Market Update

June 2026



Infrastructure Ontario

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Message from the President & CEO

I'm pleased to share Infrastructure Ontario's (IO) June 2026 Market Update. This update builds on our track record and reinforces the government's historic investment of $236 billion, the most ambitious capital plan in the province's history. These projects play a critical role in building and modernizing public infrastructure to help protect Ontario's communities and strengthen the economy.

This Market Update provides an overview of major capital projects, updated information on the Capital Repair Program pipeline for the province's land and building assets, as well as new details for the Transit-Oriented Communities Program.

Over the past year, IO has undertaken an organizational transformation to become more efficient, client-focused and innovation-enabled. Through a One IO approach, we will transform IO into a people-focused organization that delivers greater value to government and strengthens client relationships. Our renewed three-year strategy focuses on streamlining operations with updated structures, tools and processes, while adopting innovative technologies to improve quality, speed and cost-effectiveness. One example is the planned use of digital twins on select projects later this summer, incorporating building information modeling requirements.

This transformation will allow IO to scale as needed to meet government priorities, supported by a sustainable operating model, enabling us to provide a comprehensive suite of aligned infrastructure and real estate services. As the government navigates U.S. tariffs and global uncertainties, IO continues to comply with the Buy Ontario Act to prioritize Ontario and Canadian labour and suppliers wherever feasible.

I want to thank our industry partners for their ongoing partnership and collaboration as we work to deliver projects faster and more cost-effectively. This collaboration is essential to delivering some of Ontario's largest and most complex public infrastructure projects that help create meaningful outcomes for communities across the province.

I also extend my sincere appreciation to our Board of Directors and my heartfelt thanks to the dedicated IO employees whose hard work and commitment are fundamental to IO's success. Their efforts drive our organization forward, shape Ontario's future and deliver world-class infrastructure that makes a meaningful difference in people's lives every day.

We are proud to build IO's legacy and deliver transformative infrastructure for the people of Ontario.

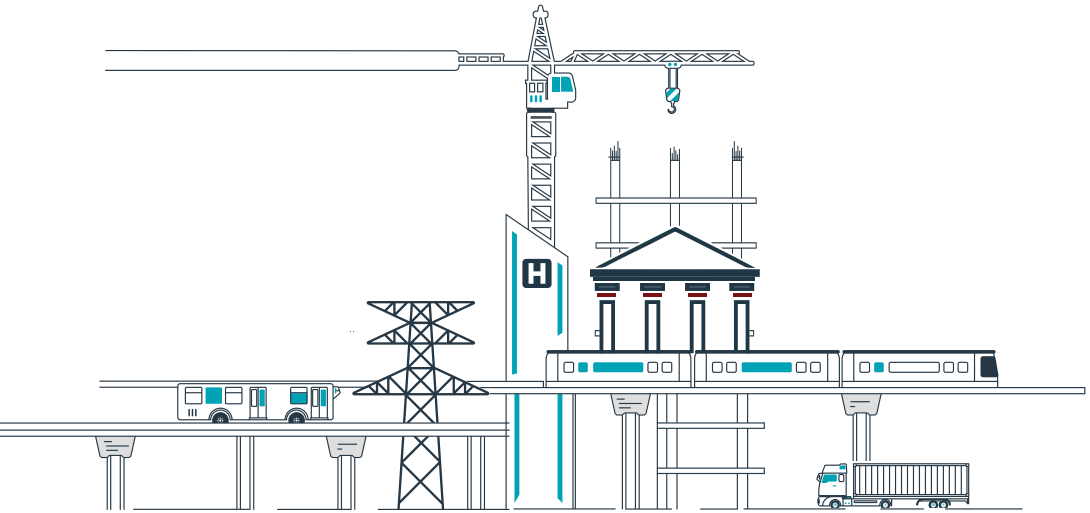
Angela Clayton
President and Chief Executive Officer
Infrastructure Ontario

Market Update Overview

IO is leading the procurement and delivery of 24 projects in pre-procurement and active procurement phases, representing a combined estimated design and construction value of more than $25 billion. The Market Update also includes 19 government-announced projects that are in the early planning phase.

