INDUSTRY SURVEY REPORT

Hearing from the experts: Survey findings on municipal approvals, utility connections, and public fast-charging deployment in Canada

Findings from CCIC's 2026 industry survey of public fast-charging deployment

SEPTEMBER 2026

CORE SURVEY FINDINGS

Prepared by the Canadian Charging Infrastructure Council (CCIC-CCIR)

With acknowledgement to The Atmospheric Fund (TAF)

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About CCIC

The Canadian Charging Infrastructure Council / Conseil canadien de l'infrastructure de recharge (CCIC-CCIR) is a not-for-profit organization focused on advancing zero-emission vehicle charging infrastructure across Canada.

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Executive Summary

Public fast-charging projects in existing parking lots require developers to navigate municipal approvals and utility connection processes. Requirements can vary between jurisdictions, creating uncertainty over project timelines, costs, and feasibility. Understanding these experiences can help identify where changes to approval and connection practices could support deployment.

The Canadian Charging Infrastructure Council (CCIC) conducted this survey to examine these barriers and identify practices associated with faster project delivery. Nine organizations participated, including seven charge point operators or charging networks and two engineering, procurement, and construction contractors, with deployment experience across eight provinces. The report examines municipal requirements, approval timelines, project consequences, and opportunities to improve municipal and utility processes.

Respondent experience

- Respondents reported a combined 217 public fast-charging sites commissioned during the preceding 24 months and 602 ports energized during the preceding 12 months.
- 67% had five to ten years of experience deploying public fast charging in existing Canadian parking lots.

Municipal approvals

- Parking minimum requirements were the most frequently reported municipal source of delay, identified by 78% of respondents. Insufficient EV-specific guidance, landscaping requirements, and site plan amendments or minor variances were each cited by 67%.
- 88% reported moderate to extreme variation in approval processes across municipalities within the same province, indicating that experience in one municipality does not necessarily translate into a predictable process elsewhere.

Project consequences

- Seven respondents reported abandoning a combined 54 sites after securing host agreements during the preceding 24 months.
- 71% estimated cost increases of 10–25% on significantly delayed projects that proceeded, highlighting the financial implications of prolonged delivery.

Practices associated with faster approvals

- 71% associated faster municipal approvals with fewer or no permit requirements, while 57% identified a single point of contact.
- Written guidance, online submission and tracking, and pre-approved designs were each selected by 43%.
- When asked how a municipality could allocate C$200,000 to support the greatest number of new stations, 71% favoured dedicated staff and expertise to streamline approvals. The remaining 29% selected incentives for stations deployed by others.

Utility connections

- Pre-reviewed standard designs, dedicated EV connection specialists, and suitable transformer availability were each selected by 50% of respondents as practices that could accelerate deployment.
- Written responses also identified reliable milestone dates and parallel work between utilities and charging operators as opportunities to improve project coordination.

Recommendations

Amend parking requirements and clarify retrofit exemptions

Municipalities should count charging-equipped stalls toward required parking supply and allow spaces occupied by charging equipment without penalising the property's parking count. Establish a minor-works or as-of-right pathway that exempts qualifying charging retrofits from municipal permit requirements and full site plan review. Publish the eligibility criteria and confirm whether a permit is required before applicants undertake detailed design. Review landscaping, screening, and setback requirements for existing parking lots, particularly where they restrict the placement of equipment near utility infrastructure.

Document requirements and establish a three-month decision standard

Publish EV-specific guidance explaining applicable zoning provisions, parking requirements, permit requirements, and the relationship between municipal and electrical safety approvals. Adopt a service standard of three months for a decision on a retrofit application, measured from complete submission. Provide online application submission and tracking so that applicants can monitor progress.

Assign a municipal contact and build staff expertise

Designate a single point of contact to coordinate planning, building, and electrical reviews. Dedicate staff time to developing a streamlined approval process, supported by subject-matter experts who can assist municipal reviewers. Training should address the differences between Level 2 and DC fast charging, equipment siting, and the need for proximity to utility infrastructure. Develop pre-approved designs or templates for recurring installations. Provincial governments should support consistency by establishing common municipal approval requirements for charging retrofits.

Assign utility specialists and pre-review repeat designs

Utilities should designate a named connection specialist with EV-specific technical expertise, accountable from initial enquiry through final connection. Coordinate an operator's multiple projects through that contact. Pre-review standard electrical designs used across an operator's sites to make subsequent reviews more efficient.

Improve transformer availability and identify sites with capacity

Stock and offer 480V or appropriate medium-voltage transformers sized for DC fast-charging loads to reduce reliance on custom orders with long lead times. Publish maps identifying locations with confirmed capacity for connections without distribution upgrades, and provide capacity checks for sites proposed by charging operators.

Publish utility milestones and coordinate delivery

Establish service commitments with published timelines for the initial study, offer to connect, design approval, and energisation. Report performance against those timelines and provide reliable milestone dates for individual projects. Define which utility and charging-operator activities can proceed in parallel, and coordinate them with municipal reviews to reduce gaps between approval, construction, and final connection.

Scope and Methodology

Scope

This report presents findings on the factors that delay or complicate public direct current fast charging (DCFC) projects installed in existing parking lots across Canada. It focuses on the stages following site identification, including municipal approvals, utility connections, project delays, and practices associated with faster delivery.

All graphs are based solely on CCIC survey responses. The report does not incorporate external market, cost, or policy data.

Survey method

Nine responses were received between 13 August and 3 September 2026 through an online survey distributed to CCIC's network of charging industry professionals and organizations. Respondents included seven charge point operators or charging networks and two engineering, procurement, and construction contractors, all with experience in EV charging. Question-level sample sizes vary because not every respondent answered every question.

The survey was voluntary, and the findings reflect the experiences of participating organizations. Results are self-reported, unverified, and not weighted by organization size. Site and port totals may include overlapping projects, while percentages represent respondents to each question, not the share of Canadian projects, unless otherwise explicitly stated. Respondents reported activity across eight provinces, led by Ontario, Quebec, and British Columbia.

The findings draw on substantial practical experience, with two-thirds of respondents having five to ten years of experience deploying public fast charging in existing Canadian parking lots. Respondents reported commissioning 217 sites over the preceding 24 months and energizing 602 ports over the preceding 12 months. This direct involvement provides deep insight into the approval and connection processes encountered in delivering charging projects.

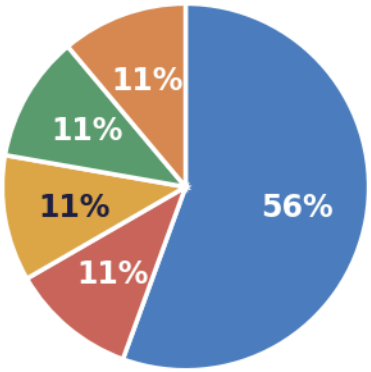
Survey Results

RESPONDENT PROFILE AND DEPLOYMENT SCALE

Your role

9 responses

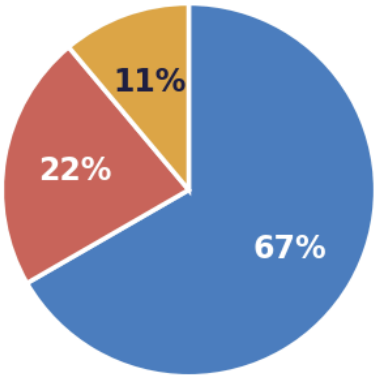
- Executive — 56%
- EV Program Manager (Design, Permitting, pass to Construction PM once permits in hand) — 11%
- Design / engineering — 11%
- Construction / project manager — 11%
- Operations — 11%



Company type

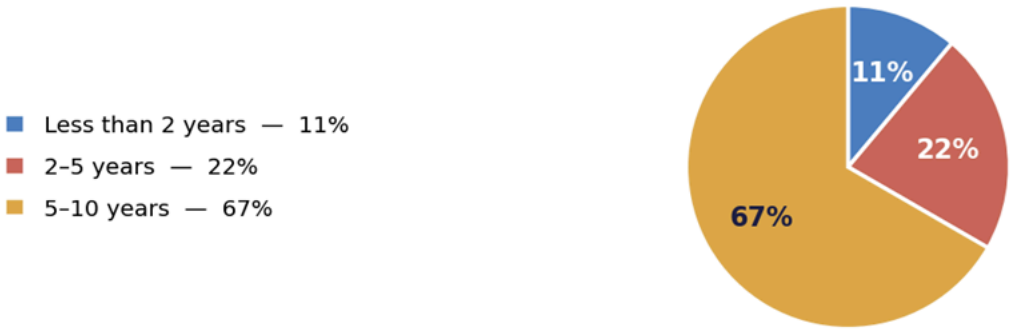
9 responses

- Charging Point Operator (CPO) / charging network - Other — 67%
- EPC contractor — 22%
- Charging Point Operator (CPO) / charging network - Utility-affiliated — 11%



Years deploying public DC fast charging on parking lot retrofits in Canada

9 responses



Provinces and territories you have deployed in (last 24 months)

British Columbia, Alberta, Saskatchewan, Ontario, Quebec, New Brunswick, Nova Scotia, Prince Edward Island

Public DCFC parking lot sites your team has commissioned as operational in the last 24 months (Count each site as 1, regardless of the number of ports)

217 sites in total, reported by 8 of 9 respondents.

