Canada Strong Fund
Critical Minerals and Nuclear Energy

Defence Industrial Strategy | Sovereign Capital | Nuclear Sovereignty | Processing Technologies

Prepared by

NORTHERN ARC PUBLIC AFFAIRS

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CONFIDENTIAL

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> *"We are realising Canada's full potential in clean and conventional energy to power Canadian homes, build Canadian businesses, and reinforce Canadian sovereignty."*
>
> **The Rt. Hon. Mark Carney, Prime Minister of Canada**
>
> Canada Strong Fund Announcement | April 27, 2026

$25B	$2B	$443M	$40M
Canada Strong Fund	Critical Minerals Sovereign Fund	Critical Mineral Processing Technologies	DND Microreactor Program

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EXECUTIVE SUMMARY

The federal government deployed four major strategic instruments in the last week of April 2026 alone: the Canada Strong Fund ($25 billion sovereign wealth fund), the Nuclear Energy Strategy (four-pillar national strategy for the first time in a generation), the DND Microreactor Program ($40 million for Arctic sovereignty applications), and the GPI Defence Industrial Strategy top-up ($50 million for allied critical mineral projects). These are not incremental additions to an existing program landscape. They represent a structural repositioning of federal capital toward energy sovereignty, critical mineral security, and defence industrial capacity.

The combined federal investment envelope for Canadian companies in critical minerals, nuclear energy, and defence-adjacent sectors now exceeds $27 billion in new capital vehicles deployed since January 2026. Most companies operating in these sectors are aware of IRAP or watching for RFPs. They are not positioned at the ministerial, Deputy Minister, or PMO level where these capital decisions are actually shaped, and where directed intake instruments are decided before they are publicly announced.

This briefing maps the federal funding and positioning landscape for Canadian companies in critical minerals, uranium, nuclear energy, SMR technology, defence industrial, and adjacent sectors. It outlines a strategic roadmap to capture $3 million to $25 million in federal contributions, tax credits, and lending, plus the possibility of equity co-investment through the Canada Strong Fund and Critical Minerals Sovereign Fund.

Northern Arc's value is not paperwork. It is political positioning at the ministerial and PMO level that determines which companies are identified as strategic partners by the DIA before its Strategic Partner framework is formalized, which projects receive directed intake consideration through the GPI Defence Industrial top-up, and which proponents are invited into the Canada Strong Fund's co-investment framework before formal processes are announced.

WHAT MAKES THIS SECTOR DIFFERENT IN THE FEDERAL LANDSCAPE

Equity co-investment vehicles now exist. The Canada Strong Fund and the Critical Minerals Sovereign Fund are not grant programs. They take equity positions and deploy debt instruments alongside offtake contracts in commercially viable, nationally strategic projects. The companies that are in conversation now, before intake structures are formalized, have a structural advantage over those who wait for RFPs.

Defence framing changes the access pathway. Critical minerals designated under the Defence Production Act, nuclear framed through DND's microreactor program, and dual-use processing technologies funded through the Defence Industrial Strategy all open DND and DIA engagement pathways that civilian program streams do not. Companies that frame their work as a sovereignty solution, not a commercial opportunity, reach a different set of decision-makers.

The directed intake window is open right now. The GPI Defence Industrial top-up uses a directed intake pathway, invitation only, where NRCan identifies projects through proponent engagement. The DIA Strategic Partner framework launches summer 2026. The Nuclear Energy Strategy input window is open until the strategy is published by year-end. Companies that are in conversation before these frameworks close will be referenced inside them. Companies that arrive after will be applying to the competitions those frameworks create.

Each of these three dynamics carries a defined window that closes when governance is set, frameworks launch, or strategies publish. Companies that engage during formation are not competing with those who engage six months later; they are operating in a structurally different access environment.

THE COMPETITIVE GAP: WHY URGENCY MATTERS

Comparable Canadian companies are securing $5 million to $25 million through stacked contributions from GPI, IRAP, NGen, and RDA programs, alongside SR&ED and CMETC tax credits. The Critical Minerals Sovereign Fund is deploying equity in 2026. The DIA Strategic Partner framework launches this summer. The Nuclear Energy Strategy is open for input now. These are not hypothetical programs. They are active, funded, and moving.

The question is not whether your company deserves this support. The question is whether your organization will be identified as a strategic partner before the intake frameworks close.

