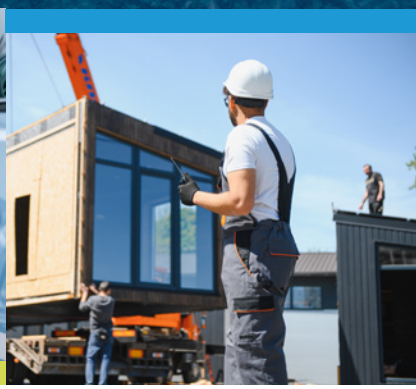
Connecting the Dots

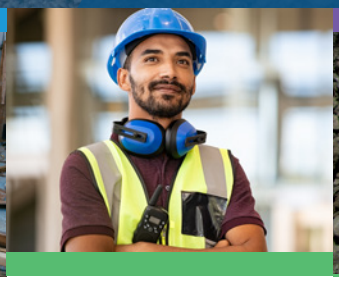
Canada should ensure its **project of national interest** designation is helping build clean, competitive industries—not just individual projects—starting with four focus areas

February 2026



One Canadian Clean Economy
— TASK FORCE —



One Canadian Clean Economy
— TASK FORCE —

Connecting the Dots

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The secretariat of the One Canadian Clean Economy Task Force is Clean Energy Canada, a think tank at Simon Fraser University in Vancouver, British Columbia.

Headquarters are located on the unceded traditional territories of the Musqueam, Squamish, and Tsleil-Waututh peoples. The Task Force recognizes the past, current, and enduring stewardship of the Indigenous Peoples and the critical importance of Indigenous relationship, consultation, partnership, and equity in building one Canadian clean economy.

Additional research and analysis for this report was provided by Dunksy Energy + Climate Advisors.

About the Task Force

The **One Canadian Clean Economy Task Force** brings together leaders from companies and industries that make up Canada's multi-billion dollar clean economy. We represent the critical minerals, battery materials, clean transportation, clean buildings, forest products, clean electricity, and clean technology sectors.

The Task Force was created to advance three key objectives:

1. **Identify key trade barriers and high-potential opportunities** to increase the movement of clean goods and clean economy workers across Canada, facilitate the build-out of clean supply chains, and increase clean investment across Canada.
2. **Elevate the profile of clean economy sectors** and projects in nation-building efforts.
3. **Develop actionable solutions** for federal and provincial governments.

We came together at a moment when Canada needed to reorient its place in the world to help the country unlock the full potential of Canada's clean economy. Combining our decades of expertise and experience, we offer tangible solutions for building one clean Canadian economy. This includes supporting the construction of clean nation-building projects and enabling infrastructure that can unlock greater trade and exports while helping attract needed investments into these high-growth sectors—all in a manner that respects Indigenous rights and identifies concrete opportunities to advance reconciliation.

By leveraging industry-specific expertise and mobilizing behind a set of actionable recommendations, we believe we can help develop new markets and opportunities for Canada's clean economic sectors to grow—even in challenging times.

The task force's message is clear:

If Canada is to build a stronger nation,
a clean economy must be at the centre of it.

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This report and the recommendations within reflect a broad consensus of the task force. However, not every member has formally endorsed each specific recommendation or assertion.

Executive summary

The nature of politics has shifted in Canada under Prime Minister Mark Carney, with a heightened focus on big projects and deal-making over slower regulatory change.

While both methods represent important avenues for Canada to shape its long-term future, we are clearly in a moment of getting things done, putting shovels in the ground, and building up the industrial capacity Canada needs to increase our competitiveness, diversify our trade, and protect Canada's standard of living.

Critically, this domestic build-out is occurring within a rapidly fracturing global order. We are witnessing a stark divide in economic philosophy. China and the European Union are aggressively pivoting to become "electrostates"—economies where competitive advantage is defined by one's control of clean energy supply chains—while the U.S. under Trump appears intent on turning back the clock to a "petrostate" status quo.

