while financial support and other nudges may boost the fertility rate slightly, it is almost certainly not going to be enough to keep Canada's population at the same level, let alone grow. Only immigration can do that.

2

RECOMMENDATION 2

Increase Early Childhood Support For Canadians Who Want Bigger Families

We urge Canadian governments to pursue more ambitious child care and parental leave policies that would benefit couples who want bigger families, while also making it easier for mothers to rejoin the workforce when they're ready.

There are many reasons why fertility rates are low in Canada. Choice, for one. The cost of living is another. Later marriages another. One of the strongest disincentives to having bigger families in Canada is the absence of affordable childcare and other assistance for young children and their parents. It is also an obstacle for women wishing to return to the workforce after childbirth.

Canada's fertility rate – the average number of children born to women in their childbearing years – is 1.54.⁶⁶ That's well-below the 2.1 rate required to keep population steady assuming no difference between immigration and emigration numbers.

That lower-than-replacement level is in keeping with most of the industrial world, which has seen a steady decline in fertility rates since the 1960s. Indeed the post-Second World War demographic bulge in births was an exception: the path to increasingly smaller families has been a 150-year-long phenomenon, driven by increasing affluence, urbanization, rising levels of education and labour market participation by women, the advent of birth control and the loosening of religious affiliations in many parts of the world.⁶⁷

Several post-industrial countries have devised social policies and nudges to try to change their demographic math—including China, which has abandoned its one-child policy.⁶⁸

Since 1997, Québec has also had incentives to increase fertility, from financial subsidies to low-cost daycare and legislated parental leave.⁶⁹ In *Maximum Canada*, journalist Doug Saunders notes the Québec programs had, by 2010, increased the province's fertility rate from 1.35 to 1.7. Québec's female employment rate also increased by 3.8%, contributing to a 1.7 percent rise in the province's GDP, effectively covering the cost of the fertility programs.⁷⁰ While Québec is attempting to turn the tides on declining natural population growth, this could be difficult. We don't have to look further than Asia to see the inherent challenges in promoting increased fertility.

No country has so prominently struggled with decline and an aging population as Japan, which has historically resisted large-scale immigration⁷¹, has a high suicide rate⁷² and deals with a fertility rate of just 1.43.⁷³ Japan has seen modest success with national policies that offer a scale of financial incentives to families to relieve the financial burden of raising children.⁷⁴ The country has also introduced higher participation targets for men taking paternity leave⁷⁵, subsidies to fertility clinics⁷⁶ and even subsidies for local authorities to conduct speed-dating as a way to encourage match-making.⁷⁷ But Japan's population is on a sharp downward trend that simply having more babies cannot offset.⁷⁸ Its population expected to fall from 126 million today⁷⁹ to just over 83 million in 2100.⁸⁰

South Korea is following Japan's lead. Its fertility rate plummeted to below 1(0.98) in 2018⁸¹, one of the lowest in the world. The South Korean government has spent 135 trillion won (\$149.2 billion Canadian dollars) since 2005 to increase birth rates, providing child care bonuses and subsidies for parents and for fertility treatments as well as launching campaigns to encourage young Koreans to wed and have children, without success.⁸²

Many cite reasons ranging from the growing number of single individuals, the expense of child-rearing, high youth unemployment and a double burden of carrying out the brunt of household chores and childcare for working mothers as the cause of the fall in South Korea's natural population growth.

Yet even if family-friendly policies alone are not enough to get us to the size of population we need, there are merits in helping those Canadians who desire a bigger family. There is evidence to suggest that many Canadians would ideally like to have more children than they do: an Ipsos-Reid poll conducted in 2010 found that, on average, Canadians see 2.4 children as the ideal family size.⁸³ A national childcare strategy, modeled on Québec's incentive program, could bridge this "fertility gap" between the ideal family size and the actual one.

3

RECOMMENDATION 3

Leverage Under-Represented Talent In The Labour Force

We need to find ways to address the systemic barriers that prevent Indigenous Peoples, women, persons with disabilities and seniors from fully participating in our economy to ensure that everyone participates in the prosperity enabled by population growth.

Between 2018 and 2040, 13.4 million Canadians are expected to retire – over 609,000 a year. At the same time, the Conference Board of Canada forecasts that 11.8 million people will leave Canadian schools and join the labour force, far less than the number needed to replenish the work force over the same period of time. By consequence, Canada's labour force is expected to shrink from 19.8 million workers in 2018 to 18 million in 2040.⁸⁴

Canada's labour force participation rate averaged 65.4% in 2018.⁸⁵ While the threat of a shrinking labour force due to accelerated retirements is clear, the question of how to unlock the untapped potential of many

under-represented groups remains unsolved. Enabling greater labour force participation by Indigenous Peoples, women, people with disabilities, and people over the age of 65 will go a long way towards closing the gaps in Canada's labour force, fostering economic growth and increased living standards for all Canadians.

The Indigenous population is the fastest growing population in Canada, due to higher fertility rates, increasing longevity and greater self-identification. In 2016, there were almost 1.7 million Indigenous Peoples in Canada, accounting for 4.9% of the total population, and representing a growth rate of 42.5% since 2006—more than 4 times the growth rate of the non-Indigenous population over the same time period. In the next two decades, the Indigenous population is likely to exceed 2.5 million persons.⁸⁶

Despite this growth, the participation rate of Indigenous Peoples in Canada's labour force flat-lined between 2007 and 2016 – suspended at approximately 13 percentage points below the average rate for non-Indigenous Canadians.⁸⁷ Converging the gap in participation rates between the Indigenous population and the total population in Canada would add 92,000 new workers by 2040 and a contribution of almost \$11 billion to GDP.⁸⁸ However, the barriers to economic inclusion are deeply systemic and pivot upon stronger support for Indigenous-led economic development.

Some measures that have already been identified to increase the participation of Indigenous Peoples include:

Longer term financing for Indigenous businesses from financial institutions;

More public-private sector partnerships for economic development;

Improvement of Indigenous hiring practices, through employment equity and reporting practices; and

Ensuring equity of opportunity in education for Indigenous youth.

Through Québec's subsidized child care program, women in the province aged 25-54 with children under the age of 16 participate in the workforce at a rate of 93% of that of men.⁸⁹ Elsewhere in the country the rate is lower and has stagnated over the last two decades, at 61.5% in 2017, almost 9% lower than that of men.