New Projects:

- Ontario Provincial Police Detachment and Ontario Place Administrative & Maintenance Complex
- University Health Network Proton Beam Therapy Facility



Major Projects Reaching Substantial Completion:

- Finch West LRT
- Eglinton Crosstown LRT

Major Projects Reaching Contract Execution:

- Stevenson Memorial Hospital Redevelopment Project
- New Ontario Science Centre Facility (Previously referred to as: Relocation of Ontario Science Centre to Ontario Place)
- Ontario Place Redevelopment Parking Structure (Previously referred to as: Ontario Place Parking Solution)

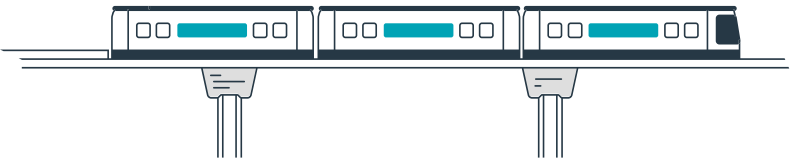
Projects moved from Pre-Procurement to Active-Procurement:

- Oak Valley Healthcare – Uxbridge Redevelopment
- Windsor Regional Hospital – Fancsy Family Hospital Project: Contract 1 Diagnostic and Treatment Block
- Brockville Correctional Complex / St. Lawrence Valley Correctional and Treatment Centre

Transit

Projects	Project Phase	Model	PDC/TA/AOR Procurement	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Design & Construction Cost
Yonge North Subway Extension - Stations, Rail and Systems	Active Procurement	Alliance	Awarded	Oct 2025	**May 2026**	**ADA: Jan - Mar 2027** **PAA: Jan - Mar 2029**	Toronto / York Region	>$4B

Projects in Planning Phase: Transit	
Eglinton Crosstown West Extension Airport Segment	Line 4 Extension (Sheppard East) Subway
Hamilton LRT - Stops, Rail and Systems	



Health & Children's Treatment Centres

Projects	Project Phase	Model	PDC/TA/AOR Procurement	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Design & Construction Cost
Lakeridge Health – Bowmanville Hospital Redevelopment	Active Procurement	DBF	Awarded	Aug 2024	Sep 2025	**Oct - Dec 2026**	Bowmanville	$500M - $1B
North York General Hospital – Inpatient Redevelopment	Active Procurement	Alliance	N/A	Jan 2025	Aug 2025	ADA: Jul - Sep 2026 PAA: Jan - Mar 2028	Toronto	$1B - $2B
Oak Valley Healthcare – Uxbridge Redevelopment	**Active Procurement**	DBB	N/A	**Dec 2025**	**Jun 2026**	Jan - Mar 2027	Uxbridge	<$200M
Windsor Regional Hospital – Fancsy Family Hospital Project: Contract 1 Diagnostic and Treatment Block	**Active Procurement**	DBFM	Awarded	**Jan 2026**	**Oct - Dec 2026**	**Oct - Dec 2027**	Windsor	**TBD**
Runnymede Healthcare Centre Post-Traumatic Stress Injury Centre of Excellence - Caledon Residential Treatment Facility	Pre-Procurement	DBB	N/A	**Jul 2026+**	**Oct - Dec 2026**	**Jul - Sep 2027**	Caledon	<$200M
Runnymede Healthcare Centre Post-Traumatic Stress Injury Centre of Excellence - Toronto Ambulatory	Pre-Procurement	DBB	N/A	**Jul 2026+**	**Apr - Jun 2027**	**Oct - Dec 2027**	Toronto	<$200M
Collingwood General and Marine Hospital	Pre-Procurement	DBF*	Awarded	Apr - Jun 2027	Oct - Dec 2027	Oct - Dec 2028	Collingwood	TBD