Public DCFC parking lot sites your team has cancelled in the last 24 months (Count each site as 1, regardless of the number of ports)

90 sites in total, reported by 8 of 9 respondents.

Public DCFC parking lot sites your team has worked on but not completed or cancelled in the last 24 months (Count each site as 1, regardless of the number of ports)

236 sites in total, reported by 8 of 9 respondents.

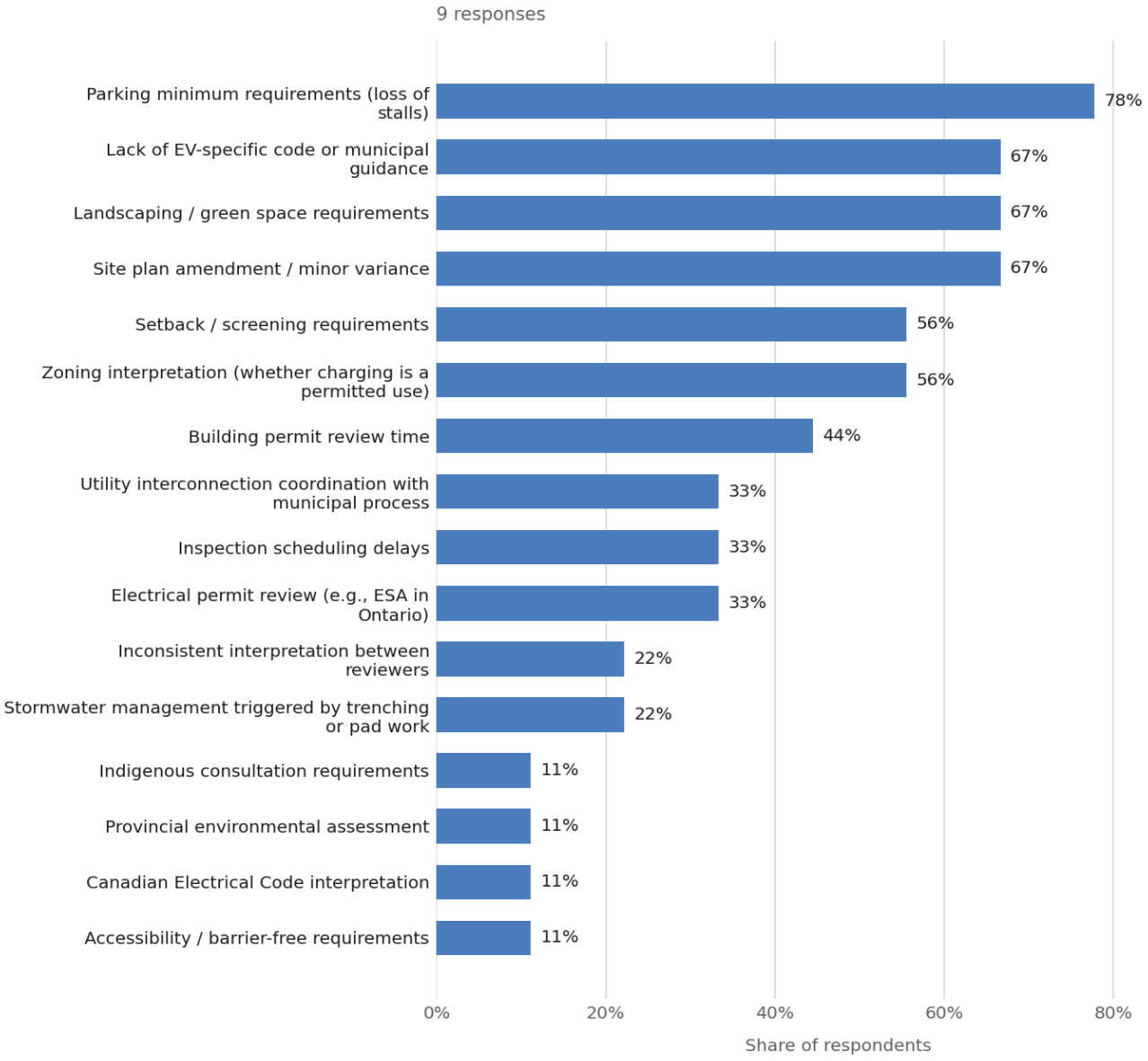
Total ports (able to be used concurrently) energized in the last 12 months (Enter a numerical value)

602 ports in total, reported by 8 of 9 respondents.

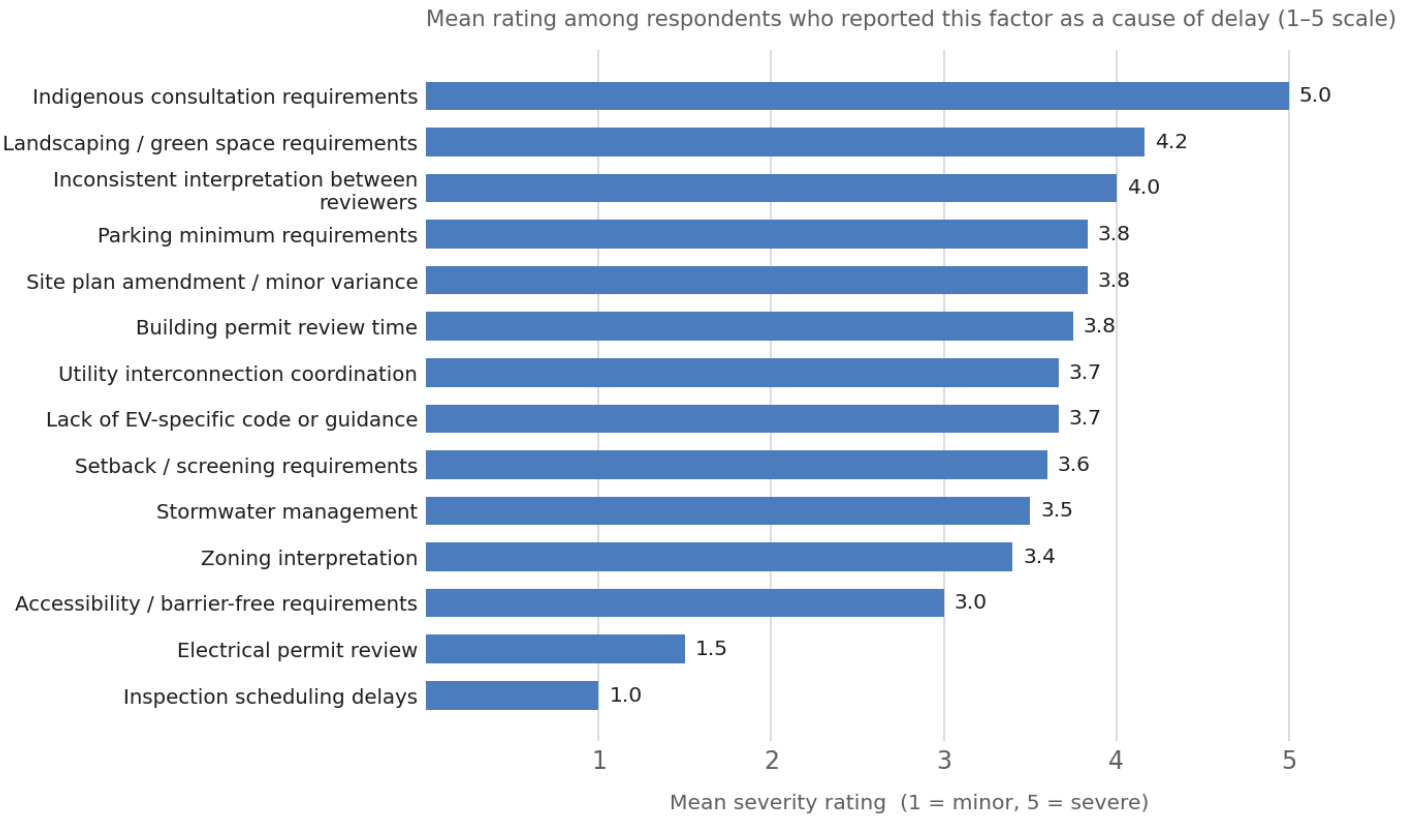
Note: Ports are counted across all sites, including sites reported above, so this figure should not be added to the site counts.