Closing the gap of female participation throughout Canada to allow women with children to return to work would add 1.6 million people to Canada's labour force and \$65 billion to Canada's GDP by 2040.⁹⁰ Special attention is warranted for the STEM professions, which are facing labour shortages and have a higher impact on economic growth and yet exhibit a high degree of gender inequality. Improved female labour force participation across all sectors could be achieved through such means as:

A national childcare strategy;

More part-time and full-time roles that allow for flexibility in scheduling; and

Initiatives to reduce unconscious bias to create truly inclusive work environments.⁹¹

20% of working age Canadians have one or more disabilities – a long-term or health condition that impacts their everyday activities. The employment rate for persons with disabilities in 2017 was 59% – 21% percent lower than persons without disabilities.⁹² Converging the rate of participation of persons with disabilities with the national average would enable Canada's labour force to grow by an additional 525,000 workers and \$25 billion in real GDP to Canada's economy by 2040.⁹³

In addition to providing incentives and support to employers for workplace accommodations and on the job-training, federal and provincial governments could look to:

The expansion of the role of educational institutions to better facilitate transition to employment; and

Educational and re-training programs customized for persons with disabilities to help them upgrade skills and learn new ones.⁹⁴

Another effective workforce growth strategy – especially in the short term – lies with assisting older workers to stay productive and in the workforce for as long as they wish. While not everyone wants to work later in life, many Canadians are already staying in the workforce longer, either out of choice or financial necessity. The 2016 Census showed a growing number of people age 65 are already remaining in the workforce: more than 53 percent of these men were working in some fashion in 2015, up from 38 percent in the 1995 census. The shift is even more dramatic for women, with 39 percent of 65-year-old women working—twice the proportion of those working in the earlier census.⁹⁵

There is room to make additional efforts to keep those seniors who want to stay productively engaged in the workforce past 65. This need not necessarily be about encouraging longer tenure in existing jobs. It could focus on creating more mentoring, training and ambassador-type roles that leverage the skills and perspectives of experienced workers.

Ideas for further exploration might include:

Employment matching programs specifically for older employees, perhaps run by sector-specific associations and organizations and funded by governments; and

Financial incentives, such as allowing retirees to return to work while still collecting their pensions and other benefits.

Increasing the number of workers between 55-74 years of age (now considered the “young old”⁹⁶) could yield enormous societal benefits:



If the participation rate of this group by 2028 were to be raised from current levels by about 4% in the case of males and 7% in the case of females, this, along with a one-point gain in the prime age female participation rate, would offset two-thirds of the negative impact on population aging in the aggregate labour force participation rate.

Bennett Jones Fall 2018 Economic Outlook⁹⁷

Governments are aware of the potential benefits of eliminating the barriers for workforce participation for under-represented talent. They should act. Maintaining our positive approach to diversity and inclusion is not just the right thing to do; it benefits our economy and, by extension, all of us. Yet greater participation by under-represented talent alone will not solve Canada's labour force challenges over the long term.⁹⁸ Growing our population is paramount.

Sounds like a nice idea. But what about...

With rising automation and applications of artificial intelligence, aren't we facing a surplus of labour in the years ahead?

No one can predict with complete accuracy which jobs will be needed in the future. The McKinsey Global Institute has predicted that, in post-industrial economies such as Canada's, as much as 25 percent of work activity could be displaced by automation.³ But while some jobs or tasks will indeed become obsolete (as they have throughout history), many experts contend we will mostly see a change the type and nature of jobs.

Changing technologies and demographics give a good indication, broadly, of where that work will be: in education, healthcare, senior-care and in the digital technologies and platforms that are re-wiring our economy. It also means that "fundamental" or "soft" skills will be important going forward.

Automation will indeed reduce some of the costs of production and make some jobs redundant. But companies that are more productive are those that can compete and grow, thereby adding jobs in other places, often higher up the value chain, so that overall employment grows.

4

RECOMMENDATION 4

Build The Infrastructure To Accommodate A Bigger Canada

Canada needs a 50-year national infrastructure plan that has long-term funding certainty and can both revitalize existing assets and build new links – physical and digital – to connect Canadians, facilitate business and accommodate a country with 100 million people.

Canadian cities are often ranked among the best in the world on liveability.⁹⁹ But this is not a time for complacency; our cities are undergoing an intensely challenging period of change due to demographic and technological trends, infrastructure deterioration and climate change-related impacts, all while financial resources are increasingly squeezed.

For Canada to successfully grow its population, we will need to find ways to ensure that our communities:

- have modern high-quality infrastructure**
- offer affordable housing and convenient public transportation**
- attract talent and investment and nurture innovation**
- provide a vibrant and inclusive cultural life**
- feel secure and welcoming**
- are environmentally sustainable**

Infrastructure generally refers to the physical assets built and maintained in the public interest that facilitate the functioning of society; everything from roads and bridges to water and wastewater, communications, and public transportation. It also includes social infrastructure, such as cultural, religious, health, educational and recreational facilities. In the near future it will include the digital connectivity at the heart of a data-driven economy, such as the 5G networks that are in gestation.¹⁰⁰ At its best, infrastructure smoothly connects people, jobs and markets, enhancing day-to-day quality of life.

But our infrastructure needs repair and upgrading. Our infrastructure deficit – the money needed for repair and replacement – now stands at more than \$123 billion (accumulated since the 1950s). Left unattended, that figure could balloon to \$2 trillion by 2065.¹⁰¹ In 2015-16, Canada's infrastructure was ranked 14th in the world¹⁰², a fall from 6th place in 2008-09¹⁰³, primarily based on assessments of transportation and connectivity in this country. And as Canada's population grows, our infrastructure needs will grow larger.

On the bright side, as much as \$750 billion in infrastructure investment is planned by 2026 at the federal, provincial and municipal levels, not including private investment that may be added to the mix.¹⁰⁴ However, this spending has not necessarily been budgeted, and there remains a great deal of uncertainty as to when funds may flow, to whom, and where the priorities will be. Bickering over who pays for what takes up an inordinate amount of time and energy, insufficient funding is unlocked, and decisions and investments with long-term

impact are too often made with short-term political considerations in mind.

The position of Canadian municipalities is tenuous. They are responsible for 60 percent of Canada's public infrastructure, along with an expanding suite of services, but see only 10 percent of tax revenues.¹⁰⁵ Better alignment of funding responsibility and fiscal capacity is urgently needed.

To rectify both current issues and to support further population growth, we must re-engineer the planning process and revisit the roles and responsibilities of the various levels of government to enable better collaboration and faster decision-making:



We need to begin by putting infrastructure at the heart of Canada's economic development... Canada needs a pan-Canadian infrastructure strategy to determine how funds can be best allocated for tomorrow and for the next 30 years.

