Nuclear Energy Strategy for Canada

New Reactor Builds | Export Leadership | Uranium Supply Chain | SMR & Microreactor Innovation

Prepared by

NORTHERN ARC PUBLIC AFFAIRS

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CONFIDENTIAL

CONTACT

Hon. Kent Hehr, P.C., LL.B., Principal

kent@northernarc.ca | 403-921-2126

Abed Harb, Managing Partner

abed@northernarc.ca | 403-999-9552

> *"This Strategy articulates how Canada will meet that moment: expanding nuclear capacity at home, asserting leadership in global export markets, securing the uranium fuel cycle, and investing in the innovations that will define the next generation of nuclear energy."*
>
> **The Hon. Tim Hodgson, P.C., M.P., Minister of Energy and Natural Resources** Nuclear Energy Strategy for Canada | June 22, 2026

Up to 10	**$2.2B**	**$25B**	**4+**
New Reactors by 2040	Chalk River Investment	Canada Strong Fund	New CANDU Export Markets by 2040

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EXECUTIVE SUMMARY

On June 22, 2026, the federal government released the Nuclear Energy Strategy for Canada. It is the country's first comprehensive nuclear policy in a generation. The strategy commits to more domestic reactor construction, a more aggressive export posture, and deeper public investment in the nuclear value chain than anything Ottawa has announced in decades. It calls for two large-scale reactors under construction by 2035 and up to ten in total by 2040. It targets CANDU technology in at least four new international markets by 2040. It anchors a $2.2 billion investment at Chalk River Laboratories. And it positions Canada explicitly as a nuclear exporter in the global renaissance now underway.

The Canada Growth Fund has already invested $2 billion in the Darlington New Nuclear Project, positioning it to become the first SMR deployment in the G7. The day after the strategy's release, the federal government and Ontario announced $700 million in loan guarantees to give seven Williams Treaties First Nations a minority equity stake in Darlington, establishing the first Indigenous equity partnership in a Canadian nuclear reactor. The federal financing policy for new nuclear power projects is being drafted, with the framework due by April 2027. The capital, the direction, and the political will are now in writing.

The combined federal investment envelope for Canadian companies in nuclear energy, uranium, SMR technology, nuclear supply chain, and microreactor development now represents the most explicitly defined federal commitment to a single industrial sector in a generation. Most companies operating in this sector are watching for RFPs and monitoring program portals. They are not positioned at the ministerial, Deputy Minister, or PMO level where the downstream instruments, financing frameworks, and directed intake processes are actually being shaped.

This briefing maps the federal funding and positioning landscape for Canadian companies in nuclear energy, uranium, SMR technology, microreactor development, and nuclear supply chain. It outlines a strategic roadmap to capture $5 million to $50 million in federal contributions, tax credits, and lending, plus equity co-investment potential through the Canada Strong Fund and Canada Growth Fund for qualifying projects.

WHAT MAKES THIS SECTOR DIFFERENT IN THE FEDERAL LANDSCAPE

The financing framework is being designed right now. The federal government committed in the Nuclear Energy Strategy to publish a draft federal financing policy for new nuclear power projects by April 2027. The investment criteria, co-investment structures, and engagement processes for nuclear infrastructure are being built this year. Companies in conversation with NRCan, Finance Canada, and the Canada Strong Fund during this formation period have influence over those criteria that companies arriving in 2027 will not.

The Williams Treaties equity model creates a template. The first Indigenous equity partnership in a Canadian nuclear reactor was announced June 23, 2026, the day after the strategy's release. It establishes a co-investment structure through the Indigenous Loan Guarantee Program that will be repeated across new build projects in Ontario, Saskatchewan, Alberta, and New Brunswick. Companies that understand this model and can partner within it are positioned ahead of those who treat nuclear procurement as a purely federal relationship.

Defence framing opens a parallel engagement pathway. Uranium is designated as a defence-critical mineral under Canada's Defence Production Act. The DND Microreactor Program frames nuclear explicitly through Arctic sovereignty. The DIA Strategic Partner framework positions nuclear supply chain companies as defence industrial partners, not energy contractors. This framing reaches DND and DIA decision-makers who manage procurement budgets and directed intake processes that are entirely separate from NRCan program streams.