So far, Canada is attempting to straddle this widening chasm, balancing clean growth with continued fossil fuel expansion.[1,2] And a key tool the federal government is leveraging to build Canada's economy is fast-tracking projects it deems are in our "national interest" through quicker approvals and re-orienting major government financing mechanisms to prioritize them.

Through one lens, Canada seems to be taking deliberate steps to position itself as a clean energy superpower. The federal government unveiled a Climate Competitiveness Strategy in November 2025.[3] Out of the 11 projects of national interest (PNIs) announced in 2025, eight can be categorized as clean economy projects, with five in critical minerals and three in clean energy and transmission.[4] Only two are in fossil fuels, not including the recent MOU between the federal government and Alberta to potentially build a new oil pipeline. However, a look at the investment value of fossil fuel versus clean projects tells a different story: the two LNG projects alone represent $66 billion of the $116 billion in total investment associated with the first 11 projects.* Furthermore, the proposed North Coast Transmission Line project will in part be enabling further LNG activities, muddying its status as a purely "clean" project.

In this rapidly changing world, true nation building needs to focus on projects and sectors that can best advance Canada's long-term prosperity and security in a quickly electrifying global economy, one which saw US$2.3 trillion in energy transition investments in 2025, up 8% on the previous year.[5] We must focus on strategic opportunities in high-growth clean economic sectors that connect supply and value chains. Building better bridges with new coalitions and allies that—as the prime minister noted in his 2026 World Economic Forum special address—can allow us to succeed as a middle power.

While some of the investments announced to date are significant in terms of dollar value, the bulk of the capital is being attracted to sunsetting industries that won't be part of Canada's long-term future and offer limited benefits to Canada more broadly. **Speed is important, but we also need to ensure that projects are part of a long-term integrated vision for Canada's future security and prosperity, and support the social and economic well-being of Canadians.**[6] Islands of economic activity that generate short-term revenues then quietly lose viability in the global energy transition will not set Canada up for long-term success.

To that end, this report focuses on four specific clean economy sectors: clean electricity transmission, critical minerals, electric vehicles, and lower carbon, modular homebuilding. Each sector presents an opportunity to draw out the greatest possible value from our natural resources, and build dynamic, high-productivity industries with a clear focus on export opportunities, all while making sure Canada is leveraging its domestic market to the greatest possible extent.

This report focuses on four specific clean economy sectors

Clean electricity transmission

Critical mineral refining

Electric vehicle charging

Sustainable modular housing

*Expected value of investment in Ksi Lisims LNG and LNG Canada Phase 2 taken from the official MPO projects list.
Total project list value estimated by McCarthy Tetrault, November 2025.

Projects of national interest

The federal government has taken a multi-pronged approach to projects of national interest by:

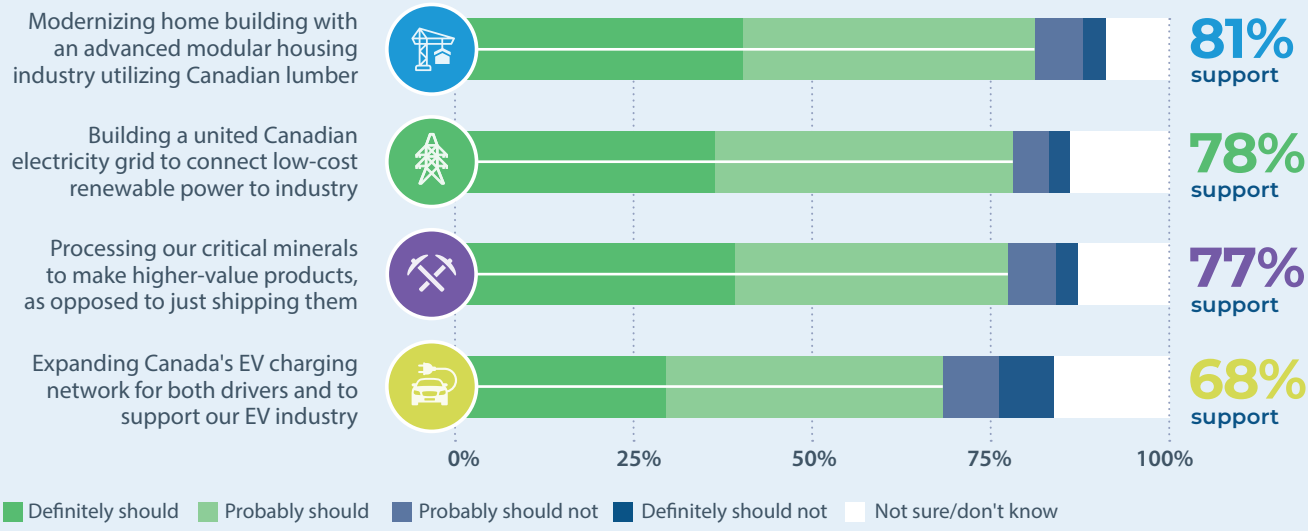
1. **Creating legislative authority through Bill C-5:** enacted in June 2025, the Building Canada Act establishes the legal framework for "national interest" determinations.
2. **Resourcing operational delivery through the Major Projects Office (MPO):** the MPO has moved from a coordinating body to a more active "shepherding" agency under the "One Project, One Review" mandate.
3. **Expanding financing mechanisms:** Budget 2025 enabled financing entities such as Canada Infrastructure Bank to make investments in any nation-building project that has been referred to the MPO, meaning project designation also channels the flow of capital in addition to setting regulatory priorities.
4. **Releasing two lists of projects for referral to date:** this includes a total of 11 projects announced so far, as well as the launch of a public database to track them.[7]
5. **Identifying five "transformative strategies" to advance projects at an earlier stage of development:** this includes high-speed rail from Toronto to Quebec City, Wind West Atlantic Energy, and a Critical Minerals Strategy.[8]
6. **Advancing a Climate Competitiveness Strategy in Budget 2025:** integrating existing policy mechanisms for driving clean growth, including industrial carbon pricing and clean economy investment tax credits.[3]

For each sector showcased in the report, we offer an illustrative case study to ground the opportunity; a potential 'Project of National Interest' that could be realized in Canada today. These vary in their operational readiness, from potential supply-chain hubs encompassing multiple investments to more targeted initiatives.

In all cases there is a role for the federal government to play. Our recommendations focus on the concrete federal actions that can help land projects in these growth-aligned clean sectors, both by addressing project-specific needs and ensuring the connective infrastructure and policies are in place to spur activity and private investment.

If the government's preferred tool to construct Canada's economic future does not prioritize growing competitive, resilient value chains, we may find ourselves looking backward a few years from now, wondering what went wrong and what we should have done differently. Instead, Canada can and should use its PNI designation tool to accelerate the growth of modern industries that will underpin the future of Canada and the global economy. After all, we must take the world as it is and where it's actually going—not as it used it to be.

Canadians overwhelmingly support designating clean economic opportunities as 'projects of national interest'



Research conducted by Abacus Data in January 2026, surveying 2,498 Canadians.

Leveraging our full renewables potential with

Interprovincial transmission

In an era where important trading partners like the EU are implementing carbon border tariffs, domestic industries are increasingly looking to electrify to remain competitive and secure, and households are looking to lower their energy bills through electrification, Canada's electricity grid offers a massive competitive advantage.

By leveraging its clean power, Canada can attract heavy industry and manufacturing that requires low cost, secure, and low-carbon energy to remain viable, effectively turning our grid into a premium industrial asset that drives investment and job growth while helping families find cost-savings in a decarbonizing world.[9,10]

Globally, renewable energy has been soaring in demand, accounting for over 90% of capacity additions in 2024. Here in Canada, renewable energy makes up about two-thirds of total electricity generation, with hydroelectricity making up the bulk of that share.[11] Clean energy generation accounts for 1.5% of Canada's GDP and employs more than 115,000 people.[12]

But the makeup of renewables in Canada's electricity system will look a lot different in the decades to come. **Between now and 2050, wind, solar, and energy storage could account for over 70% of all new electricity capacity nationwide,** representing an investment opportunity of up to $200 billion alongside 350,000 associated full-time equivalent job-years across the next decade.[13]