HOW FEDERAL DECISIONS ARE ACTUALLY MADE

Before examining specific programs, it is essential to understand how federal decisions in this sector actually happen. Program guidelines describe eligibility and process. They do not describe how decisions are made. The gap between formal process and actual decision-making is where opportunities are won or lost, and where Northern Arc operates.

The Three Levels of Federal Decision-Making

Political Level: Ministers and Ministerial Staff. Ministers set strategic priorities for their departments. Minister Hodgson at NRCan determines which organizations represent strategic energy and mineral priorities. Minister McGuinty at DND shapes which companies are positioned as defence industrial partners. Minister Champagne at Finance oversees the Canada Strong Fund's deployment mandate. Ministerial staff filter what reaches the Minister and shape how issues are framed. When a Minister's office understands that a company represents strategic sovereignty value, that understanding flows through the department and, critically, into directed intake and unsolicited proposal pathways that never appear in public program guidelines.

Bureaucratic Level: Deputy Ministers and ADMs. Deputy Ministers and Assistant Deputy Ministers manage departmental operations and evaluate technical merit. They assess whether applications meet criteria and make recommendations to Ministers. For programs with directed intake, ADM-level engagement is where project identification actually begins. A technically sound file that aligns with departmental priorities receives favourable evaluation. A technically sound file that arrives cold, through a public portal, waits in queue.

Central Agency Level: The Prime Minister's Office. The PMO coordinates across departments and ensures alignment with Canada's sovereignty and industrial strategy. When the PMO understands that a particular company is essential to critical mineral supply chains, nuclear fuel cycle sovereignty, or Arctic defence capability, that understanding shapes how multiple departments approach the file simultaneously.

Why Timing Matters

The Canada Strong Fund, the DIA Strategic Partner framework, and the Nuclear Energy Strategy are all in formation now. The governance structures, investment criteria, and engagement processes are being designed this year. Companies that are in conversation with NRCan, DIA, and the PMO during this formation phase have the opportunity to shape the criteria these instruments use. Companies that arrive after the frameworks are published are competing within criteria they had no role in setting.

PART ONE: FEDERAL FUNDING PROGRAMS

The federal government has committed unprecedented resources through programs and capital vehicles where Canadian companies in critical minerals, nuclear energy, uranium, SMR technology, and defence industrial sectors are eligible recipients, preferred partners, or strategically targeted applicants. The following programs represent the highest-value opportunities, with a combined contribution target of $3 million to $25 million, plus equity co-investment potential through the sovereign vehicles.

Program	Type	Target Amount	Timeline
Canada Strong Fund	Equity co-investment	$20M+ (large projects)	Deploying 2026
Critical Minerals Sovereign Fund	Equity / debt / offtake	$5M to $50M+	Deploying 2026
GPI (DIS Top-Up, $50M)	Non-repayable	$2.3M to $16.7M	Continuous / Directed
$443M Critical Mineral Processing	Non-repayable	$5M to $25M	Open
DND Microreactor Program	R&D contribution	$1M to $10M	2026 to 2027
RDII ($357.7M)	Non-repayable	$1M to $20M	Open
IDEaS	Repayable (up to 75%)	$150K to $15M	Challenge-based
BDC Defence ($6B)	Lending	$1M to $20M+	Ongoing
IRAP / NGen	Non-repayable	$250K to $10M	Rolling
CMETC (30%)	Tax credit	Variable (exploration)	Annual
SR&ED + Provincial Credits	Tax credit	$100K to $500K/yr	Ongoing
COMBINED TARGET		$3M to $25M + equity	6 to 12 months

Canada Strong Fund

CANADA STRONG FUND: $25 BILLION SOVEREIGN WEALTH FUND

Canada's first national sovereign wealth fund. Announced April 27, 2026 by Prime Minister Carney. Initial federal contribution of $25 billion over three years. Arm's-length Crown corporation with independent board and CEO, reporting through Minister of Finance Champagne. Invests alongside private sector capital in Canadian projects and companies on a fully commercial basis. Priority sectors: clean and conventional energy, critical minerals, agriculture, and infrastructure. Nuclear is explicitly named among the 15 Major Projects Office-referred project categories representing $126 billion in investment.