Health & Children's Treatment Centres

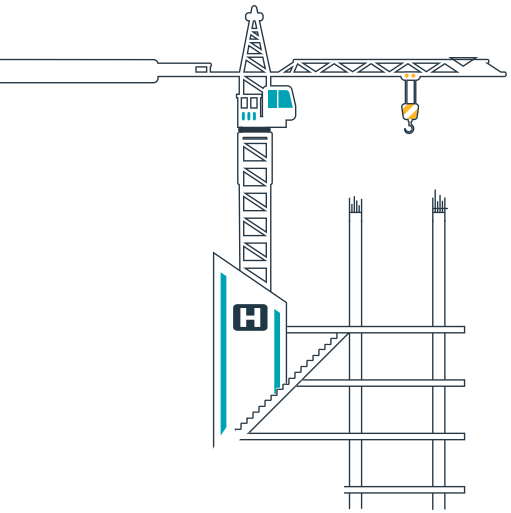
Projects	Project Phase	Model	PDC/TA/AOR Procurement	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Design & Construction Cost
Windsor Regional Hospital – Fancsy Family Hospital Project: Contract 2 Inpatient Tower	**Pre-Procurement**	**PDB (Target Price)**	**Awarded**	**Apr - Jun 2027**	**Oct - Dec 2027**	**DPA: Oct - Dec 2028 CE: Jan - Mar 2030**	**Windsor**	**$1B - $2B**
Muskoka Algonquin Healthcare – Bracebridge and Huntsville Redevelopments	Pre-Procurement	DBB	**Jul - Sep 2026**	Oct - Dec 2027	Apr - Jun 2028	**Jan - Mar 2029**	Bracebridge and Huntsville	$500M - $1B
The Hospital for Sick Children - Ambulatory Care Tower	Pre-Procurement	DBFM	**Jul - Sep 2026**	**Oct - Dec 2027**	**Apr - Jun 2028**	**Apr - Jun 2029**	Toronto	$1B -$2B
Hamilton Health Sciences – Juravinski Hospital Redevelopment	Pre-Procurement	TBD*	Awarded	**Jan - Mar 2028**	**Jul - Sep 2028**	**Jul - Sep 2029**	Hamilton	$500M - $1B
Unity Health Toronto - St. Joseph's Health Centre Redevelopment	Pre-Procurement	DBF*	**Oct - Dec 2026**	**Apr - Jun 2028**	**Oct - Dec 2028**	**Oct - Dec 2029**	Toronto	$1B -$2B
Scarborough Health Network Birchmount Redevelopment Phase 1A	Pre-Procurement	DBF*	**Jan - Mar 2027**	**Jul - Sep 2028**	**Jan - Mar 2029**	**Jan - Mar 2030**	Toronto	$500M - $1B
Lakeridge Health – Broader Redevelopment	Pre-Procurement	TBD*	TBD	> 5 years	> 5 years	> 5 years	TBD	TBD

* Infrastructure Ontario continues to review these projects for the most suitable delivery model (inclusive of procurement strategy and contract form) in recognition of continuing market feedback.

+ RFQs for Runnymede Healthcare Centre Post-Traumatic Stress Injury Centre of Excellence - Caledon Residential Treatment Facility and Toronto Ambulatory will be bundled.

Health & Children’s Treatment Centres

Projects in Planning Phase: Health and Children’s Treatment Centres		
Brant Community Health Care - Redevelopment	Lansdowne Children's Treatment Centre Redevelopment Project	The Hospital for Sick Children - Critical Care Tower
Hotel Dieu Shaver (St. Catharines)	Royal Victoria Health Centre - Phase 1 Redevelopment	**University Health Network Proton Beam Therapy Facility**
Kingston Health Sciences Centre - Kingston General Hospital Redevelopment	Southlake Regional Health Sciences - Phase 1 Redevelopment	Waterloo Regional Health Network Redevelopment Project
Lake of the Woods District Hospital (Kenora) - Redevelopment Project	Sunnybrook Health Sciences - Critical Care Tower	William Osler Health System - Radiation Oncology Project