THE COMPETITIVE GAP: WHY URGENCY MATTERS

Comparable Canadian companies are securing $5 million to $25 million through stacked contributions from RDII, IRAP, NGen, and GPI programs alongside SR&ED and CMETC tax credits. The Canada Strong Fund is deploying equity in 2026. The Canada Growth Fund's Darlington investment establishes the co-investment template for subsequent nuclear projects. The DIA Strategic Partner framework launches summer 2026. The Nuclear Energy Strategy's financing policy is due by April 2027. 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 the nuclear 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 nuclear priorities. Minister McGuinty at DND shapes which companies are positioned as defence industrial partners in the nuclear supply chain. Minister Champagne at Finance oversees the Canada Strong Fund's deployment mandate and the nuclear financing framework being drafted for April 2027. Ministerial staff filter what reaches the Minister and shape how issues are framed. When a Minister's office understands that a company represents sovereign nuclear value, that understanding flows through the department and 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 nuclear 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 uranium supply chain sovereignty, nuclear fuel cycle security, or Arctic defence capability, that understanding shapes how NRCan, DND, Finance Canada, and ISED approach the file simultaneously.

Why Timing Matters

The Nuclear Energy Strategy, the federal financing policy for new builds, the DIA Strategic Partner framework, and the Canada Strong Fund 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 Finance Canada 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 nuclear energy, uranium, SMR technology, microreactor development, and nuclear supply chain sectors are eligible recipients, preferred partners, or strategically targeted applicants. The following programs represent the highest-value opportunities, with a combined contribution target of $5 million to $50 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
Canada Growth Fund	Equity / structured finance	$5M to $50M+	Active (Darlington precedent)
Nuclear Energy Strategy instruments	Contributions (various)	$1M to $25M	Forming 2026-2027
Chalk River / AECL ($2.2B)	R&D contribution / lab use	$250K to $5M	2026-2035
DND Microreactor ($40M)	R&D contribution	$1M to $10M	2026-2027
RDII ($379.2M)	Repayable (up to 75%)	$1M to $10M	Open to Dec 2027
IDEaS	Repayable	$150K to $6.75M	Challenge-based
IRAP / NGen	Non-repayable	$250K to $10M	Rolling
BDC Defence Platform ($6B)	Lending / VC	$1M to $20M+	Ongoing
CMETC (30%)	Tax credit	Variable (exploration)	Annual
SR&ED + Provincial Credits	Tax credit	$100K to $500K/yr	Ongoing
COMBINED TARGET		**$5M to $50M + equity**	6 to 12 months

Canada Strong Fund and Canada Growth 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 reporting through Minister of Finance Champagne. Invests alongside private sector capital on a fully commercial basis. Nuclear is explicitly named among the 15 Major Projects Office-referred project categories representing $126 billion in investment. For large-scale nuclear projects that are commercially viable but not yet attracting private equity at scale, the Canada Strong Fund represents a co-investment pathway that did not exist before April 2026.

Canada Growth Fund: $2B Darlington Precedent. The Canada Growth Fund has invested $2 billion in the Darlington New Nuclear Project, establishing the federal government's willingness to deploy equity capital at scale into nuclear infrastructure. This investment, alongside the Williams Treaties First Nations equity partnership announced June 23, 2026, creates a co-investment template that will be applied to subsequent nuclear new-build projects across Saskatchewan, New Brunswick, Alberta, and beyond. Companies that are in conversation during the replication of this model are positioned ahead of those who engage after the structures are set.

Nuclear Energy Strategy (NRCan)

Released June 22, 2026 by Minister Hodgson. The strategy's four pillars, enabling new builds, global export leadership, uranium expansion, and next-generation nuclear innovation, create a policy framework within which every nuclear-adjacent funding instrument will be evaluated. Companies that have shaped their positioning around the four pillars, and that NRCan can identify as embodying the strategy's priorities, receive different treatment than companies applying through program portals with no ministerial engagement history. The draft federal financing policy for new nuclear power projects, due April 2027, will set the investment criteria that the Canada Strong Fund and Canada Growth Fund will apply to nuclear co-investment decisions. Companies in conversation with NRCan during the drafting of that policy have input. Companies that engage after it is published are applying to criteria set without them.