MUNICIPAL APPROVALS AND SOURCES OF DELAY

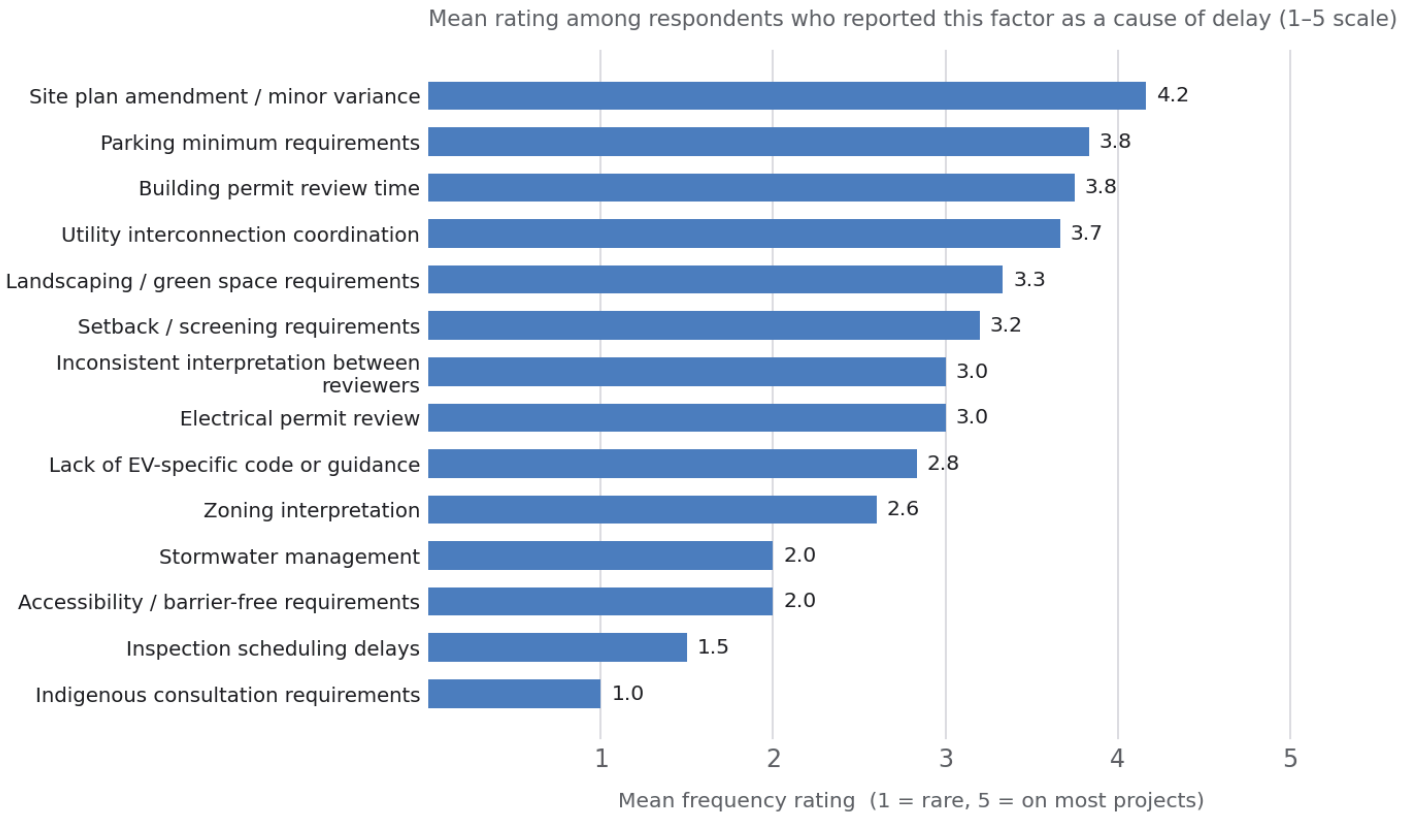
For Canadian parking lot retrofit projects in the last 24 months, which of the following municipally related factors have caused delays on at least one project? (Select all that apply)



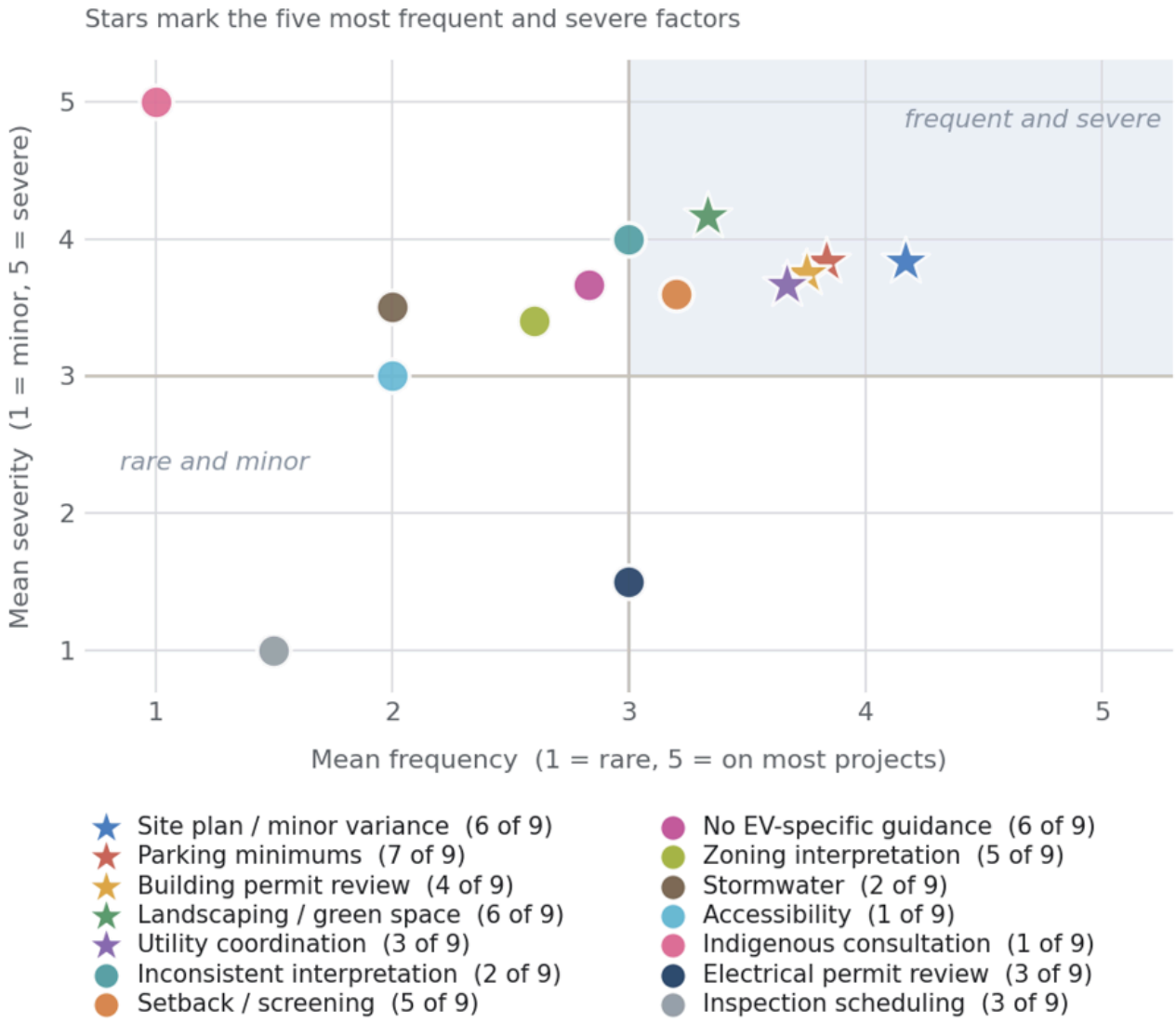
For each issue you experienced in the previous question, please rate the typical SEVERITY of delay it caused (1 = minor (no schedule impacts), 5 = severe (major schedule disruption or even cancellation)