Public Policy Forum, Building the Future: Strategic Infrastructure for Long-Term Growth, 2016¹⁰⁶

Such a plan would require bold federal leadership and strong championing, and the prioritization of nationally-significant projects.¹⁰⁷ It should focus on both maintaining existing infrastructure and building the new infrastructure we need to better link existing growth centres and to anticipate new developments such as the opening of the North-West Passage.¹⁰⁸ The hope is that Canada's Infrastructure Bank will help the country make strides on issues of both process and substance.

As the Public Policy Forum notes, our peer countries from Australia to Great Britain and the Netherlands have developed comprehensive multi-decade national infrastructure plans. To scale Canada's potential for population growth, we need one too.

5

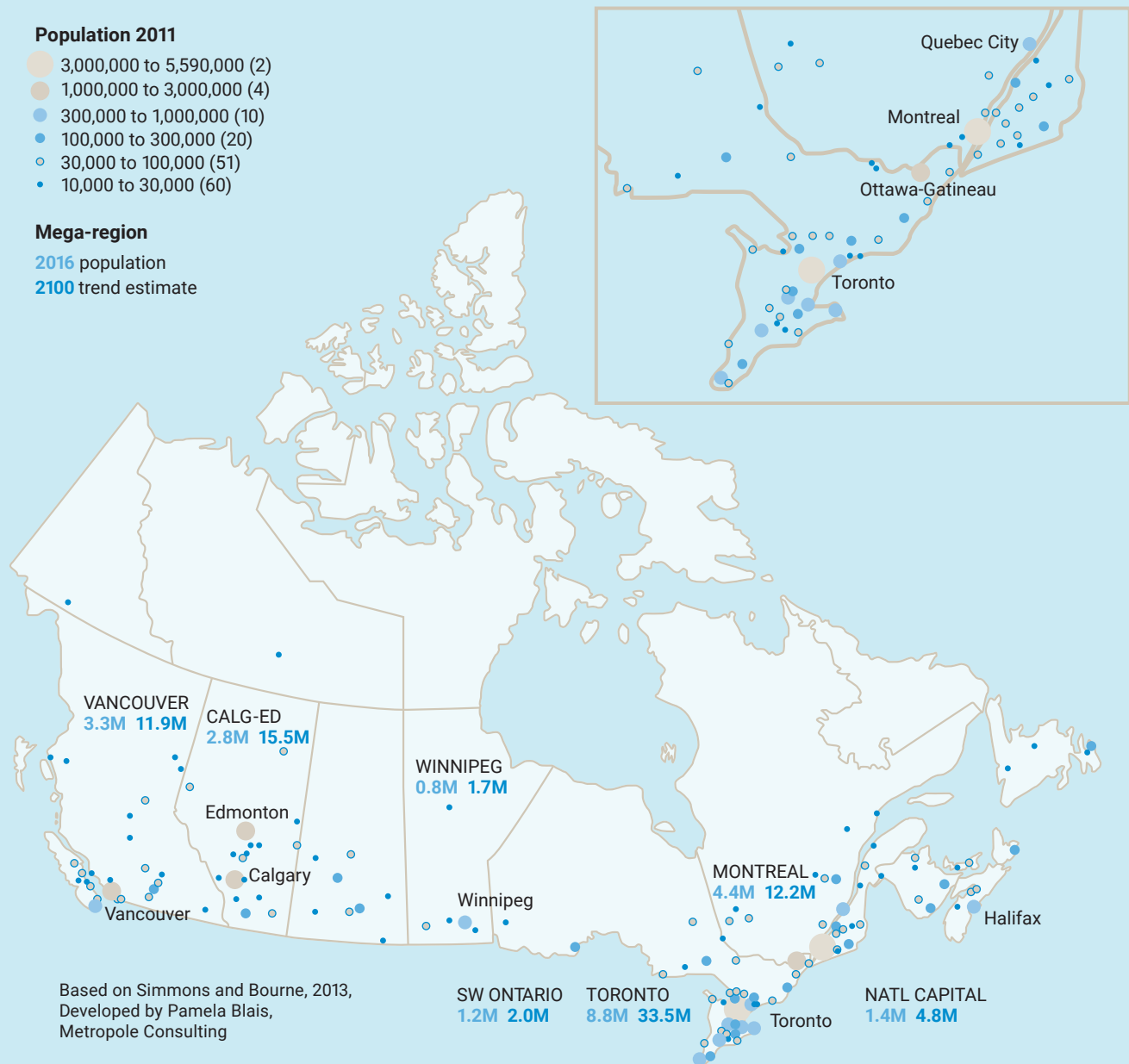
RECOMMENDATION 5

Develop Greater Density In Mega-regions

We urge land use, infrastructure and economic development policies that drive greater population density in our cities and regions. Our mega-regions can be globally competitive hubs of economic power, innovation and culture. Properly planned, greater density is energy efficient, reduces environmental impact and delivers a high quality of life for residents.¹⁰⁹

Imagine Canada, by the turn of the next century, as a nation of mega-regions. Mega-regions have been defined as interlocking areas with more than one city centre, typically with populations of 5 million people or more, and producing at least \$100 billion in goods and services per year. They can be formed by big urban centres amalgamating with smaller nearby cities and towns, but however they come together, they work best when treated as geographical units, with common transportation systems, coordinated economic development strategies and land use decisions.^{110, 111}

What might a bigger and bolder Canada look like in 2100 if mega-region growth were central to our plans?
Here is one such view, including mega-regions that are home to 81.6 million people, formed around existing cities:¹¹²



A mega-region approach with increased density would have multiple benefits:



Population density is important because it creates nodes of economic activity and opportunity that foster economic innovation, productivity and growth, as well as cultural and artistic opportunities. Dense urban centres allow for economies of scale in spreading the costs of infrastructure, such as transit, across more people, creating efficiencies.

The Fraser Institute, *Canada must grow denser and more populated*¹¹³

The Fraser Institute compared major cities in Canada with those in other high-income countries and found that Canada's biggest cities have much lower density than centres like Paris, London, New York and San Francisco. Current constraints on growth in our cities, from strict zoning regulations¹¹⁴ to inadequate infrastructure investment, have made life harder, from more expensive housing to longer commutes.

Perhaps counter-intuitively, increasing population density would have environmental benefits, at least on a per capita basis. In *Maximum Canada*, journalist Doug Saunders notes that our spread-out population "forces us to use inefficient and highly polluting forms of transportation, heating and energy, because our population density is too low to support more energy-efficient technology." A move to increase density with a mega-region approach would lead to more efficient public transportation options and fewer single-family homes, thereby reducing per capita energy consumption. As Saunders points, the paradox is that we "need a lot more population to overcome the practical and ecological problems of population."¹¹⁵

Increasing the density of our mega-regions and cities will require better ways of linking development and transit networks so workers can more easily connect to their employers. Younger Canadians would be better-able to afford housing within a commuting distance of work, creating the connections that lead to more innovation – and more opportunities to find partners. We need to be cognizant of the risks of creating ghettos of new immigrants and those on low incomes, ensuring that development takes account of the need for mixed use.