Chalk River Laboratories / AECL ($2.2B)

The federal government has committed $2.2 billion over ten years in capital investments at the Canadian Nuclear Laboratories campus at Chalk River, including a new Advanced Materials Research Centre and critical infrastructure modernization. For companies with R&D programs in nuclear materials, fuel cycle technology, SMR components, or microreactor systems, Chalk River provides the primary federal testing, validation, and partnership infrastructure. NRCan ADM-level engagement is the pathway to a Chalk River collaboration or co-development agreement. Northern Arc positions eligible companies with the NRCan ADMs who manage the Chalk River mandate.

DND Microreactor Program ($40M)

An initial $40 million investment for 2026-2027 to assess the potential of a Canadian-controlled microreactor to provide heat and electricity to remote and northern DND and Canadian Armed Forces facilities. Framed explicitly as an Arctic sovereignty requirement. Early investments include $6 million in 2025-2026, of which $4.7 million went to R&D at Chalk River Laboratories. For companies developing microreactor technology, Arctic energy systems, or remote community power solutions, this program represents the defence entry point into nuclear infrastructure funding that connects to the DIA Strategic Partner framework and RDII.

Regional Defence Investment Initiative (RDII)

$379.2 million delivered through Canada's seven Regional Development Agencies. Interest-free repayable contributions covering up to 75 percent of eligible costs, up to 100 percent non-repayable for Indigenous applicants. Defence nexus required. Intake open to December 31, 2027; projects must complete by March 31, 2028. For companies with dual-use technology in the nuclear supply chain, SMR components, advanced materials, or microreactor systems, RDII provides the regional stacking layer that complements the NRCan instruments above. Confirm dual-use framing with the relevant RDA before applying.

IDEaS and BDC Defence Platform

IDEaS provides non-repayable contributions from $150,000 (proof of concept) to $6.75 million (phased development) for companies solving DND-defined capability gaps. For nuclear-adjacent companies with technology relevant to Arctic power, remote operations, or dual-use materials, IDEaS Challenges provide a defence validation pathway that strengthens the overall federal positioning stack.

BDC Defence Platform ($6B). BDC's defence investment platform includes the $3.5 billion Defence Loans stream, the $500 million StrongNorth Venture Capital fund for defence and dual-use technology companies, and the $500 million Catalyst Innovation stream for defence-adjacent dual-use technologies. Available to companies with Canadian operations. As of May 2026, $91.7 million has been deployed across 16 businesses.

CMETC, SR&ED, and 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. SR&ED provides a federal 35 percent refundable credit on the first $6 million in qualifying R&D expenditures. Provincial credits stack: Alberta Innovation Employment Grant at 20 percent, Ontario OTC at 8 percent, Saskatchewan IEG at 10 percent. These are included for completeness; they are coordinated with, not the primary vehicle for, federal engagement strategy.

Key Dates and Deadlines

Date	Milestone
Now	Nuclear Energy Strategy input: engage NRCan before downstream instruments are locked
Now	GPI DIS directed intake: engage NRCan before open competition fills the envelope
Summer 2026	DIA Strategic Partner framework launch
2026	Canada Strong Fund deployment begins; Canada Growth Fund co-investment

	template active
2026-2027	DND Microreactor feasibility program ($40M)
April 2027	Federal financing policy for new nuclear power projects (draft)
Open to Dec 2027	RDII: intake open, projects complete by March 31, 2028
2027-2040	New reactor construction timeline: 2 under construction by 2035, up to 10 by 2040
4+ markets by 2040	CANDU export targets: TCS and EDC structured engagement
Continuous	IRAP, NGen, IDEaS, BDC Defence Platform

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, Chalk River, Critical Minerals Sovereign Fund, CMETC

NRCan is the primary federal department for this sector. Minister Hodgson has personally released the Nuclear Energy Strategy, announced the DND Microreactor Program, and oversees the GPI directed intake and the Critical Minerals Sovereign Fund deployment. Any company in nuclear, uranium, fuel cycle, SMR manufacturing, or microreactor development that is not in conversation with Minister Hodgson's office is not positioned. The Nuclear Energy Strategy's export ambitions are structured through TCS and EDC with NRCan coordination. The financing framework due April 2027 is being drafted inside NRCan now.