For each issue you experienced, please rate the FREQUENCY with which it causes delays (1 = rare, 5 = on most projects)

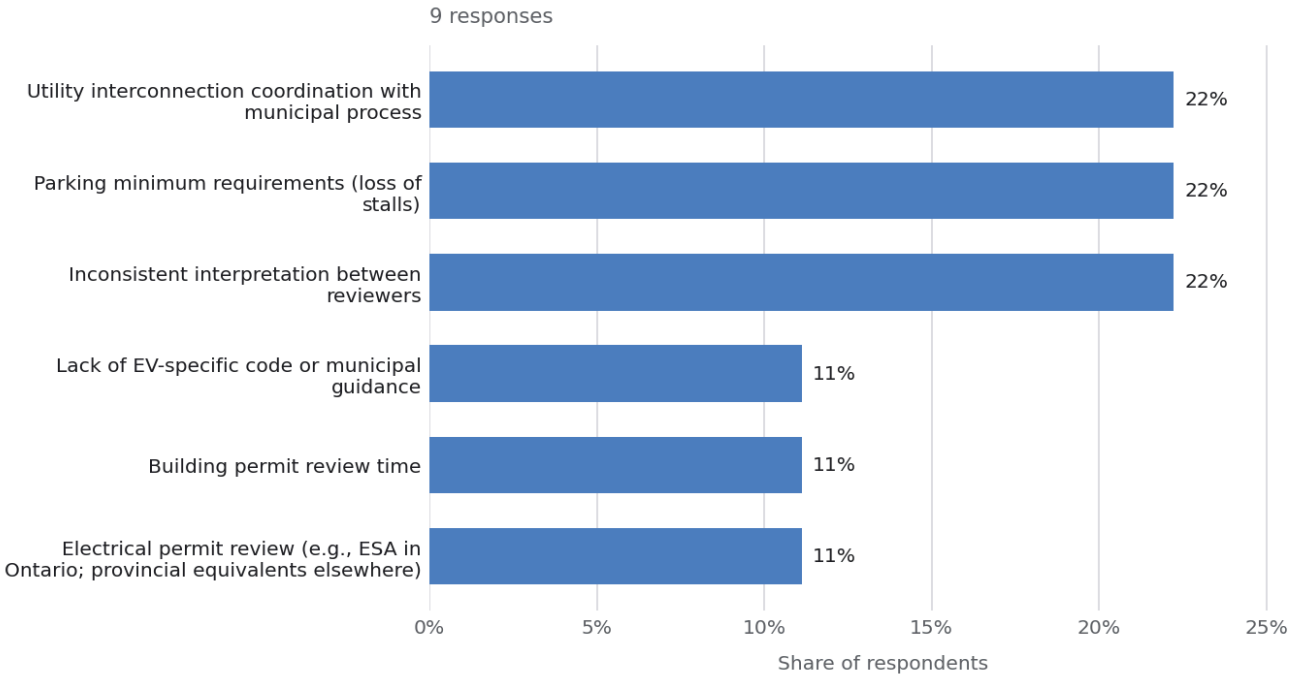


Severity and frequency compared (derived from the two preceding questions)



Each factor is plotted by its mean frequency and mean severity, rated only by the respondents who hit that problem. Colours match the key below; the count in brackets is how many of the 9 respondents selected it. Factors in the upper right are both frequent and severe.

Which single issue, if solved, would most improve your deployment speed on parking lot retrofits?



Briefly explain WHY this issue has the largest impact.

6 responses

Parking stalls used for EV charging equipment take parking spots out of use, but unfortunately, there is nowhere else to put the equipment. Parking stalls lost to allow for an EV charging installation should not negatively impact the property's required parking stall count set by the municipality.

Very long and rigid process with utility companies. Although provincial energy boards try to mandate faster processes, the utility companies seems to be challenge to implement them due to unions' rules.

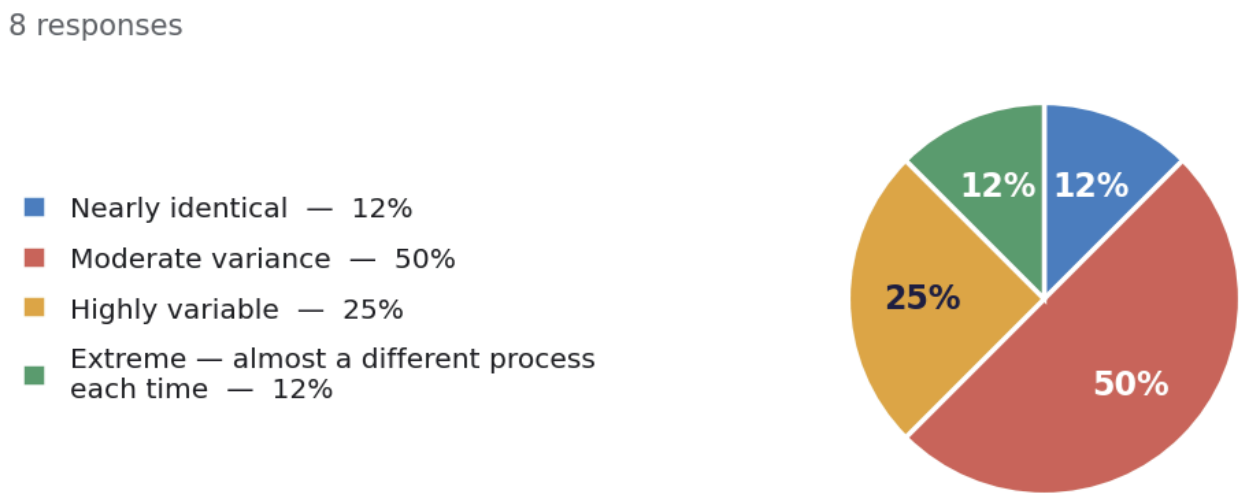
The delays not only impact planning from a feasibility perspective, but they have downstream cost impacts with designers as we continue to work through creative solutions, and have a significant cash flow impact on the ROI as 99% of the capital is up paid in advance of the scheduling for utility connection.

Permitting delays are often related to the lack of understanding of what EV infrastructure is. Urbanism committees often have subjective criteria (i.e. your cabinet is ugly). In addition, they don't understand the impact of needing to be close to Utility. Therefore, it delays their ability to deliver permits.

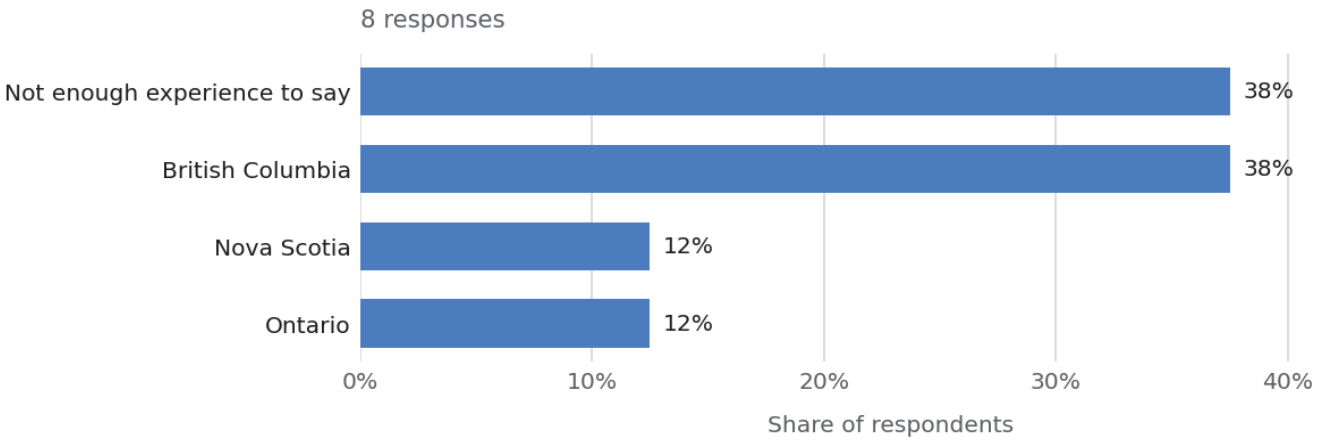
EV-specific code or guidance would eliminate many confusions and misinterpretations.