This growth will largely be driven by a simple economic reality: renewables will often be one of the cheapest ways of generating power in Canada.[14]

But fully unlocking Canada's renewable opportunity requires a greater focus on a key part of the electricity system—transmission and interprovincial interties in particular. Expanding existing interties and building new ones can allow provinces to complement each other's respective strengths. Provinces with high-quality renewables could help supply low-cost electricity to surrounding provinces, and in turn benefit from more dispatchable and flexible resources, such as hydroelectric power.[15] Strategically planned interprovincial transmission also reduces risk for all provinces and electricity users, mitigating issues that come from relying on energy imports and hedging against system disruptions from weather events in one or more areas of the country.[16] However, building new interprovincial transmission requires a shift in planning, moving away from a siloed approach in each jurisdiction and toward the creation of new forums that facilitate greater interregional planning.

Failing to build out interprovincial transmission also comes with real costs, as provinces would need to build additional rapid-response capacity. It is estimated that 27% more interprovincial transmission capacity is needed to minimize the costs associated with the electricity system buildout.[17] As countries continue to increase the deployment of renewables around the world, **investments in the grid are growing rapidly, jumping 17% between 2024 and 2025, with global investment reaching $483 billion.**[5]

Unlocking interregional planning by understanding shared benefit

Interregional planning will require multiple levels of government, respective provincial system operators, and energy system stakeholders to work together. At the heart of this will be a shared understanding of the different benefits that building interprovincial transmission will offer those involved, informing a common approach to allocating costs in relation to these benefits. The table below presents some of the barriers preventing this from moving forward today.

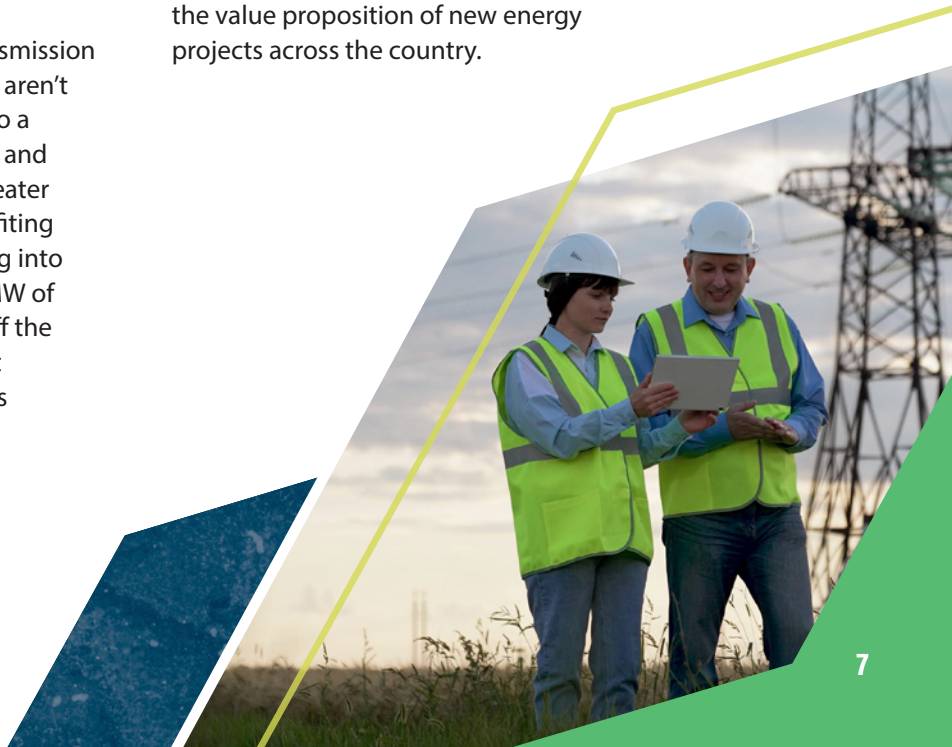
Challenges to building a framework for benefit sharing in interprovincial transmission