We need to factor in the emergence of mega-regions that are multiple times the size of those we have today into our land use, infrastructure and economic development policies in order to plan for a Canada that is built on scale.

Sounds like a nice idea. But what about...

Rising population are already taking a heavy toll on our environment. Won't a "bigger Canada" mean greater environmental degradation and increased greenhouse gas emissions?

Underpopulation harms Canada's climate and ecological future in key ways. First, it forces us to use inefficient and highly polluting forms of transportation because our population density is too low to support more energy-efficient technologies. Greater population density would allow us to build up public transportation capacity that would be less energy intensive as well as to reduce emissions per capita through more energy-efficient buildings.⁴

Second, our relatively small population limits the fiscal and human resources we need to move into a greener energy future. Building a low-carbon economy requires scale, innovation and capital. And coping with the effects of climate change will be expensive. Among the costs:

- Coastal defenses against rising sea levels
- Replacing urban infrastructure so that it will be more resistant to volatile weather patterns
- Participating in a global drive to build carbon removal technology
- Taking measures to make our extractive industries more carbon-neutral and
- Shifting to non-polluting energy sources.

We will need a strong fiscal base to meet the costs and challenges of the coming energy shift.

ADDRESSING REGIONAL DIFFERENCES

Any discussion of “place” in the Canadian context requires assessing the very different advantages and challenges in the country’s various regions, provinces, cities and towns. Regarding population, however, the trendlines are consistent.

The **Atlantic provinces** are leading the country in terms of aging populations, due to lower fertility rates and provincial net migration rates.^{1,2} By 2038, they are projected to be well ahead of all others in median age and in percentage of the population over 65:³

Province	Projected Population in 2038 ('000)*	Median Age	% Population Over 65 Years of Age
Newfoundland & Labrador	455.6	53.3	34.5
Prince Edward Island	178.3	47.7	27.9
Nova Scotia	933.9	49.6	30.9
New Brunswick	752.5	49.8	31.3
Québec	9,405.3	45.2	25.1
Ontario	16,548.8	44.3	24.7
Manitoba	1,623.1	40.6	20.6
Saskatchewan	1,315.2	41.1	21.4
Alberta	6,224.8	39.7	18.5
British Columbia	5,918.8	44.9	25.1

Baseline projection – status quo immigration; Source: R. Saillant (2016)

As New Brunswick economist Richard Saillant, notes:



Atlantic Canada is in the eye of Canada's demographic storm. While all of Canada is seeing slower labour force growth as baby boomers are retiring, Atlantic Canada is actually witnessing an absolute decline in its number of workers. From a national perspective, boosting immigration is a top priority. Seen from Atlantic Canadian eyes, however, it is an imperative.

Richard Saillant, author of A Tale of Two Countries – How the Great Demographic Imbalance is Pulling Canada Apart

Considerable attention is now being paid to this issue in Atlantic Canada. The federal and all four Atlantic provincial governments are engaged in a pilot project to fill labour gaps by better connecting employers and immigrants, and better supporting immigrant settlement. Several of the Atlantic provinces are also putting great effort and financial resources into promotional campaigns targeting economic immigrants.

RURAL AND SMALL TOWNS – Canada should also have policies to ensure that smaller cities and towns have the jobs, tax base and services to provide residents with a good quality of life. Smaller communities can be disproportionately affected by the economic fallout from an aging population. Digital connectivity should be one way to allow Canadians to work from smaller centres if they choose. And these cities and towns can also benefit from the injection of economic adrenaline that comes with increased immigration.

Fortunately, more immigrants (39 percent in 2017⁴) are already settling in smaller cities and communities outside of the usual city suspects: Montreal, Toronto and Vancouver. This has been helped by the Provincial Nominee Program, which gives provinces considerable say over the selection of immigrants, and by communities that are proactively seeking to build their populations.

Focusing on smaller communities, the New Brunswick Multicultural Council delivered an innovative program in 2018 called New Conversations. Fifteen small communities in the province were provided with highly-customized information about local economic and demographic trends and outlooks.

Town-hall discussions were held, hosted by community leaders and designed to spark the development of action plans such as immigrant attraction and welcoming initiatives. This program was considered highly successful by organizers and participants and has the potential to be scaled across Canada to other smaller and/or remote communities.⁵

QUÉBEC – While this report examines the national need for a bigger population and increased immigration, it is vital to any continuing discussion that Québec’s distinct position and character are carefully considered. Maintaining the province’s size relative to the rest of Canada has long been a concern – one enshrined in the Canada-Québec Accord on Immigration of 1991. It provides that:



An objective of this Accord is among other things, the preservation of Québec’s demographic importance within Canada and the integration of immigrants to that province in a manner that respects the distinct identity of Québec.

Under the Accord, Québec has the right to set its own immigration targets and choose its own economic immigrants.⁶

Yet, the demographic and economic realities for both Québec and the rest of Canada have changed considerably since the Accord was concluded. Labour shortages are becoming more evident in Québec, which now has one of the highest job vacancy rates⁷ and the second lowest unemployment rate in Canada.⁸ Québec needs more immigrants than it used to, however, the number of immigrants accepted by Québec has not kept pace with the numbers in other parts of Canada as a proportion of provincial populations. In 2017, Québec took in just over 18% of Canada’s immigrants⁹ whereas it had 23% of the population.¹⁰ Ontario took in 39% of Canada’s immigrants with 39% of the national population.

Québec will need to take in far more immigrants if it wishes to maintain its historic share of the population – not the direction it is currently going in. The new provincial government is aiming to reduce the province’s immigration targets, starting in 2019,¹¹ a move that appears to have the support of almost two thirds

of Québécois.¹² Great care needs to be taken to ensure that any move by Canada to be bigger recognizes existing obligations on demographic and political balance with the rest of Canada. However, as the rest of the country grows, Quebec runs the risk of shrinking its relative size within Confederation.

Future success will rely on our ability to effectively manage the growth of urban centres and regions but also smaller and more rural communities and of the North. A proactive effort to engage and meet the needs of all regions of Canada will – as always – be essential.