CONSISTENCY AND TIMELINES

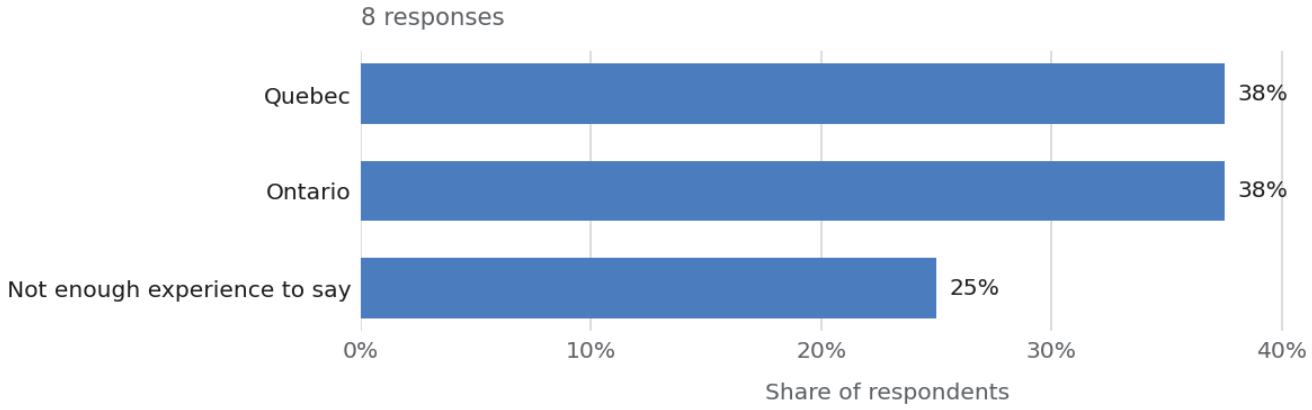
How much does the same approval type vary across municipalities within a single province?



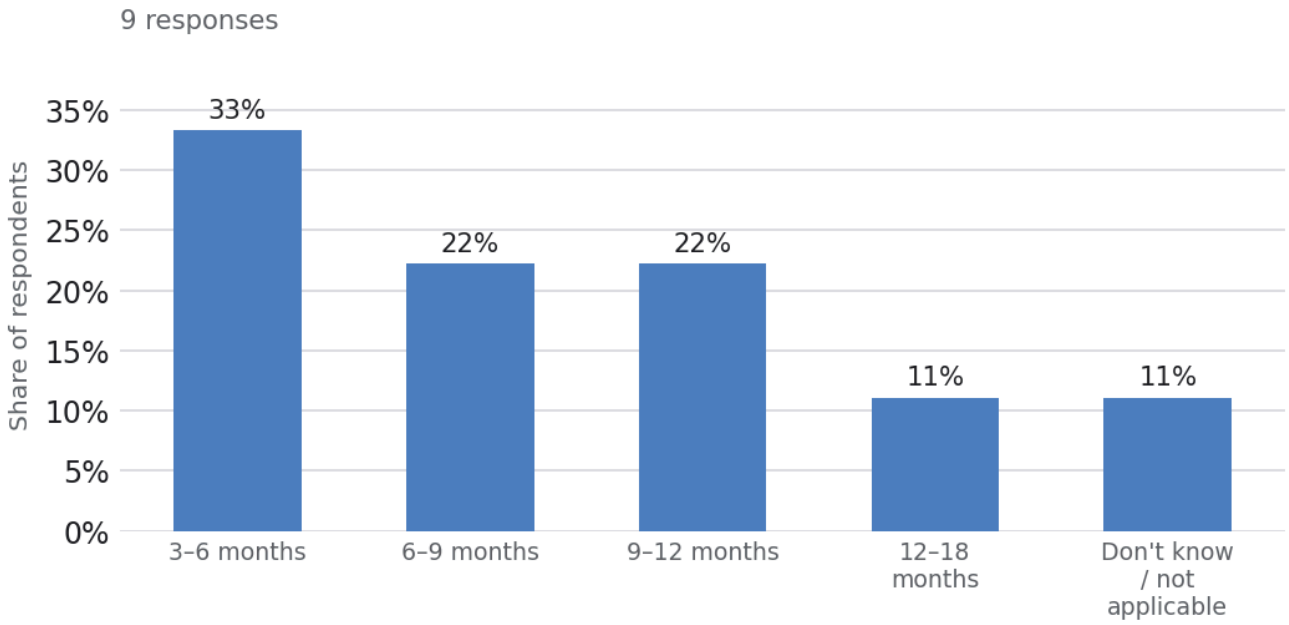
In which province is municipal approval FASTEST in your experience?



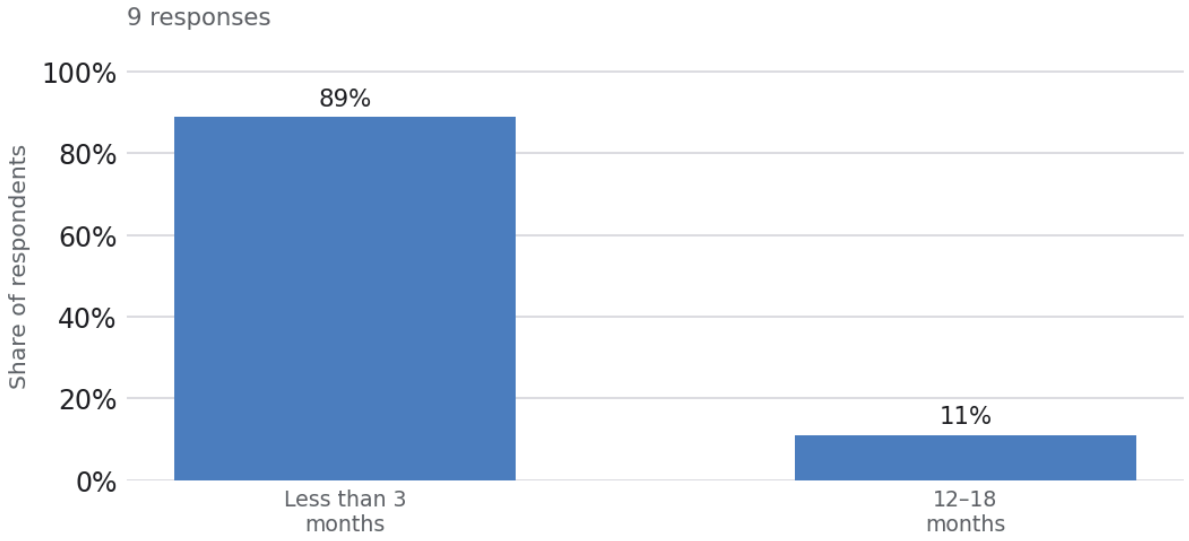
In which province is municipal approval SLOWEST in your experience?



Median time from signed site host agreement to municipal permit / approval issuance



What do you consider a REASONABLE benchmark for municipal permit issuance on a parking lot retrofit?



PROJECT CONSEQUENCES AND ABANDONED SITES

In the last 24 months, how many parking lot retrofit sites in Canada did your organization abandon AFTER securing a site host agreement? (Total numerical value)

54 sites in total, reported by 7 of 9 respondents.

Self-reported and not independently verified. Six of the seven reported at least one abandoned site and one reported none; a single respondent accounts for 25 of the 54. The three cause questions that follow add to 55, one more than this figure, because one respondent's causes exceed their own stated total.