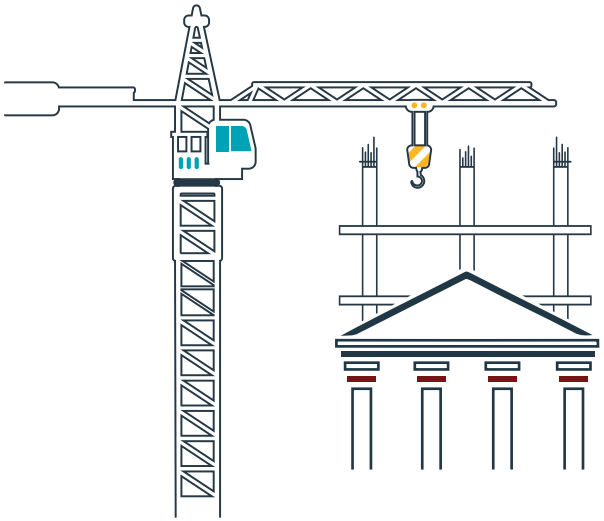
Public Works & Justice

Projects	Project Phase	Model	PDC/TA/AOR Procurement	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Design & Construction Cost
Quinte Detention Centre	Active Procurement	DBB	Awarded	Oct 2024	Nov 2025	**Oct - Dec 2026**	Napanee	$200M - $499M
OPP Modernization Phase 3 - Part 1	Active Procurement	DBF	Awarded	May 2025	**Mar 2026**	Jan - Mar 2027	Various	$500M - $1B
Ontario Place Landscape and Public Realm Construction	Active Procurement	CMAR	Awarded	Jun 2025	**Jan 2026**	Jul - Sep 2026	Toronto	$200M - $499M
MECP / MLITSD Science Complex	Active Procurement	DBFM	Awarded	Sep 2025	**Jul - Sep 2026**	**Oct - Dec 2027**	Oakville	$200M - $499M
Brockville Correctional Complex / St. Lawrence Valley Correctional and Treatment Centre	**Active Procurement**	DBB	Awarded	**Mar 2026**	Oct - Dec 2026	**Jul - Sep 2027**	Elizabethtown-Kitley	< $200M
Ontario Provincial Police Detachment and Ontario Place Administrative & Maintenance Complex	**Active Procurement**	**DB**	**N/A**	**Apr 2026**	**Jul - Sep 2026**	**Jul - Sep 2027**	**Toronto**	**<$200M**
OPP Modernization Phase 3 - Part 2	Pre-Procurement	DBF	Awarded	**Oct - Dec 2026**	**Apr - Jun 2027**	**Apr - Jun 2028**	Various	$500M - $1B
Eastern Ontario Correctional Complex	Pre-Procurement	DBF	Awarded	**Jan - Mar 2027**	**Oct - Dec 2027**	**Jan - Mar 2029**	Kemptville	$200M - $499M

Public Works & Justice

Projects	Project Phase	Model	PDC/TA/AOR Procurement	Issue RFQ	Issue RFP	Contract Execution	Location	Estimated Design & Construction Cost
St. Thomas - OPP Detachment	Pre-Procurement	CCDC 2	Awarded	TBD	TBD	TBD	St. Thomas	<$100M
Ontario Emergency Preparedness and Response Headquarters	**Planning with Delivery Model Approval**	**DBB**	**N/A**	**Project details to be confirmed**			**Toronto**	**TBD**

Projects in Planning Phase: Public Works and Justice	
New Halton Region Courthouse	Ontario Provincial Police Academy
Ontario Police College	



Definitions & Chart Legend

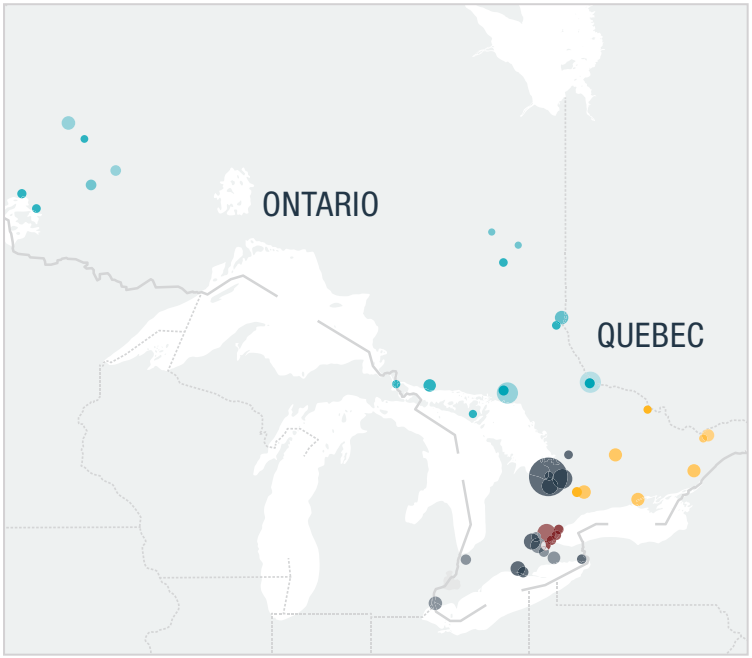
General Definitions	
Note: Bold-face text denotes a change from the previous Market Update	
ADA	Alliance Development Agreement
AOR	Architect of Record
CE	Contract Execution
DPA	Development Phase Agreement
PAA	Project Alliance Agreement
PDC	Planning and Design Consultant
RFP	Request for Proposals
RFQ	Request for Qualifications
TA	Technical Advisor

Project Phases	
Planning	Project has received Government approval to proceed with planning for the project. Where Government has approved scope and delivery model, the delivery model will be noted.
Pre-Procurement	Project has received Construction approval but is not yet in the market.
Active Procurement	Project is in the market through an RFQ or RFP to qualify parties or receive proposals.

Delivery Model Definitions	
Note: The progressive procurement strategy may be compatible with various contract forms and pricing approaches. Where applicable, notations have been made to indicate: 1. whether the contract form is being procured in a progressive fashion involving a development phase prior to construction and/or 2. whether the contract for construction is intended to be delivered on a target-price basis.	
BF	Build Finance
DB	Design Build
DBB	Design Bid Build
DBF	Design Build Finance
DBFM	Design Build Finance Maintain
CCDC 2	Canadian Construction Documents Committee 2
CMAR	Construction Management At Risk

Estimated Design & Construction Cost
Note: The range values shown are inclusive of the estimated design and construction values within approved project budgets only. The range values shown exclude the following: 1. other contract costs such as financing and long-term maintenance costs; and 2. costs to be paid by the Contracting Authority outside of the construction contract such as land, equipment, third party advisors, and contingencies.