BENEFIT CATEGORIZATION	BENEFIT ALLOCATION
Barriers:	**Barriers:**
The benefits of building transmission vary from province to province, with different approaches for evaluating the value to ratepayers, benefits to large generation projects seeking grid access or major electricity consumers, and any broader societal or policy outcomes.	Due to a lack of a common cost allocation methodology, bilateral negotiations occur between relevant entities on a project-by-project basis. Cost allocations are also impacted by perceived benefit, which creates friction if there is not a shared framework for evaluation.
No framework exists in Canada that creates a shared understanding or commonly agreed upon methodology for systematically evaluating the benefits of transmission projects	Provinces or Crown corporations currently oversee their own transmission and distribution planning, with a lack of higher-level regional planning or evaluation of wider regional benefits that could be achieved.

Source: Information in this table adapted from Interregional Transmission Benefit Accrual Study, Energy + Environmental Economics, 2022.

There are opportunities for improving these connections between provinces in every part of the country. From expanding connections between B.C. and its neighbours the Yukon and Alberta to sharing the comparative advantages between Saskatchewan and Manitoba, to better connecting Atlantic provinces with each other and to the growing demand centers in Ontario and Quebec. Interprovincial transmission is made even more achievable today by recent technological advances delivering efficient transmission over thousands of kilometres.[16,15] And provinces aren't waiting: Manitoba and Ontario have signed onto a provincially-led MOU to advance clean, reliable, and affordable electricity across Canada through greater transmission interties.[18] Ontario is already benefiting from interprovincial system integration, entering into a renewed 10-year agreement in 2023 for 600 MW of annual capacity swapping with Quebec, built off the success of the prior 2017-2023 trade agreement which was estimated to save Ontario rate payers $38 million.[19,20]

In order to accelerate the pace of deployment, the federal government must act as an intermediary and accelerator to remove barriers and de-risk interprovincial transmission projects through the provision of additional funding and other support. Building transmission is a nation-building effort, connecting provinces and setting Canada up for long-term energy security, while also increasing the value proposition of new energy projects across the country.



SPOTLIGHT PROJECT

Connecting Wind West to centres of clean electricity demand

Wind West, a massive offshore wind initiative located off the coast of Nova Scotia, represents at least 62 GW of identified offshore wind sites—enough to meet a quarter of Canada's total current electricity capacity if fully built out.[21]

Wind West has been placed on a secondary list of transformative strategies being referred to the MPO rather than being designated as a project of national interest.[22] The first steps have already been taken to accelerate the licensing and construction of offshore wind projects under this strategy.[8]

While the MPO has recognized that a wider Eastern Energy Partnership around the Wind West project could include transmission interties, transmission has not been prioritized or moved forward with the same pace as the offshore wind components of Wind West itself.[8]

In addition to facilitating financing and streamlining regulatory approvals, there is a role for the MPO to act as a coordinating body and deliver the specific toolkit that transmission projects require to ensure equitable benefits to all stakeholders and ratepayers.

A new interprovincial, high-voltage, direct-current transmission line connects Wind West to manufacturing hubs in Ontario and Quebec represents a major nation-building opportunity, unlocking a new supply of clean, cost-effective, reliable electricity and offering economic benefits to all regions.