What Northern Arc Does: Engage with NRCan's ADMs managing the Nuclear Energy Strategy, the Chalk River mandate, and the GPI directed intake. Position the company's technology within the strategy's four pillars. Ensure NRCan understands the company's role in Canada's nuclear value chain before downstream instruments are formalized.

National Defence and the Defence Investment Agency (DIA)

PRIORITY: HIGH | Ministers: Hon. David McGuinty (DND), Hon. Bill Fuhr (Defence Procurement) | Mandate: DIA, Microreactor, RDII, IDEaS, BUILD-PARTNER-BUY

For companies with dual-use technology, Arctic microreactor applications, advanced materials, or uranium-adjacent defence supply chain roles, DND and DIA represent the highest-priority parallel engagement after NRCan. The DIA Strategic Partner framework launches summer 2026. BUILD classification under the Build-Partner-Buy framework represents preferred status in defence procurement across $180 billion in projected defence spending through 2035. Companies with nuclear supply chain technology that carries a defence application should be in DIA conversations now, before the Strategic Partner criteria are set.

What Northern Arc Does: Engage with DIA leadership and Minister McGuinty's office to position eligible companies for BUILD classification and DIA Strategic Partner consideration. Align the company's file with the Defence Industrial Strategy's nuclear and dual-use framing.

Innovation, Science and Economic Development Canada (ISED)

PRIORITY: HIGH | Minister: Hon. Mélanie Joly | Mandate: IRAP, NGen, SRF, RAII, ISC

ISED delivers IRAP and NGen for companies with R&D components alongside nuclear or advanced materials work. For technology companies serving the nuclear sector, including data platforms, AI applications for reactor monitoring, grid management software, and advanced manufacturing systems, ISED provides the primary non-repayable contribution stack. The Strategic Response Fund (SRF) is also administered through ISED for large-scale projects meeting the sector and capex thresholds.

Finance Canada and Canada Strong Fund

PRIORITY: HIGH for large-scale projects | Minister: Hon. François-Philippe Champagne | Mandate: Canada Strong Fund, nuclear financing framework

For companies with large-scale nuclear projects ($20 million or above), the Canada Strong Fund creates a federal co-investment pathway that did not exist before April 2026. The draft financing policy for new nuclear power projects, due April 2027, is being developed through Finance Canada. Northern Arc's engagement with Minister Champagne's office during the drafting period is how client projects are identified as co-investment candidates before formal intake is announced.

Indigenous Partnership Channels

The Williams Treaties First Nations equity partnership in the Darlington New Nuclear Project, announced June 23, 2026, establishes the first replicable Indigenous equity model in Canadian nuclear history. The structure uses the Indigenous Loan Guarantee Program for $700 million in loan guarantees converting to equity in the Darlington New Nuclear Project. For companies developing new nuclear assets in provinces with active First Nations economic development mandates, this structure creates both a compliance requirement and a competitive differentiator. Northern Arc engages Indigenous Services Canada and the relevant provincial Indigenous relations offices alongside the federal NRCan and DND engagement tracks.

Federal Engagement Summary

Department	Priority	Minister	Key Opportunity
NRCan	HIGH	Tim Hodgson	Nuclear Energy Strategy positioning, GPI directed intake, Chalk River collaboration, Critical Minerals Sovereign Fund
DND / DIA	HIGH	McGuinty / Fuhr	DIA Strategic Partner framework, DND Microreactor, BUILD classification, RDII
ISED	HIGH	Mélanie Joly	IRAP, NGen, SRF (large projects), ISC procurement
Finance Canada	HIGH (large projects)	F-P Champagne	Canada Strong Fund equity co-investment, nuclear financing policy (April 2027)
Indigenous / ISC	MEDIUM-HIGH	Mandy Gull-Masty	Indigenous equity partnership model, loan guarantees, ISC procurement
RDAs	MEDIUM-HIGH	Various	RDII delivery (PrairiesCan, ACOA, FedDev, PacifiCan)

PART THREE: PROVINCIAL AND ALLIED CONSIDERATIONS

Ontario. Canada's nuclear heartland. The Darlington New Nuclear Project (OPG BWRX-300) is the first G7 SMR. Canada Growth Fund has committed $2 billion. Williams Treaties equity partnership announced June 23, 2026. Construction scheduled to begin this decade. Bruce Power life extension and OPG refurbishments are the largest active nuclear projects in the western world by budget. Ontario investment attraction and NRCan coordinate closely on nuclear supply chain development. The Ontario Research and Development Tax Credit (3.5 percent) stacks with federal SR&ED for nuclear R&D companies.