Pipeline of MOI* Capital Repair Projects (Future Years)



Project Type	Central	East	North	Southwest	Total
Electrical Service and Distribution	8	1	15	2	26
Elevators	1	0	0	0	1
Exterior Walls and Windows	1	1	4	7	13
Exterior Work		5	6	4	15
Fire Life Safety	3		3		6
HVAC	5	2	5	11	23
Plumbing		1	8	8	17
Roof Coverings	2	4	3	20	29
Sanitary Waste	1	0	0	0	1
Site Work	0	0	1	0	1
Total	21	14	45	52	132

Projects by Region:

- Central
- East
- North
- Southwest

*Ministry of Infrastructure

Projects on the Capital Repair Program pipeline are managed through IO's Project Management Service Provider (PMSP) and Asset Renewal and Client Works (ARCW) programs based on complexity, with high complexity being delivered by Colliers and low and medium complexity being delivered by BGIS. Companies interested in bidding on upcoming capital repair projects should pursue appropriate vendors of record lists. Colliers Project Leaders VOR will refreshed in Spring 2027; however, interested proponents may reach out to Colliers any time at copl-ioprocurement@colliersprojectleaders.com should they wish to initiate discussions in advance of the refresh. BGIS Vendor Prequalification for VOR is always open to new proponents and can be reached at ioprocurement@bgis.com.

Pipeline of MOI* Capital Repair Projects (Future Years)

Estimated Number of Projects per Value Range

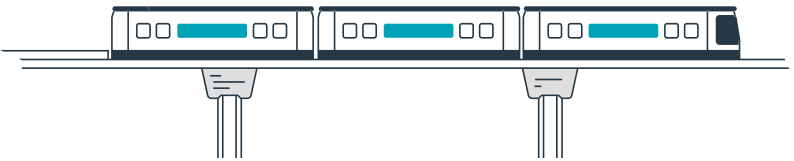
Project Type	Up to $100k	$100k - $500k	$500k - $1M	$1M - $5M	Over $5M	Total
Roof Coverings	2	10	3	14	0	29
HVAC	5	6	5	5	2	23
Electrical Service and Distribution	14	9	0	3	0	26
Exterior Walls and Windows	5	5	0	2	1	13
Elevators	1	0	0	0	0	1
Exterior Work	9	4	2	0	0	15
Fire Life Safety	6	0	0	0	0	6
Plumbing	11	6	0	0	0	17
Sanitary Waste	0	1	0	0	0	1
Site Work	1	0	0	0	0	1
Total	**54**	**41**	**10**	**24**	**3**	**132**

The Development of this priority-ranked pipeline of projects is based on evidence-based information from on-site inspections. Projects in the proposed pipeline may engage the services of General Contractors or Trades directly.

*Ministry of Infrastructure

Transit-Oriented Communities Market Offering

Development Market Offering	Location	Development Type	Proposed Gross Floor Area	Issue Market Offer
Eastern Avenue	East Toronto	Primarily Residential	~10,000 m²	**Jun - Sep 2026**
Exhibition	West Toronto	Primarily Residential	~70,000 - ~110,000 m²	**Oct 2026 - Mar 2027**
Gerrard-Carlaw South	East Toronto	Primarily Residential	~110,000 m²	**Oct 2026 - Mar 2027**
Corktown	Downtown	Primarily Residential	~190,000 m²	**Oct 2026 - Mar 2027**
Guildwood	**Toronto (Scarborough)**	**Mixed-Use Residential**	**~192,500 m²**	**Jul - Dec 2027**
Cosburn	East York	Primarily Residential	~45,000 m²	2027
Clarkson	**Mississauga**	**Mixed-Use Residential**	**~161,000 m²**	**2028**
Cooksville	**Mississauga**	**Mixed-Use Residential**	**~149,500 m²**	**2028**
Lawrence East	Scarborough	Primarily Residential	~55,000 m²	**2029**
Pape	East Toronto	Primarily Residential	~35,000 m²	**2029+**
Thorncliffe Park	East York	Residential, Office, Retail	~215,000 m²	**2029+**



IO publishes the Market Update as part of the Ministry of Infrastructure's transparent engagement with the market regarding the government's pipeline of major projects.

For more information:

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