Why this project should be prioritized

- **Likelihood of success:** The electricity generated by any ambitious offshore wind scenario will vastly outstrip Nova Scotian demand. The offshore wind potential of Wind West will only be fully realized if a transmission line is constructed to deliver the electricity to larger demand sources to the south (e.g. New England or New York) or west (e.g. Quebec or Ontario) at low enough costs to be competitive with clean energy alternatives within those regions.[23] The Nova Scotia government is an active proponent for the project, and is already working to advance transmission to unlock this opportunity.
- **Economic benefits:** Investing in a transmission line is the only way to realize the energy bill saving potential of Wind West. Preliminary modelling of a 2 GW line showed a reduction in electricity prices across Atlantic Canada of at least $10 per MWh with Wind West plus this transmission compared to not unlocking the Wind West opportunity. A new transmission line could be completed as early as 2031 and could add at least $3.6 billion (2015 CAD) to cumulative GDP from 2031 to 2050.[24]
- **Security:** A transmission line to Quebec—and potentially Ontario—could connect Atlantic Canada offshore wind power generation to significant demand from industrial and manufacturing sites in Central Canada, securing a clean manufacturing advantage for low-carbon aluminum, batteries, and critical minerals production. It would also anchor Canada's energy security, ensuring clean power generation first and foremost serves Canadians, instead of being exported to the U.S.
- **Opportunities to advance Indigenous interests:** The project would offer significant potential for Indigenous economic participation and equity ownership with First Nations such as the Mi'kmaq.[21]
- **Supports climate goals:** Wind West and the Eastern Energy Partnership represent a vital opportunity to unlock a major new source of reliable, clean electricity that, with new interprovincial transmission, could electrify and reduce emissions in major manufacturing hubs across Quebec and Ontario.

Federal actions to unlock interprovincial transmission PNIs

1. **Establish a framework for coordinating the federal government's role and incentives to support interprovincial transmission.** This would help ensure transmission projects—like the ones that would connect Wind West—are prioritized in PNI designations and energy corridor planning across the country. The framework should, as a priority, facilitate the balancing of interests across jurisdictions. The federal government could also help explore different funding models that leverage both public and private capital, and support equity partnerships with Indigenous nations.
2. **Provide additional financial support for interprovincial transmission** to de-risk projects, accelerate the pace of construction, and help reduce costs for ratepayers, including by leveraging new and existing Clean Economy Investment Tax Credits and dedicated financing through the Canada Infrastructure Bank and Canada Growth Fund.
3. **Offer financial support to incentivize interregional electricity transmission planning between provinces.** Unlocking investments in Wind West through the construction of a new interprovincial transmission line will require significant planning between provinces. This includes securing offtake agreements for where new electricity generation will go, as well as coordinating construction and balancing the costs of integrating the new power supply into different electricity grids through common cost allocation and benefit accrual methodologies. The federal government can help catalyze interregional planning by making federal funding contingent on the delivery of agreed upon interregional plans.

Adding more value to our

Critical minerals

Governments across Canada have rightly recognized the huge economic and strategic value that Canada's critical minerals represent. As a country, we are one of the best placed in the world, with reserves that rank in the top 10 globally for the most in-demand metals and minerals.[25]

According to the International Energy Agency's latest outlook, global demand for the minerals essential to decarbonization will triple by 2040, with specific markets like lithium projected to grow fivefold.[26] Investments in the battery metals supply chain reached $127 billion globally in 2025, and are expected to continue growing in the coming years, reaching $146 billion in 2028.[5] As trading partners such as the EU advance regulations that favour batteries with a lower-carbon footprint and made with responsibly-produced critical minerals, Canada can also lean into its clean credentials, giving Canadian products a distinct competitive edge in global markets.[27]

But despite Canada's high rank on raw mineral resources, we have built relatively little refining and processing capacity domestically and are projected to account for a negligible amount of global refined material production capacity even by 2040.[26] While Canada's role as a secure global supplier of raw minerals is undeniable, stopping at the extraction stage leaves the vast majority of critical minerals' economic value to other countries. We must ensure we avoid a "dig it and ship it" mindset.

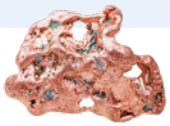
In the critical minerals supply chain, the midstream refers to the processing and refining stages that bridge the gap between raw resource extraction and cell manufacturing. Key midstream products include battery-grade salts, precursor materials, and component materials like cathode active materials (CAMs) and anode powders.

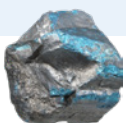
The government of Canada has put significant funds in place for critical mineral projects, including $2 billion over five years to create the Critical Minerals Sovereign Fund and $1.5 billion for the First and Last Mile Fund, which explicitly focuses on upstream and midstream segments of value chains.[29,30] However, as we look to rapidly get projects built, a proactive prioritization of the midstream is required to ensure Canada does not miss a window of opportunity.