6

RECOMMENDATION 6

Look To Expand In The Near And Far North

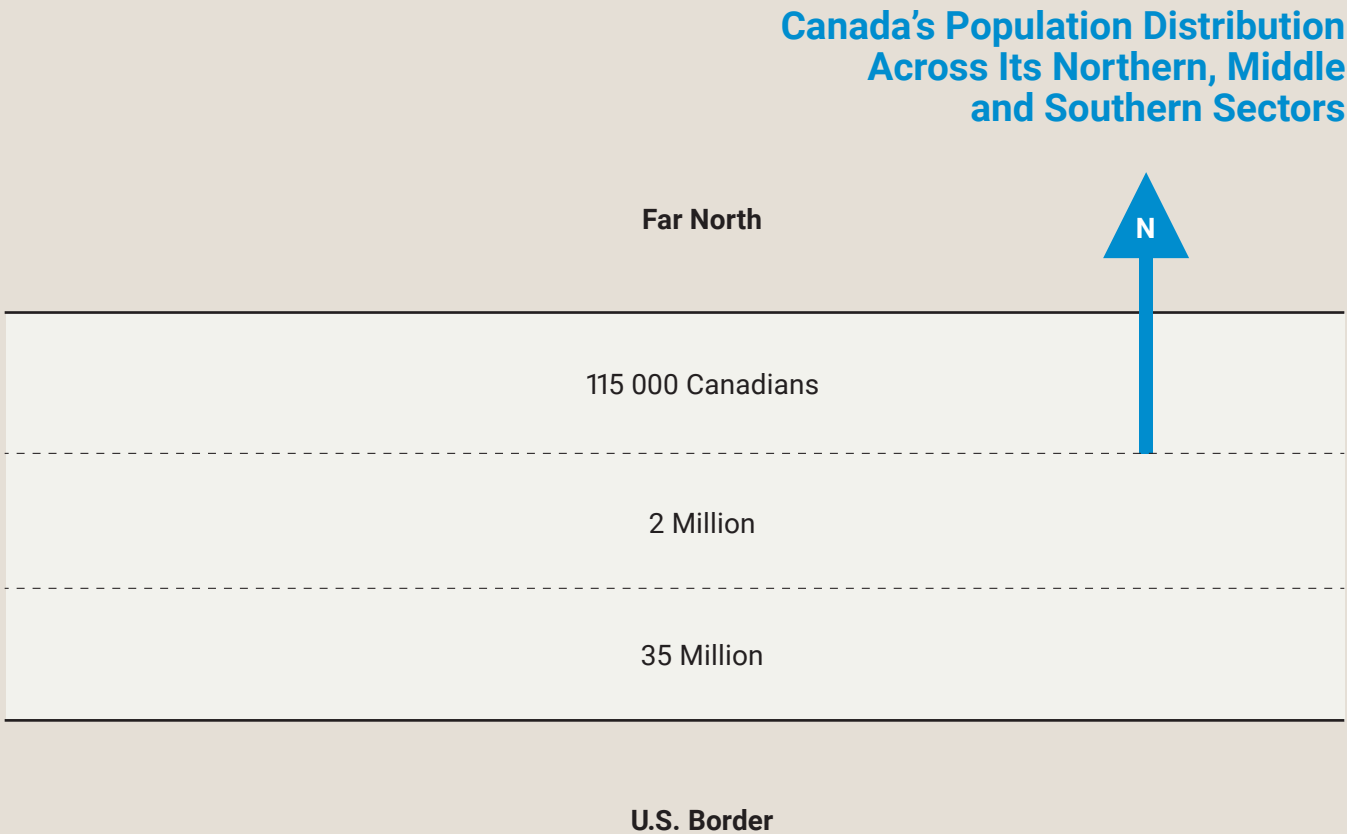
We need a national conversation within Canada – characterized by respectful and meaningful dialogue with Indigenous peoples about increasing population in the North.

Speculating on the future of Canada's North has long-been a source of passion and focus for thinkers, dreamers, developers, environmentalists and others it lures with its promise. But it has never penetrated the daily consciousness of a country in which overwhelmingly, the population is locked in a thin band along our southern border.¹¹⁶

That should change. To realize the potential of the North, we must come together with Northern nations to spur growth and development. The number of people in Canada's North is growing, meaning development and environmental issues will require significant attention from policy makers in the coming years. Between 2011 and 2016, population in the North increased by 5.9 percent, a greater rate than the 5 percent national

population increase during that time-period.¹¹⁷ In fact, Nunavut showed the strongest population growth in the country, with a 12.7 percent increase (from almost 32,000 to almost 36,000) in that timeframe.¹¹⁸ This growth is largely due to Nunavut having a fertility rate of 2.9, the highest in the country during that period.¹¹⁹

Yet population numbers in the North remain small, both in real terms and relative to the rest of Canada:



Compare those Canadian figures to the two million people living in Arctic Russia.¹²⁰ That has strategic implications for the future of the North and its oceans. Canada must have a strong, vital presence on the world stage to advance our interests with respect to this strategic, environmentally sensitive land.^{121, 122}

Indeed, the strategic position and economic potential of Canada's North give it an outsized importance according to Irvin Studin, Editor-in-Chief & Publisher of Global Brief magazine:



Across all three of our Northern territories, we have a total population of about 115,000. Below the territories, across all 10 provinces, I calculate the supporting “quasi-Northern” population of the country, from Fort Nelson to Churchill and Kapuskasing, to be less than two million... We will not be able to protect, control and manage the North, including in environmental terms, with such paltry demographic resources. Even if we do not see Russia or other Arctic countries as necessarily a future threat, we do not have anywhere close to enough people in – and thinking professionally about – the North to sustain serious bilateral or multilateral processes about how to manage the North in our interests and on our terms.¹²³

The Arctic Ocean's receding ice cover and the region's warming average temperatures are already spurring international interest for expanded shipping and mineral exploration in a sensitive ecosystem with global climate implications.^{124, 125, 126} The Arctic does not need an unregulated development free-for-all. But there is the lure of opportunity. Guggenheim Partners estimates that the Arctic will require close to \$1 trillion in investment for transportation, telecommunications, housing and social services.¹²⁷

The opportunity for further development in the North raises questions about how big a population it could sustainably support. For advocates of development, the future North would be a hub of economic activity. As Benjamin Ryan, Chief Commercial Officer of Air North in Whitehorse notes:



The North is an incredible place to live and work. As more and more Canadians experience life in the North, and as we continue to see population growth, the cost of living will drop and further favour vibrant communities that contribute to Canada's competitiveness on the global stage. A North that relies on the South can be seen as a drain on Canada, but a self-sufficient North will be a hub for innovation and a magnet for talent and visitors from the entire country and world.

Growth in the North remains constrained by low population densities, not enough jobs, infrastructure deficits, food insecurity and an under-supply of affordable housing and healthcare. It is also one of the battlegrounds over climate change, given its role in the global climate system. Northern governments will have to determine the desirability of greater population. But clearly without a Canadian presence in the North, there will be a diminished Canadian stewardship of its economic and ecological future.