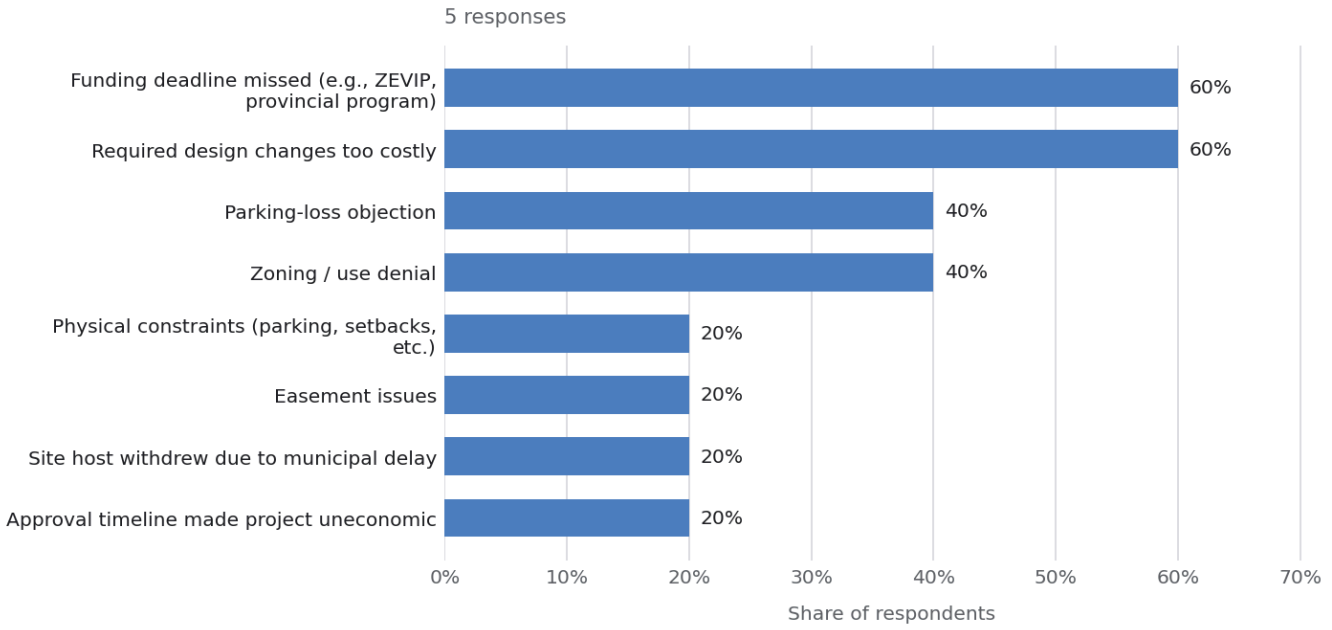
Of those abandoned sites, how many were primarily due to MUNICIPAL approval delays or denials? (Numerical value)

10 sites in total, reported by 7 of 9 respondents.

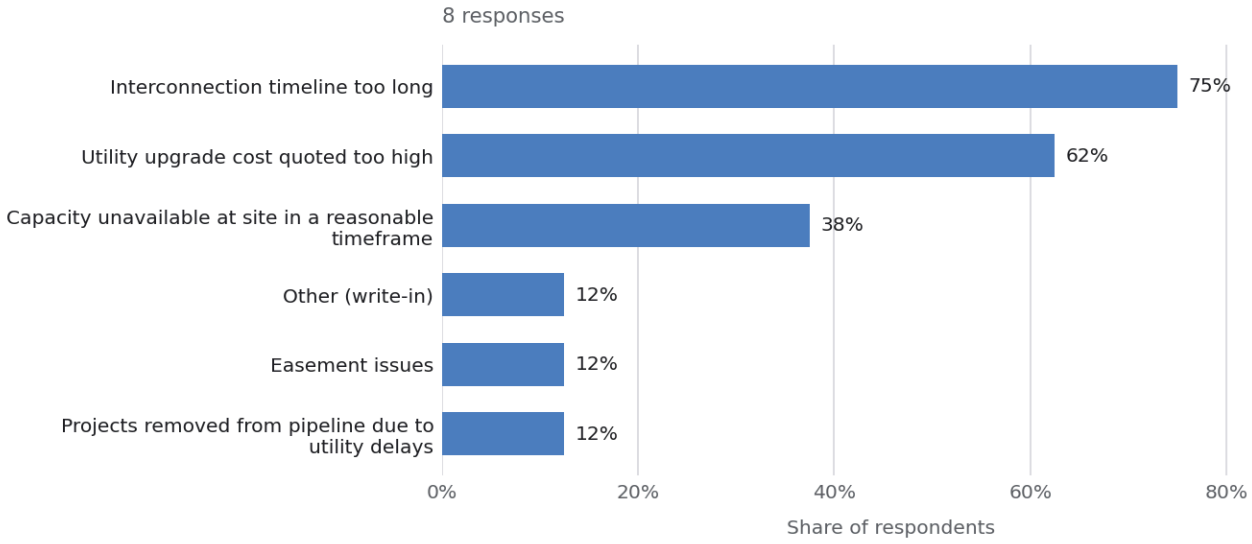
Of those abandoned sites, how many were primarily due to UTILITY interconnection delays or costs? (Numerical value)

17 sites in total, reported by 7 of 9 respondents.

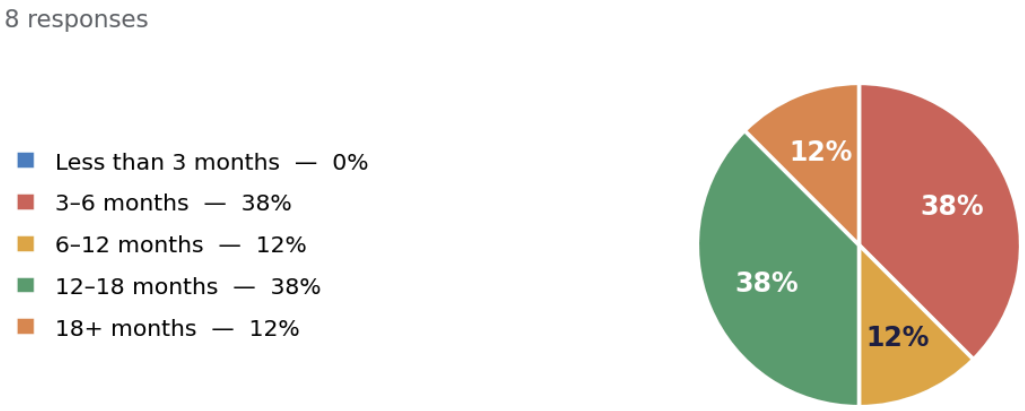
For sites abandoned due to MUNICIPAL causes, select up to the TOP 3 reasons (order does not matter):



For sites abandoned due to UTILITY causes, select up to the TOP 3 reasons (order does not matter):

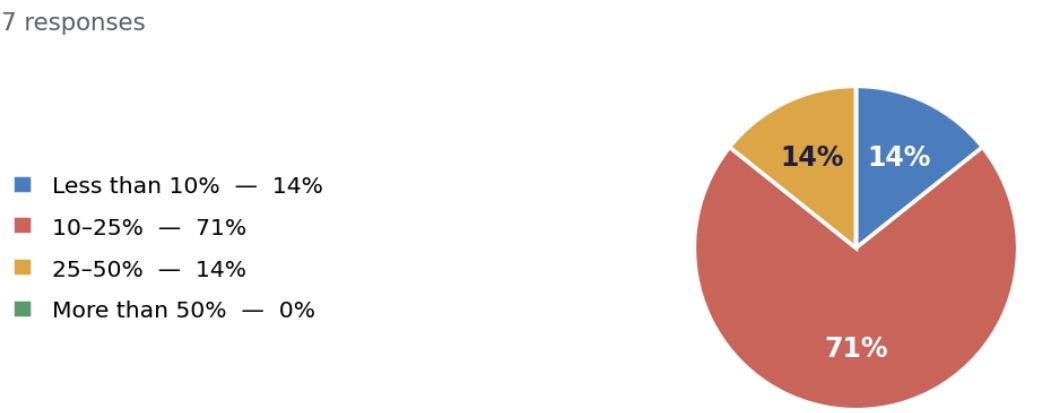


Average delay (in months) on projects that were NOT abandoned but were significantly delayed



Estimated cost escalation on those delayed projects (% of original budget)