The Canada Strong Fund is not a grant program. It takes equity positions. That distinction matters: it means projects must be commercially viable, not just strategically important. Companies with advanced projects in energy, critical minerals, or infrastructure that are too large for standard SME instruments but have not yet attracted private equity at scale are the primary target for co-investment.

What Northern Arc Does: Position the company's project with the Canada Strong Fund's transition office and the Minister of Finance's office. Frame the project within the sovereignty mandate and align it with the 15 MPO-referred project categories. The Fund's governance is being finalized now. Engagement during the formation phase creates advantages that persist through deployment.

Target: Variable; no published per-project limit. Designed for portfolio-scale deployment. **Timeline:** 2026 to 2029 initial deployment.

The Fund will also offer a retail investment product, allowing individual Canadians to participate alongside institutional capital in the Fund’s portfolio. For companies currently in conversation with the transition office, this retail dimension strengthens the political case for co-investment: the Fund is designed to be seen as a national ownership story, not simply a government balance sheet instrument.

Critical Minerals Sovereign Fund

A separate $2 billion instrument managed through NRCan for strategic investments in critical mineral projects and companies through equity investments, debt instruments, and offtake contracts. Distinct from the Canada Strong Fund. Designed to secure Canada's critical mineral value chains. Launching 2026.

What Northern Arc Does: Engage with NRCan's Critical Minerals Centre of Excellence and Minister Hodgson's office to position the project within the Fund's deployment priorities before formal intake processes are announced.

Target: $5M to $50M+. **Timeline:** Deploying 2026.

GPI Defence Industrial Strategy Top-Up ($50M)

Budget 2025 allocated a $50 million top-up to NRCan's Global Partnerships Initiative through the Defence Industrial Strategy, targeting joint investments with allied partners in Canadian critical minerals projects with defence and dual-use applications. GPI now operates two intake pathways: open continuous Expression of Interest (launched February 19, 2026, jointly with CMRDD) and directed intake (invitation only) where NRCan identifies projects through proponent engagement and expedites assessment timelines.

Individual GPI awards have ranged from $2.3 million to $16.7 million. The directed intake pathway is where Northern Arc's ministerial engagement adds direct value: projects in conversation with Minister Hodgson's office before intake are identified for directed consideration before the open competition fills the envelope.

Eligibility: critical minerals processing or refining clients with international allied partnerships and pre-commercial technology (TRL below 8).

Target: $2.3M to $16.7M. **Timeline:** Continuous EOI since February 19, 2026. Directed intake ongoing.

$443 Million Critical Mineral Processing Technologies

The Defence Industrial Strategy allocated $443 million over five years through ISED in collaboration with NRCan to develop cutting-edge critical mineral processing technologies, partner with allies on joint investments in Canadian projects, and build a critical mineral stockpiling mechanism. This envelope is separate from the CDIR ($1.4 billion). Companies with processing or refining technology at or near commercial scale are the target profile.

Target: $5M to $25M. **Timeline:** Open.

Nuclear Energy Strategy (NRCan)

Announced April 29, 2026 by Minister Hodgson at CNA2026. A transformative strategy to be released by end of 2026, built on four pillars: enabling new builds (large and small scale) across Canada; establishing Canada as a global supplier and exporter of nuclear technology and fuel; expanding uranium production to meet allied fleet expansion needs; and developing new Canadian nuclear innovations across fission, fusion, SMRs, and microreactors.

Canada produced approximately 24 percent of global uranium output in 2024. Seventeen CANDU reactors generate roughly 13 percent of Canada's electricity. The global nuclear industry is projected to grow by up to $200 billion per year by 2030. The $2.2 billion commitment to Chalk River Laboratories over ten years, including the Advanced Materials Research Centre, provides the anchor for an expanded Canadian nuclear industrial base.

The strategy input window is open now. Companies in the nuclear supply chain, uranium production, fuel cycle, SMR manufacturing, or microreactor development that engage with NRCan during strategy formation are positioned before the strategy sets the intake criteria for downstream funding instruments.

Trigger: Any nuclear, uranium, fuel cycle, SMR, microreactor, or nuclear supply chain company. Also relevant for AI and data centre companies with nuclear-powered compute applications.

DND Microreactor Program ($40 Million)

A $40 million initial investment for 2026 to 2027 to assess the potential of a Canadian-controlled microreactor to provide heat and electricity to remote and northern DND and CAF facilities. Framed explicitly as an Arctic sovereignty requirement. Early investments include $6 million in 2025 to 2026, of which $4.7 million is for R&D at Chalk River Laboratories. Canadian Strategic Missions Corporation received $1.2 million through NGen for microreactor manufacturing cell development.