Another planning option is the “Mid-Canada Corridor,” an idea originally proposed by Richard Rohmer over 50 years ago, and more recently championed by John van Nostrand. It calls for creating larger and more permanent communities in the resource-rich areas between our southern cities and the Far North. According to van Nostrand, this would boost economic growth and job creation through investment in the associated infrastructure. The idea is to move the near North away from the damaging boom and bust cycles of resource development to diversified economies.¹²⁸

Areas for focused development might include those identified below:



These areas are among the most economically productive areas in Canada, and have further growth potential, habitable climates and a great deal of space to accommodate more people. A strategy to attract and retain newcomers to these areas could be developed, based on growing economic opportunities and targeting people with relevant skillsets. And, this type of far-spread population growth could reduce pressures on cities in the South.

Of course, any development that increases population has major implications for Indigenous peoples and would require a collaborative approach. Indigenous peoples are vital to the economic, social and cultural progress of Canada. Their communities must share in the economic benefits of a bigger Canada. And they must have the freedom to develop in ways that are compatible with their own traditions and wishes. That will remain a challenge until a new relationship is forged. We simply need to imagine new possibilities of what might be.

7

RECOMMENDATION 7

Invest In A Globally Ranked Education System That Can Be A Magnet For Top Talent

Canada should develop its post-secondary institutions to become centres of excellence that would enhance our ability to attract and retain the best students, researchers, and professors from around the world, and ensure the highest quality of education for those born here, the key to a competitive workforce in the knowledge economy.

Education is a key measure of our national prosperity. Strong schools are springboards to economic growth in at least two respects: at their best, they instill the knowledge and develop the skills that students need to think, work, and imagine. And they can act as a magnet to the best and the brightest around the world. Many students who come to Canada to learn, end up staying. Canada is better for it.

Canadians are already among the most educated populations in the world,¹²⁹ and we must ensure that they continue to be supported by top-tier educational systems and institutions that are widely accessible.

We will need to invest in education in the same way we do in infrastructure and city-building. Our current and expected future labour shortages make it even more critical to get the education piece right. We should not assume that we will always be a top destination for talent. An expanding list of countries are aggressively recruiting international students and offer opportunities for a high standard of living post-graduation.

That means preparing students for the jobs of tomorrow as well as today. And it includes helping students to learn to think critically, to develop the “softer skills” that will ensure they can adapt to the changing demand for skills in a digital economy.



Educational institutions need to equip youth with broader skillsets, helping them develop the human skills that complement technology – skills like communication, collaboration, complex problem solving, creativity, empathy and rapid learning. And because these skills are more enduring and transferable, they will increase job mobility.

Zabeen Hirji and Stephen Harrington, “Prepare now for the workforce of the future”¹³⁰

World-class and world-renowned universities and colleges are a vital component of future prosperity. Universities are where much of Canada’s pure research is conducted and many of those institutions now aggressively seek ways to commercialize their discoveries, forming companies and creating jobs. Colleges and vocational schools provide accessible applied training to meet labour force demands, and fast-track the pace of skills evolution to match an evolving economy.

The quality of Canada’s educational system, institutions and programs will dictate whether we can attract the best and brightest candidates from elsewhere to grow our workforce. The number of international students in Canada has been growing over the past few years: in 2015, we had just over 219,000 study permit holders, and in 2017 the number had jumped to over 317,000.¹³¹ And applications to several Canadian universities from international students jumped by 20 percent or more in 2017.¹³²

This is all good news, both because international students contribute a great deal to Canada’s economy – an estimated \$15 billion per year¹³³ – and because they are young, educated and have relevant language skills, the ideal profile needed in the Canadian workforce. Furthermore, they bring skills and experiences that are complementary to those of Canadian workers, encouraging new ideas to emerge and broader perspectives to take shape. What they need is a clear and easy path to citizenship, to enhance the scale of Canada’s ambitions.

8

RECOMMENDATION 8

Attract And Develop Talent With The Skills For The Digital Age

Investing in the knowledge, skills and training needed for the digital economy must be the priority for Canadian educators and business leaders. And the corporate sector must play a big role in pushing for immigration and visa rules that attract talent from elsewhere, and for social policies that help them succeed when they get here.

The nature of what constitutes work has forever been in constant evolution, broken by occasional revolutions that mark the shift from one age to the next. There are no clear dividing lines between eras but it is apparent that the current rise of digital technologies is taking the world into a new industrial age. Artificial intelligence, robotics, big data analytics the Internet of Things and more do not signal incremental change in the ways we work. These new technologies and platforms mean that the future economy (however opaque it appears now) will be more connected and more data-driven. It will re-define such fundamental matters as what an asset

is and how to measure value. And while many current jobs and tasks will carry forward into this new economy, Canada is going to need massive numbers of workers with skills that make them fluent in the new ways of work.

There is and will continue to be informed speculation on the extent of automation-driven job loss in the existing workforce. McKinsey Global Institute has predicted that as much as a quarter of work activity in developed countries such as Canada could be displaced by automation.¹³⁴ This does not, however, mean that 25 percent of people will be without jobs. Many observers argue that automation will relieve workers of some tasks, while they shift into other work. But the demographic challenge indicated in this report is evidence that Canada will have healthy demand for jobs in education, healthcare and senior-care, as well as in growing areas from software development to data analytics.

The success of Canadian companies will be tied to their ability to find and retain workers with a 21st century skill set: the right combination of knowledge, training and soft skills, and the capacity to be continuous learners throughout their lives. There is also growing recognition of the need for all workers, in all fields, to be educated on the skills increasingly critical to all jobs, including:

Analytical thinking and complex problem-solving

Communication and collaboration

Empathy and all forms of emotional intelligence

Curiosity and creativity

Risk-taking and entrepreneurship

Adaptability

A 2018 report by RBC entitled, “Humans Wanted”, summarized the foundational skills that companies will be looking for in younger workers:



The strongest demand is for the foundational skills that separate good from great in every walk of life, and especially in Canada’s increasingly services-oriented economy. Communication, emotional intelligence, critical thinking and analysis: young Canadians will need these skills in an age of rapid change. They will need to work well with an increasingly diverse range of other people – business partners from around the world, plus co-workers of all ages, genders, languages and cultures – and to complement technology, which will become ever more pervasive.¹³⁵

These skills increase in value as workplaces become more diverse. Companies will need to ensure that their workers can adapt and be inclusive, customizing approaches to different groups as needed. New emphasis may be needed to ensure that all skills (hard and soft) required for jobs are clearly communicated, that new funds are found for employee training needs, and that broader work experience opportunities within companies are available to enhance learning opportunities.