Saskatchewan. Canada's uranium capital. Saskatchewan produces the majority of Canada's uranium output, home to the Athabasca Basin, Cameco's Cigar Lake, and the McArthur River mine. The province is pursuing both large and small reactor builds. The Nuclear Energy Strategy's uranium expansion pillar is built around Saskatchewan's resource endowment. PrairiesCan delivers the BSP and RDII for Saskatchewan-based nuclear and uranium companies. The Saskatchewan IEG (10 percent refundable R&D credit) stacks with federal SR&ED.

New Brunswick. Home to Point Lepreau, Canada's only CANDU reactor outside Ontario. New Brunswick is exploring expansion at Point Lepreau and is home to ARC Clean Technology's small modular reactor development. ACOA delivers RDII and REGI for New Brunswick-based nuclear companies. The province has a provincial nuclear energy strategy and is actively seeking federal co-investment in its nuclear future.

Alberta. The only province without a nuclear facility but with a federal energy agreement that explicitly commits to collaborating on developing a strategy for a nuclear power plant. Alberta Innovates and PrairiesCan deliver the provincial and federal stacking programs. The province's hydrogen roadmap and industrial electrification targets create a demand-pull for nuclear baseload that the Nuclear Energy Strategy explicitly addresses.

NATO and Allied Partnerships. Canada co-leads the NATO Critical Minerals High Visibility Project (CRMHVP) with uranium as one of the 12 NATO-designated defence-critical minerals. The G7 Critical Minerals Production Alliance's second round (March 2, 2026) unlocked $12.1 billion in critical minerals projects. The Nuclear Energy Strategy's export targets in four new CANDU markets and engagement with six to ten new nuclear-entrant nations over fifteen years are explicitly structured around NATO and allied relationships. Companies that can frame their nuclear work within the allied supply chain narrative reach the PMO and Minister of Foreign Affairs in addition to NRCan and DND.

WHY COMPANIES IN THIS SECTOR ARE POSITIONED TO SUCCEED

The federal policy environment has never been more explicitly aligned with companies in nuclear energy, uranium, SMR technology, and nuclear supply chain. Four factors combine to create an exceptional positioning window.

THE STRATEGIC CASE

A published national nuclear strategy changes the engagement pathway. Every federal department with a mandate touching nuclear energy, from NRCan and DND to Finance Canada and the PMO, now has a written document telling it to prioritize nuclear. A company that arrives at NRCan with a credible nuclear technology and a narrative aligned with the four pillars is walking into a department that has been told to find them. That structural alignment does not exist in most sectors.

The financing framework is being designed now. The draft federal financing policy for new nuclear power projects is due by April 2027. The investment criteria, risk-sharing structures, and co-investment thresholds are being developed inside NRCan and Finance Canada right now. Companies in conversation during this drafting period have influence that companies arriving after publication will not. This is a twelve-month window with a defined close date.

The Williams Treaties equity model will be repeated. The first Indigenous equity partnership in a Canadian nuclear reactor establishes a legal structure, a precedent, and a political template. Every new nuclear project in Saskatchewan, Alberta, and New Brunswick will face the same Indigenous partnership expectation. Companies that understand this structure and can bring an Indigenous partnership strategy to federal engagements are differentiated from companies treating nuclear procurement as a bilateral federal relationship.