Target: $1M to $10M. **Timeline:** 2026 to 2027 feasibility assessment phase.

Defence Investment Agency (DIA)

Established October 2025 as part of DND. Standalone legislation expected Spring 2026. Single-point coordination for defence procurement and defence-related mineral sourcing with fast-track approval processes. DIA Strategic Partner framework launching summer 2026. For companies in critical minerals, nuclear, or dual-use technology, BUILD classification under the Build-Partner-Buy framework and DIA Strategic Partner designation are the two highest-value positioning outcomes in the current federal defence landscape.

Budget 2025 committed $81.8 billion in defence spending through 2035, with projected $180 billion in defence procurement, $290 billion in defence-related infrastructure, and $125 billion in downstream economic activity. Companies that engage with DIA before the Strategic Partner framework is formalized have the opportunity to shape the criteria used to identify strategic partners.

Key dates: DIA standalone legislation Spring 2026. Strategic Partner framework summer 2026. Engage now.

RDII, IDEaS, and BDC Defence

Three complementary instruments round out the defence positioning stack. The Regional Defence Investment Initiative (RDII) is a $357.7 million program delivered through Canada's Regional Development Agencies to integrate businesses into domestic and international defence supply chains. Repayable contributions cover up to 75 percent of eligible costs for businesses; Indigenous applicants may access up to 100 percent non-repayable. Innovation for Defence Excellence and Security (IDEaS) provides non-repayable contributions from $150,000 (proof of concept) to $6.75 million (phased development) for companies solving DND-defined capability gaps. BDC's Defence growth stream ($6 billion allocated) provides patient lending for Canadian defence industry companies.

Defence Production Act — Critical Minerals Designation. Canada has designated certain critical minerals as a national security priority under the Defence Production Act, enabling the government to mobilize domestic production, stabilize pricing, and ensure supply to Canadian and allied defence industries, including NATO. For companies producing NATO-designated minerals, this designation provides the national security framing that strengthens positioning across GPI, the DIA, and Canada Strong Fund co-investment applications. It also supports proposed amendments to the Export and Import Permits Act designed to enable response to hostile trade actions affecting critical mineral supply chains.

CMETC and SR&ED Tax Credits

The Critical Mineral Exploration Tax Credit (CMETC) provides a 30 percent tax credit on eligible critical mineral exploration expenditures renounced to flow-through share investors. Uranium qualifies. Claimed through tax return, no application required. Separate from SR&ED and CTM ITC. For companies with active exploration programs, CMETC can represent a material capital advantage in financing the next program.

SR&ED provides a federal 35 percent refundable credit on the first $6 million in qualifying R&D expenditures (Budget 2025 doubled the threshold). Provincial credits stack: Alberta Innovation Employment Grant at 20 percent, Ontario OTC at 8 percent and ORDTC at 3.5 percent. We include SR&ED and CMETC for completeness; they are coordinated with, not the primary vehicle for, federal engagement strategy.

Key Dates and Deadlines

Date	Milestone
Now	GPI DIS directed intake: engage NRCan before envelope fills
Now	Nuclear Energy Strategy input window open
Summer 2026	DIA Strategic Partner framework launch
Spring 2026	DIA standalone legislation
2026	Canada Strong Fund deployment begins
2026	Critical Minerals Sovereign Fund deploying
End of 2026	Nuclear Energy Strategy published
2026 to 2027	DND Microreactor feasibility program
Continuous	GPI open EOI, RDII, IDEaS, BDC Defence

PART TWO: FEDERAL DEPARTMENTS AND POSITIONING

Understanding which federal ministries hold mandates aligned with this sector is essential for strategic positioning. The goal is not just to apply for programs. It is to ensure that when applications arrive at a decision point, decision-makers already understand why your company matters.

Natural Resources Canada (NRCan)

PRIORITY: HIGH | Minister: Hon. Tim Hodgson | Mandate: Nuclear Energy Strategy, GPI, Critical Minerals Sovereign Fund, CMETC, Chalk River

NRCan is the primary federal department for this sector. Minister Hodgson has personally announced the Nuclear Energy Strategy, the GPI DIS top-up, and the DND Microreactor Program. NRCan administers the GPI directed intake, oversees the Critical Minerals Sovereign Fund deployment, and anchors the Canada-wide critical minerals positioning strategy. Any company in nuclear, uranium, critical minerals, or energy processing that is not in conversation with Minister Hodgson's office is not positioned.