An emphasis on lifelong learning and employability will grow in the coming decades. The assumption that education is to be completed early in life is outdated, and will not serve the interests of a bigger, bolder Canada. According to the McKinsey Global Institute:



It’s not enough to think or talk about ‘retraining’ and ‘reskilling’. These terms sound episodic... Instead, employers, employees, educational institutions and public sector leaders need to start talking about ‘lifelong employability’: helping people continually and successfully adapt as the economy evolves.¹³⁶

Going forward, it will be expected that skills will be continually acquired over careers. It’s important that the emphasis on lifelong learning applies to all workers, not only those on the highly educated and highly motivated end of the spectrum. This will mean ensuring that workers can “earn while they learn”, or at least that the learning is incented and broadly available.¹³⁷

Investing in the knowledge, skills and training needed for the digital economy must be a shared priority for Canadian educators and business leaders. The corporate sector must play a big role in encouraging immigration policies and improved visa rules that attract talent from elsewhere, and for social policies to help new arrivals apply their skills. Governments and the private sector need to be aligned and to partner to ensure Canada has the talent in place to capitalize on the potential of the digital age. Above all, to scale the potential of a growing population, educators and employers must incent and enable everyone to embrace a new reality of work-integrated, lifelong learning.

Sounds like a nice idea. But what about...

Won't millions more immigrants take jobs away from Canadians already here?

A period of serious labour shortages is already upon us. The national jobless rate hit a 44-year low in 2018, while more than half a million jobs were unfilled, up nearly 100,000 from the same point in 2017.⁵ Over the course of the 2020s, it is projected that 276,000 Canadians will retire every year.⁶

Every vacant job is a person not paying taxes which go to, amongst other things, our social safety net.

We need more workers. Now. And we need to do a better job of aligning their skills to labour market requirements.

Meanwhile, immigrants are job-creators and business-builders. Data from Statistics Canada shows that established immigrants have been more likely than Canadians born here to start and own businesses.⁷ And a report from the Advisory Council on Economic Growth notes that “qualified immigrants can bring critical skills that will help small Canadian companies scale into large, established enterprises that create high-quality jobs for all Canadians”.⁸

9

RECOMMENDATION 9

Scale Innovation And Entrepreneurship

Removing barriers to the scaling-up of talent, capital, connectivity and markets for Canadian companies will foster a sustainable, growing economy – and create high quality jobs and prosperity for all Canadians.

Canada must build a cutting-edge, new-century economy that leads invention and innovation, dynamism, adaptiveness, resilience, and the development of key investment networks and relationships. If we get this right, Canada will be an engine of innovation, entrepreneurship and talent – key drivers of 21st century competitiveness. Scaling up Canada's population is a necessary condition of this success.

In 2018, Canada ranked third in the Global Entrepreneurship Index.¹³⁸ However, despite our entrepreneurial spirit, few companies scale up – only 2% of mid-sized businesses in Canada succeed in growing into large businesses.¹³⁹ The role of large businesses in sustaining our collective prosperity is clear – they accelerate job creation and catalyze innovation, entrepreneurship and economic growth.

To achieve scale in innovation and entrepreneurship, we need:

A vibrant, constantly replenishing pool of talent amid intense global competition

Ready access to capital and investors for good ideas

National, provincial and municipal laws and regulations that constantly evolve to favour Canadian economic success

The development of world-class Canadian superclusters, such as the Toronto-Waterloo Innovation Corridor:



Turning the Toronto-Waterloo Innovation Corridor into a global innovation hub has the potential to deliver a \$50 billion increase in direct equity value, \$17.5 billion in direct annual GDP, and more than 170,000 high quality jobs by 2025.

"Tech North: Building Canada's First Technology Supercluster", McKinsey & Company¹⁴⁰

Highly innovative Canadian companies, large and small alike

A sufficiently large national consumer market

However, the latest 2018 *Forbes* list of the 100 world's most innovative companies does not include any Canadian companies among the top 50. Only one Canadian company cracks the top 100. This is a problem.

Ranking	Company	Country
1	ServiceNow	United States
2	Workday	United States
3	Salesforce.com	United States
4	Tesla	United States
5	Amazon.com	United States
6	Netflix	United States
7	Incyte	United States
8	Hindustan Unilever	India
9	Naver	South Korea
10	Facebook	United States
11	Monster Beverage	United States
12	Unilever Indonesia	Indonesia

With a few exceptions, all of the leading innovative companies in the *Forbes* list come from large countries – most importantly, from countries with large consumer markets, with a growing Asian footprint (the US, China, India, South Korea, Japan, Indonesia, Thailand, France, Italy and the United Kingdom). Only one firm hailing from a country with a smaller population than Canada’s cracks the top 40, while only 10 smaller-country firms make the top 100 list altogether.¹⁴¹

In this regard, there is strong research to suggest not only that innovation is affected by greater competition, but also that innovation grows when the size of a company grows (largely due to the amortization of innovation, R&D, and new technology costs). And, of course, larger companies typically require larger markets.

Of the 10 smaller-country firms included in the *Forbes* list, 9 come from member states of the European Union (countries like Belgium, Netherlands and Ireland), meaning that these firms enjoy relatively free access to a consumer market of over 500 million people.



The federal government has committed over \$1 billion to support venture capital investments across the country. But unless we have the necessary size and diversity of companies, people and ideas, there will not be a sufficient number of investments to produce a return on these funds and to help create the future companies and industries that will be needed to generate increasing levels of productivity, standards of living and well-paying jobs. Size does matter!

Fred Lazar, Associate Professor at the Schulich School of Business, York University.

10

RECOMMENDATION 10

Educate Canadians About The Economic Case For Immigration

We need the tools and organizations to base the coming discussion about expanded immigration in facts. We need to engage critics by making the economic case for a bigger Canada.

By the mid- 2030s, immigration will account for 100% of population growth.¹⁴² Despite the vital need for increased immigration to ensure Canada's long-term prosperity, Canadian public opinion around immigration is conflicted.

On one hand, Canadians tell pollsters they are very accepting of immigration, believing it to be more of a positive than negative influence on the country and that our current acceptance levels are not too high. The Gallup Migrant Acceptance Index ranks Canada 4th among 140 countries for openness to immigration.¹⁴³ And although numbers vary across the country, other polling reveals that immigration is not a top-of-mind issue for the vast majority of Canadians.