7 responses

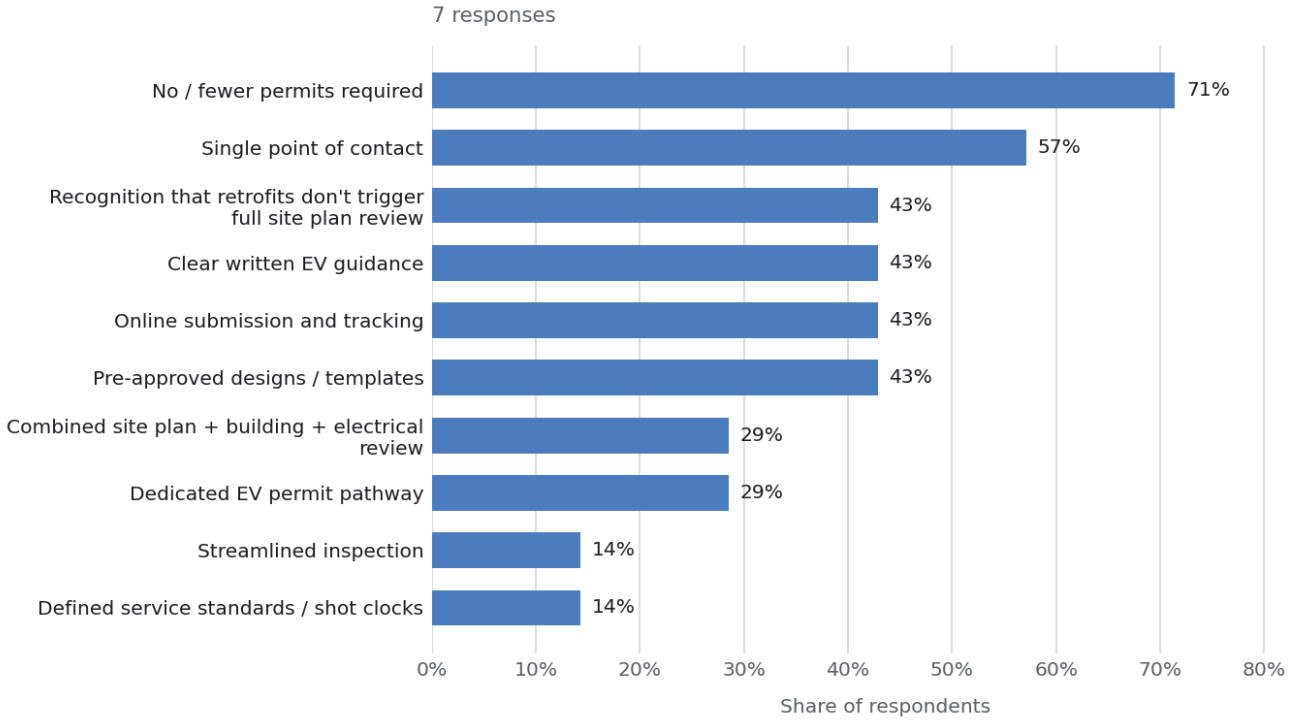


Which Canadian municipalities (by name) do you consider best-in-class for parking lot retrofit EV charging approvals? (Up to 3).

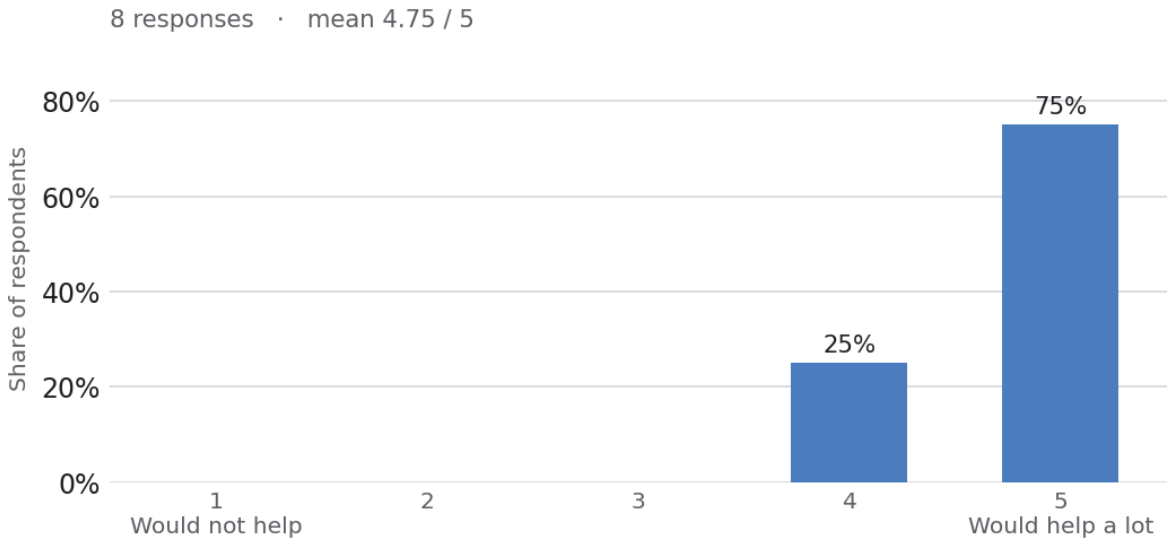
5 responses
Vancouver, Victoria
Regina; Surrey, BC; Langley, BC
Laval
I could name Vaudreuil-Dorion as the best because it does not require a permit but it took us several months to get them to answer that. My answer here would be all the municipalities that does not require permit, i.e. St-Bruno, Mirabel, Yarmouth, etc...

WHAT FASTER PROCESSES HAVE IN COMMON

What specific practices made them faster? (Select all that apply)



Would standardized approval requirements that apply to all municipalities (issued by the provinces) help?



Optional comment on the provincial standardization question:

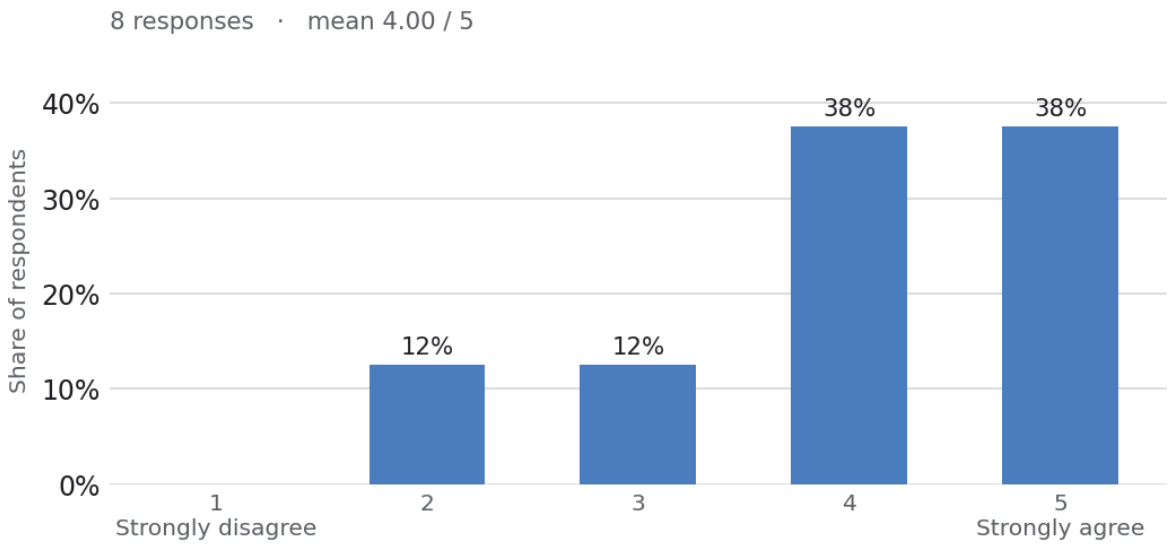
3 responses

They don't have to be standardized.. they need to be documented. A recent designer billed triple for zoning review not understanding what they were reviewing in the same city… this may be different than a different city. But the number of times that I have a final Design, Offer to Connect and ESA in hand and the city tells me to talk to ESA before the building permit…

Suggested standardized rules: Parking stalls used for EV charging and related equipment should not be considered taken out of use in calculating the property's parking stall count requirement set by the municipality.

Very generic question: municipality objections we faced were linked to lack of vision on EV, linked to their Urbanism committee, etc… Not sure if these municipalities would follow provincial standardizations.

For retrofits specifically, should there be a "minor work" or as-of-right pathway that bypasses requirement to get permits at all?