What Northern Arc Does: Introduce the company to NRCan's Critical Minerals Centre of Excellence and Minister Hodgson's office. Position the file for GPI directed intake consideration. Ensure NRCan's ADMs understand the company's technology and its alignment with the Nuclear Energy Strategy's four pillars before the strategy is published.

National Defence and the Defence Investment Agency

PRIORITY: HIGH | Minister: Hon. Bill McGuinty | Mandate: DIA, DND Microreactor, BUILD-PARTNER-BUY, RDII, IDEaS

For companies with dual-use technology, Arctic applications, or products relevant to Canadian Forces capability gaps, DND and DIA represent the highest-priority engagement pathway after NRCan. The DIA Strategic Partner framework launches summer 2026. Build classification under the Build-Partner-Buy framework represents preferred status in defence procurement. Companies in the nuclear supply chain, microreactor technology, or critical minerals processing with defence applications should be in DIA conversations now, before the Strategic Partner criteria are set.

What Northern Arc Does: Engage with DIA's leadership and Minister McGuinty's office to position the company for BUILD classification and DIA Strategic Partner consideration. Ensure the file aligns with the Defence Industrial Strategy's critical minerals and nuclear framing.

Innovation, Science and Economic Development Canada (ISED)

PRIORITY: HIGH | Minister: Hon. Melanie Joly | Mandate: IRAP, NGen, $443M processing technologies, ProServices

ISED administers IRAP, NGen, and delivers the $443 million critical mineral processing technologies envelope in collaboration with NRCan. For companies with R&D activities alongside their processing or mining operations, IRAP and NGen provide non-repayable contributions that stack with the NRCan instruments above. For SaaS or technology companies serving the sector, IRAP and NGen are the primary federal vehicles.

Finance Canada and the Canada Strong Fund

PRIORITY: HIGH for large-scale projects | Minister: Hon. Francois-Philippe Champagne | Mandate: Canada Strong Fund

For companies with large-scale projects ($20M or above) in energy, critical minerals, or nuclear infrastructure, the Canada Strong Fund creates a federal co-investment pathway that did not exist before April 2026. The Fund's governance and engagement processes are being established now. Northern Arc's engagement with Minister Champagne's office during this formation period is how client projects are identified as co-investment candidates before formal intake is announced.

Regional Development Agencies

PRIORITY: MEDIUM-HIGH | Each RDA delivers stacking programs that complement the primary instruments above

PrairiesCan (Alberta, Saskatchewan, Manitoba) is the primary RDA for western critical minerals and uranium clients. It delivers the Business Scale-Up and Productivity (BSP) program (repayable, up to $10M for for-profit) and ecosystem streams (non-repayable for sector organizations). For Alberta and Saskatchewan uranium and critical minerals companies, PrairiesCan provides a regional stacking layer on top of the NRCan and DIA instruments.

Department	Priority	Minister	Key Opportunity
NRCan	HIGH	Tim Hodgson	GPI directed intake, Critical Minerals Sovereign Fund, Nuclear Energy Strategy
DND / DIA	HIGH	Bill McGuinty	DIA Strategic Partner, DND Microreactor, BUILD classification
ISED	HIGH	Melanie Joly	IRAP, NGen, $443M processing technologies
Finance Canada	HIGH (large projects)	FP Champagne	Canada Strong Fund equity co-investment
PrairiesCan / RDAs	MEDIUM-HIGH	Various	BSP, ERP, stacking contributions

PART THREE: PROVINCIAL AND ALLIED CONSIDERATIONS

Provincial programs stack with federal instruments and strengthen the overall positioning narrative. NATO and allied country engagement creates additional pathways specific to this sector.

Alberta. Alberta Innovates provides the Innovation Employment Grant (20 percent on qualifying R&D, stacking with federal SR&ED). The province is home to a significant share of Canada's critical minerals activity and is positioning as the hub for hydrogen and SMR deployment. Alberta's Clean Technology and Innovation Strategy creates provincial stacking for companies accessing the GPI or CMETC federally.