Ministers need success stories. The Nuclear Energy Strategy, the Canada Strong Fund co-investment framework, and the DIA Strategic Partner program will all require visible proof of progress. Ministers will be looking for Canadian companies they can announce as evidence that the strategy is working. 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 Calgary Regional 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 energy strategy, how ministerial offices evaluate requests, and how to ensure alignment across NRCan, DND, Finance Canada, and ISED 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 nuclear priority, not an applicant in a queue.
- → **Nuclear Energy Strategy Positioning.** We engage with NRCan's ADMs managing the strategy's implementation to ensure client companies are aligned with the four pillars and identified as strategic partners before downstream instruments are formalized.
- → **DIA Strategic Partner Positioning.** We engage with DIA leadership during the Strategic Partner framework formation to ensure companies with dual-use nuclear technology are identified as candidates before the framework is publicly launched.
- → **Canada Strong Fund and CGF Alignment.** For large-scale projects, we engage with the Canada Strong Fund's transition office, Finance Canada, and the CGF to frame projects within the sovereign mandate and connect with co-investment processes before formal intake is announced.
- → **Indigenous Partnership Structuring.** We engage with ISC and provincial Indigenous relations offices alongside the federal nuclear engagement track to position clients for the Indigenous partnership model established by the Williams Treaties Darlington precedent.
- → **Cross-Departmental Coordination.** We ensure the same strategic narrative reaches NRCan, DND, ISED, Finance Canada, and the PMO 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's specific technology and stage. Initiate ministerial contact across NRCan and DND. Engage with GPI directed intake process where applicable. Position for IRAP or NGen applications where relevant. Align the company's narrative with the Nuclear Energy Strategy's four pillars in preparation for all downstream engagement.

Months 3 to 4: Building Strategic Relationships. Advance from introduction to substantive engagement with ministerial offices and departmental ADMs. Position for DIA Strategic Partner framework consideration ahead of summer 2026 launch. Engage with the Canada Strong Fund transition office and Finance Canada for large-scale project clients. Build the Chalk River and NRCan ADM relationships that govern directed intake consideration. 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 in the nuclear sector. Monitor the federal nuclear financing policy development (due April 2027) and ensure client positioning is reflected in the criteria being set. Coordinate the Indigenous partnership narrative with ISC and provincial engagement.

INVESTMENT AND EXPECTED RETURN

Northern Arc Public Affairs offers a dedicated engagement for companies in the nuclear energy, uranium, SMR technology, microreactor, and nuclear supply chain sectors at $12,000 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 Canada Strong Fund and CGF co-investment conversations alongside the nuclear financing policy development process.

The agreement includes a 30-day termination clause. After six months, the agreement continues month to month. Nuclear new-build projects, financing frameworks, and DIA Strategic Partner classifications 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 totalling $72,000 targets $5 million to $50 million in non-repayable contributions, tax credits, and lending, plus equity co-investment potential through the Canada Strong Fund and Canada Growth Fund for qualifying projects. Even at the conservative end of the contribution range, the return on engagement exceeds 70:1.

Beyond direct financial return, federal recognition in the nuclear sector provides strategic advantages that compound. DIA Strategic Partner status changes procurement standing across $180 billion in projected defence spending through 2035. Nuclear Energy Strategy alignment opens export pathways through TCS and EDC that Minister Hodgson has explicitly committed Canada to pursuing in four or more new international CANDU markets by 2040. Canada Strong Fund and CGF co-investment signals commercial viability to private institutional capital in ways that a contribution agreement alone cannot.

CONCLUSION

The federal government released more strategic nuclear policy in June 2026 than in the preceding two decades combined. The Nuclear Energy Strategy commits Canada to two large-scale reactors under construction by 2035 and up to ten by 2040. The Canada Growth Fund has invested $2 billion in Darlington. The Williams Treaties First Nations equity partnership establishes the co-investment template for every new build project that follows. The federal financing policy due April 2027 will set the investment criteria that the Canada Strong Fund and CGF will apply to nuclear infrastructure for a generation.

The gap is not eligibility. Canadian companies in nuclear energy, uranium, SMR technology, microreactor development, and nuclear supply chain 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 the Nuclear Energy Strategy's four pillars, and established the political groundwork that converts a technically sound application into a priority file.

The formation window for the federal financing policy, the DIA Strategic Partner framework, and the Canada Strong Fund's nuclear co-investment criteria 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 $5 million to $50 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 nuclear sovereignty moment demands.

NORTHERN ARC PUBLIC AFFAIRS

kent@northernarc.ca | 403-921-2126 | abed@northernarc.ca | 403-999-9552

northernarc.ca