Optional comment on the as-of-right pathway question:

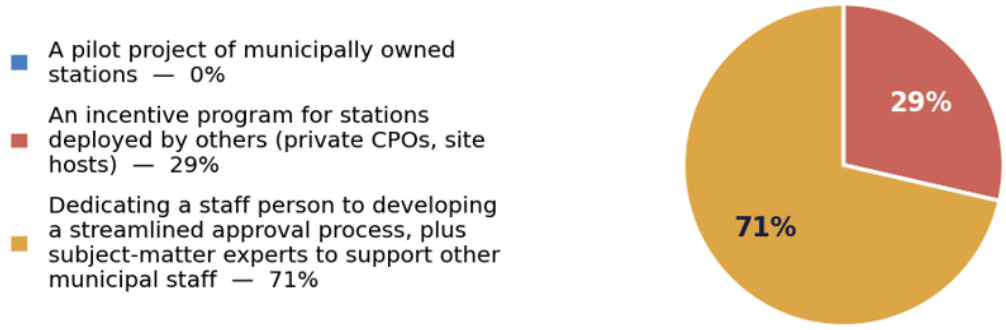
2 responses

We have had sites pushed back as we do not have 3m of grass behind the chargers. So does 3m of grass reduce greenhouse gasses more than having a DC fast charger on site?

EV charging is critical infrastructure for Canada and is being substantially funded by the government of Canada and so it should be afforded the same 'as-of-right' pathway as other provincial and/or federal government owned infrastructure.

If a municipality has $200,000 and is looking to expand public charging in their community, in your experience what is most likely to lead to the most new stations deployed?

7 responses

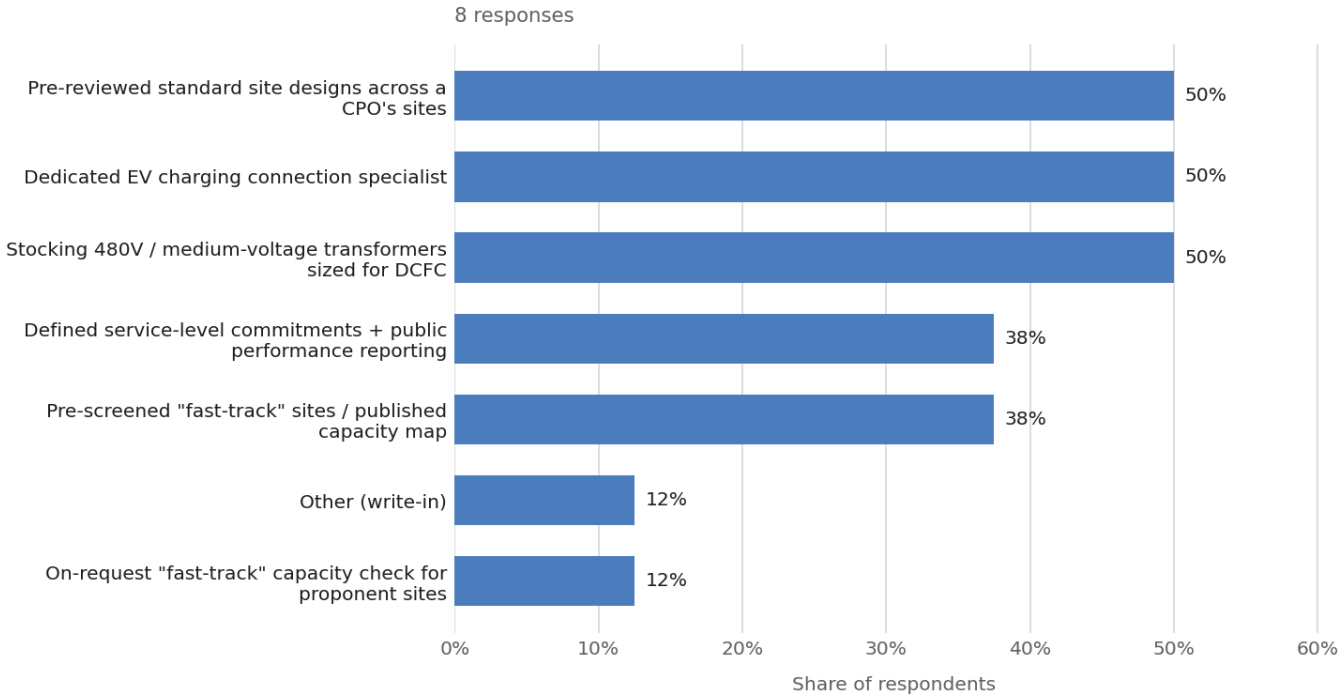


Briefly explain why your selected option would deliver the most stations per dollar.

5 responses
We need to make it easier to install.
Need incentive, 200K$ not enough to build a project.
Having someone who really understands the industry and can lead the way in municipalities would be helpful. Most of the time, people don't even understand the difference between level 2 and level 3 stations.
I would prefer a business case without incentives but currently, we are not close to seeing success without incentives.

UTILITY CONNECTIONS

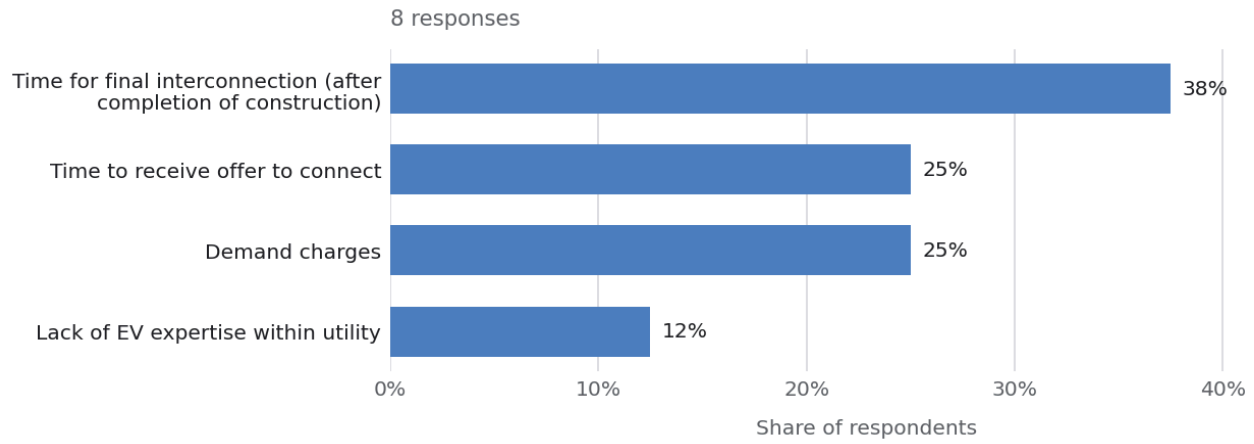
Beyond offer-to-connect requirements (such as in Ontario), which additional utility best practices would most accelerate the connection and deployment of fast charging stations, including financial factors? Please select your TOP THREE.



For your selected practices, please identify any Canadian utilities (by name and province) that are already doing this well. (Up to 3)

5 responses
BC Hydro, Toronto Hydro, Burlington Hydro
BC Hydro, SASK power; Alectra
BC Hydro
None

Which of the following is the SINGLE BIGGEST utility-side barrier to fast-charging deployment in your experience?



What single change by utilities would most accelerate your fast-charging pipeline?

6 responses
There are some utilities that are good that have a dedicated EV team or deal with a single company with multiple EV projects as one client. Other utilities treat each project as standalone even though we have 6 projects with that utility blocks from each other.
Using kWh billing for EV chargers that have less than 20% annual utilization rate
Well defined parallel process allowing the utility company and EVSE operator to minimise the gaps in delivering the projects.
Having reliable dates at the different steps of the process.
Improve delays in connecting.
Stocking and offering 480V transformers

CAPITAL COST

What is the single biggest policy or process change that would unlock more parking lot retrofit deployment in Canada?

7 responses

Streamlined Government Approval with enforcement. As much as some things have changed and for example in Ontario they have timelines... they are still not being met.
Policy change to provide government funding that supports the operation of EV charging infrastructure and its very high fixed costs while utilization is low until EV adoption and utilization achieves the necessary growth to support EV charging operations on its own without the need for government support.
Parking ratio requirement not excluding EVSE stalls from retail parking requirements
Having a standard procedure for all the municipalities and distinguishing level 2 and level 3 charging stations on the reglementations.
Relieving utility connection bottlenecks, revision of demand charges, and any policy to support more EVs on the road.
Give financial penalties to utilities who delay each step of allowing final interconnection.