Saskatchewan. Saskatchewan produces the majority of Canada's uranium. The province's Critical Minerals Initiative and relationship with Cameco and Orano creates a provincial ecosystem for uranium and nuclear fuel cycle companies. Saskatchewan aligns directly with the Nuclear Energy Strategy's uranium expansion pillar.

Ontario. Ontario is the centre of Canada's nuclear industry. Construction at the new Darlington nuclear power plant began in 2025. The Ontario Research and Development Tax Credit (3.5 percent) stacks with federal SR&ED. Ontario's Investment Attraction Office actively coordinates with ISED and NRCan on large-scale nuclear and critical mineral project attraction.

NATO and Allied Partnerships. Canada's participation in the NATO Critical Minerals High Visibility Project (CRMHVP) and the G7 Critical Minerals Production Alliance creates an international positioning dimension that strengthens domestic federal applications. Companies producing any of the 10 NATO-designated defence-critical minerals that Canada supplies (aluminum, cobalt, copper, gallium, germanium, graphite, nickel, niobium, tungsten, uranium) can reference the NATO framing in GPI, DIA, and Canada Strong Fund positioning.

WHY COMPANIES IN THIS SECTOR ARE POSITIONED TO SUCCEED

The federal policy environment has never been more explicitly aligned with companies in critical minerals, nuclear energy, and defence industrial supply chains. Four factors combine to create an exceptional positioning window.

THE STRATEGIC CASE

Sovereignty framing creates political urgency. Canada's relationship with the United States has changed. Ministers and the PMO are actively looking for Canadian companies that demonstrate sovereign industrial capacity in energy, critical minerals, and defence applications. A company that positions itself as a solution to a sovereignty problem reaches Ministers differently than a company seeking a contribution agreement.

The capital instruments are new and the intake criteria are forming. The Canada Strong Fund, Critical Minerals Sovereign Fund, and DIA Strategic Partner framework all launched or are launching in 2026. Their engagement processes, investment criteria, and partner identification mechanisms are being built right now. Companies in conversation today have influence over those criteria that companies engaging in 2027 will not.

Defence and civilian programs now stack in ways they did not before. The Defence Industrial Strategy created explicit pathways connecting defence procurement, critical mineral sourcing, and clean technology funding. A company that accesses RDII through DND, GPI through NRCan, and IRAP through ISED on the same technology project was not possible two years ago. It is the standard approach today.

Ministers need success stories. The Nuclear Energy Strategy, the Canada Strong Fund, and the DIA Strategic Partner framework will all require visible proof of progress. Ministers will be looking for companies they can announce. Canadian companies with credible technology, commercial traction, and demonstrated readiness to absorb federal investment are exactly the organizations all relevant ministerial offices want to be associated with.

WHAT NORTHERN ARC PUBLIC AFFAIRS BRINGS

Northern Arc exists to align political will with bureaucratic process. We ensure that when federal decisions are made, our clients are the answer that Ministers, Deputy Ministers, and the PMO have already agreed upon.

Hon. Kent Hehr, P.C., LL.B., Principal. Kent served as a Cabinet Minister in the Government of Canada, including as Minister of Veterans Affairs and Associate Minister of National Defence. He sat at the Cabinet table where funding decisions are approved, policy directions are set, and departmental mandates are shaped. He understands how Ministers think, what they respond to, and how to frame an industrial sovereignty argument for political support at the highest levels.

Abed Harb, Managing Partner. Abed served in the Prime Minister's Office and as Director and Senior Advisor to multiple Ministers. He spent eight years navigating federal decision-making at the highest levels. He understands how the PMO coordinates national economic strategy, how ministerial offices evaluate requests, and how to ensure alignment across NRCan, DND, ISED, and Finance Canada simultaneously.

What We Do

- **Ministerial Engagement.** We engage directly with Ministers Hodgson, McGuinty, Joly, and Champagne and their offices to ensure each company is understood as a strategic priority, not an applicant in a queue.
- **DIA Strategic Partner Positioning.** We engage with DIA leadership during the Strategic Partner framework formation to ensure client companies are identified as candidates before the framework is publicly launched.
- **GPI Directed Intake Access.** We engage with NRCan's CMRDD to ensure eligible companies are identified for directed intake consideration before the open competition consumes the GPI DIS envelope.
- **Canada Strong Fund Alignment.** For large-scale projects, we engage with the Fund's transition office and the Minister of Finance to frame projects within the sovereignty mandate and connect with the co-investment process before formal intake is announced.
- **Cross-Departmental Coordination.** We ensure the same strategic narrative reaches NRCan, DND, ISED, and Finance Canada simultaneously, so multiple instruments can be pursued without conflicting applications or timeline collisions.