Recent polling confirms this generally positive view of immigration among Canadians:

a significant number believes that the economic impact of immigration is positive (76 percent in a fall 2018 Environics Institute poll¹⁴⁴)

a majority believes that immigration levels are not too high (58% in the Environics Institute poll)

Yet the surveys also show that Canadians do have concerns about the impact of immigration on our “culture and values” and “jobs.” The Environics Institute’s Focus Canada survey in the fall of 2018 found that 52 percent of Canadians agreed with the statement that “there are too many immigrants coming into this country who are not adopting Canadian values.” And a recent Ipsos poll revealed that 40 percent of those polled are concerned about immigrants making it more difficult for Canadian citizens to get jobs.¹⁴⁵

These are worryingly high numbers given that studies repeatedly show the idea of the “job-stealing immigrant” to be a myth,¹⁴⁶ and that cutting immigration would have a negative impact on the economy.¹⁴⁷ The numbers show that immigrants:

are highly educated: over 39 percent of immigrants have a bachelor’s degree or higher (compared to 24 percent of the Canadian-born population),¹⁴⁸ while 36 percent of immigrants’ children between 25 and 35 years old have a university degree (compared to 24 percent their peers with Canadian-born parents)¹⁴⁹

are, in the case of recent immigrants, approximately seven years younger on average than the general population¹⁵⁰

have relevant language proficiency, with 93 percent of immigrants having knowledge of English or French;¹⁵¹

are in good health, indeed healthier on average than Canadian-born residents, and remain so twenty or more years after they arrive;¹⁵²

commit less crime, which has the effect of lowering our overall crime rate. Every 10 percent increase in the share of immigrants in a population lowers its property crime rate by 2-3 percent;¹⁵³ and

are highly entrepreneurial. Immigrants start more businesses than their Canadian-born counterparts: 10.8 percent of immigrants who have been in Canada for 10-30 years are self-employed, as compared with 7.5 percent of those born in Canada.¹⁵⁴

The statistics show that vastly more effort needs to be made to inform the public about the meaningful social and economic contributions of newcomers. We need our community leaders and citizens-alike to become better-informed about the data on immigration, and to be willing to share those facts when they encounter disinformation wherever they are, at work, among family and friends, or online.

Community engagement will be enhanced by better data and information. Canada needs good quality data on the economic and social impact of immigration so we can have an informed debate. We are calling for the following elements included in any public education strategy.

1. CREATE AN ECONOMIC RESEARCH CONSORTIUM that will:

- develop a detailed cost-benefit analysis of approaches to increasing Canada's population over the course of the century, with economic modelling of alternative population levels and timing
- advance research into the implications for various regions and populations in Canada
- provide a data-informed view on the social and environmental implications for Canada of a population growth plan

2. CONVENE A CANADA 2100 SERIES OF VISIONING SESSIONS across the country to kick-start public conversation, with broad-based participation. Full-day events would encourage discussion on the long-term future of Canada and the obstacles to getting there, and generate ideas for forging the right course. A report capturing the nature of the discussions and the best ideas generated would be published and promoted and could potentially be a launch-pad for a national event.

3. SUPPORT THE DEVELOPMENT OF COMMUNITY-LED CENTURY PLANS in smaller communities experiencing demographic and economic decline, possibly based on the New Conversations model used in New Brunswick. Customized fact-packs would be provided to each community, and town halls organized for community discussion and identification of action plans to promote population and economic growth.

4. DEVELOP METRICS TO MEASURE AND TRACK SUCCESS (OR OTHERWISE) OVER TIME on both prosperity and population growth, with performance indicators on factors such as: employment levels, newcomer settlement outcomes, infrastructure maintenance and development, support for immigration, etc. An annual report on progress should be made public.

5. ESTABLISH A NATIONAL ADVISORY BODY TO PROVIDE RECOMMENDATIONS TO THE FEDERAL GOVERNMENT ON A *GROWTH PLAN FOR 2100*. Using the output of the above-recommended research consortium and ideas generated from public discussions, the advisory body would develop recommendations on how to best drive and align immigration reform to issues of economic growth, urban and community development and infrastructure planning. The advisory body's mandate should include an assessment of the risks and potential negative consequences of the plan. The advisory body's work should be time-limited to 18 months and a public report would be produced.

Sounds like a nice idea. But what about...

How can we avoid losing the values we cherish under a wave of new immigrants from other cultures, backgrounds and experiences?

Canada is fortunate to have consistently broad public support for immigration. But we recognize that this backing may dissipate if immigration is seen to be carried out in ways that are unfair, or without a commitment to help new immigrants understand our values and integrate into Canadian society.

We believe that there is a powerful economic case for immigration. Canada has tripled its population over a similar timeframe before, and it can do so again. Making Canadians aware of the economic benefits is essential. Part of that is understanding the economic underpinnings of our social programs. The values we cherish were made possible by our prosperity. Keeping them requires a thriving economy.

We need our national conversation on immigration to be non-partisan and founded on facts. That's why we believe we need to start smart planning for a bigger Canada now, to ensure we have the infrastructure and other supports to benefit all Canadians and to ensure that the things that define us can endure.

CONCLUSION

Long-Term Thinking. Starting Now.



Canada is at a critical moment, an inflection point where all of us have a responsibility to try to bend the arc of history in the right direction, so that our children and their children enjoy the same quality of life and equality of opportunity that we have had. That will not happen if, collectively, we keep going for bronze.

Anthony Lacavera and Kate Fillion¹⁵⁵

Setting goals for the end of the century can feel like a quixotic undertaking. It is only human to nod approvingly at the ambition, then put the hard thinking about how to make it happen aside. We have other demands for our attention, no shortage of serious problems to deal with today.

But the questions posed by Canada's demographic prospects *are* a today problem. We already feel the impact of a squeezed workforce: our businesses can't find all the skilled workers they need. Our aging infrastructure affects us *now*, in cracked pipes under city streets, in too-long commutes or in broadband that crawls the further we get from the city.

The fate of future generations will be determined by the choices made by the generation now emerging into its working years. Do they see economic opportunity here at home? Do we offer a quality of life that makes them choose to raise a family here? Or will they have to go elsewhere to find opportunity, to build a business or chase their dreams?

That's why this report is relevant now. The 10 recommendations place our long-term challenge – the need for significant population growth – into the live policy debates of the moment. Improving infrastructure is an urgent problem. The barriers to participation by all Canadians in our shared future can be addressed. The advancement of new century skills, innovation and entrepreneurship to evolve Canada's economy must continue. These issues and other issues need to be acted upon. Today.

Canada's population is destined to grow between now and the end of the century. This report makes the case that our long-term prosperity *depends* upon having more Canadians, with more skilled, well-educated workers, of all sexes, able to generate the wealth that lets us build the kind of country we want. We ask how to best manage that growth. How to do it sustainably. Inclusively. Fairly.

It is a national conversation that must start now.

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