Engagement Timeline and Deliverables

Months 1 to 2: Foundation and Immediate Positioning. Deliver a tailored Federal Opportunities Briefing identifying every program and capital vehicle applicable to the company. Initiate ministerial contact across NRCan, DND and DIA, and ISED. Engage with GPI directed intake process. Position for IRAP or NGen applications where applicable.

Months 3 to 4: Building Strategic Relationships. Advance from introduction to substantive engagement with ministerial offices. Position for DIA Strategic Partner framework consideration ahead of summer 2026 launch. Engage with Canada Strong Fund transition office for large-scale project clients. Pursue capability briefings or site visits for officials visiting the company's region.

Months 5 to 6: Consolidation and Cross-Department Alignment. Ensure the company's file is understood across all relevant departments. Build PMO-level understanding of the company's strategic sovereignty value. Monitor Nuclear Energy Strategy development and ensure client positioning is reflected in the strategy's downstream instruments.

INVESTMENT AND EXPECTED RETURN

Northern Arc Public Affairs offers a dedicated engagement for companies in the critical minerals, nuclear energy, and defence industrial sectors at $10,000 per month plus applicable taxes. The initial engagement period is six months, providing sufficient time to deliver a tailored Federal Opportunities Briefing, initiate ministerial contact across NRCan, DND, ISED, and Finance Canada, position for GPI directed intake, and begin DIA Strategic Partner conversations ahead of the summer 2026 framework launch.

The agreement includes a 30-day termination clause. After six months, the agreement continues month to month. Sovereign capital vehicles, nuclear strategy instruments, and DIA frameworks all operate over multi-year deployment cycles. Ongoing engagement maintains and leverages the relationships built in the foundational period as capital decisions crystallize.

EXPECTED RETURN

A six-month initial engagement totaling $60,000 targets $3 million to $25 million in non-repayable contributions, tax credits, and lending, plus equity co-investment potential through the Canada Strong Fund and the Critical Minerals Sovereign Fund for qualifying projects. Even at the conservative end of the contribution range, the return on engagement exceeds 50:1.

Beyond direct financial return, federal recognition in this sector provides strategic advantages that compound: DIA Strategic Partner status changes procurement access across $180 billion in projected defence procurement through 2035. Nuclear Energy Strategy alignment opens export pathways through TCS and EDC that Minister Hodgson has explicitly committed Canada to pursuing. Canada Strong Fund co-investment signals commercial viability to private institutional capital in ways that a contribution agreement alone cannot.

CONCLUSION

The federal government deployed more strategic capital for Canadian companies in critical minerals, nuclear energy, and sovereign industrial sectors in the last week of April 2026 than in the preceding several years combined. The Canada Strong Fund ($25 billion), the Nuclear Energy Strategy (four pillars, publishing by year-end), the DND Microreactor Program ($40 million), the GPI Defence Industrial top-up ($50 million), the Critical Minerals Sovereign Fund ($2 billion), and the $443 million in processing technology funding represent a structural repositioning of federal capital that has no modern precedent.

The gap is not eligibility. Canadian companies in nuclear, uranium, critical minerals, and defence industrial supply chains are eligible for multiple instruments simultaneously. The gap is positioning. Organizations that submit EOIs through online portals and wait for RFPs are competing against companies that have already built ministerial awareness, aligned their narrative with sovereignty priorities, and established the political groundwork that converts a technically sound application into a directed intake invitation.

The formation window for the Canada Strong Fund, the DIA Strategic Partner framework, and the Nuclear Energy Strategy is open right now. Northern Arc provides the ministerial and PMO-level positioning that places clients inside these frameworks before they close. The six-month engagement delivers comprehensive positioning across NRCan, DND, ISED, and Finance Canada, with a contribution target of $3 million to $25 million plus equity co-investment potential. The window is now.

Northern Arc Public Affairs looks forward to partnering with your organization to capture the federal opportunities that Canada's sovereignty moment demands.

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