Building out our midstream processing capacity can set up Canada as a preferred supplier among like-minded nations looking for a more diverse set of value-added products, building on our critical mineral reserves. Done strategically, we can also build out the hubs of refining and processing that provide employment pathways for conventional energy workers, ensuring all Canadians benefit from the energy transition.

Canadian reserves of key critical minerals[28]

	Lithium	Copper	Nickel	Graphite	Cobalt
Total value of Canadian reserves (estimate)	$120 billion	$103 billion	$51 billion	$10 billion	$8 billion
Percent of reserves produced in 2024	0.6%	6.2%	5.7%	<0.02%	2.6%

TOTAL: $292 billion

Source: Figure 1: Canadian reserves and production volumes of five critical minerals, *Critical Path: Securing Canada's Place in the Global Critical Minerals Race,* Canadian Climate Institute, 2025.

SPOTLIGHT PROJECT

Battery materials refining in the Central Alberta Corridor

Western Canada is home to several potential battery supply chain regional clusters. That is, areas with the right ingredients for new development: a concentration of critical mineral reserves and innovative clean technologies, heavy industry infrastructure, and human capital. One of these clusters, noted by the Battery Metals Association of Canada, is a potential midstream processing hub located in the **Central Alberta corridor**.[31]

This potential hub also has access to a raw resource not available across Canada: byproducts from the existing oil and gas sector that can produce lithium, vanadium, and synthetic graphite utilizing circularity and net-zero technologies.[31] Oilfield brine is rich with lithium, which can be extracted at notably lower cost than hard rock mining with a significantly reduced environmental footprint.[32,*]

Combined with the existing human resources and expertise present within the chemicals industry, the region also has great potential for manufacturing high-value Precursor Cathode Active Materials (pCAMs), CAMs, and battery anodes due to its proximity to existing nickel and cobalt refining (as well as future lithium production).[31]

Building out these hubs will take a coordinated approach between government and the private sector. The federal government should designate the Central Alberta Corridor a PNI for midstream critical mineral processing, proactively identifying entrants into the sector and supporting them to set up in the region, while also ensuring there is adequate funding to build out the necessary clean energy and transportation infrastructure.

* There are already reserves representing substantial supply in existing and abandoned oil and gas infrastructure, and should this supply prove insufficient in the future, brine aquifers such as the Leduc Formation can be accessed discreetly, without the use of oil and gas infrastructure.[31,33] Together, this means the lithium industry based on these technologies would not require further expansion of the oil and gas industry.

Why this project should be prioritized

- **Likelihood of success:** Key companies are already active in this region and poised for growth. E3 Lithium is successfully operating a field pilot plant and proving that battery-grade lithium can be extracted from Alberta's oilfield brines and aquifers. And Litus Inc is anchoring global intellectual property in Calgary, scaling its direct lithium extraction technology.[34,35] Organizations including the Future Materials Alliance are bringing together companies and Indigenous stakeholders to accelerate economic growth in the midstream.[36] The federal government can build on this progress to-date.
- **Economic benefits:** Focusing on building out our midstream capacity represents a significant return on investment compared to mining for critical minerals alone. Beyond mining and before final battery cell manufacturing sits the single most valuable step in battery manufacturing: the production of pCAMs and CAMs, accounting for roughly 40% of the total cost of a battery cell.[37] Indeed, were Canada to fully build out its EV supply chain, it would create 64,400 jobs and $11.3 billion in GDP from midstream battery material production, far more than the 21,200 jobs and $4.5 billion in GDP that would be generated in the extraction of raw minerals, based on modelling by Clean Energy Canada and the Trillium Network for Advanced Manufacturing in 2022.[38]
- **Security:** Building out our midstream processing capacity is our best opportunity to ensure the security of critical mineral supply chains in Canada and diversify refining capacity globally. As of 2025, China controls approximately 70% of global lithium refining capacity, nearly 80% of cobalt refining, and over 90% of refining capacity for rare earths and graphite.[39] It also offers Canada an opportunity to reduce economic dependence on the U.S. Only 41% of Canada's critical mineral exports went to the U.S. as of 2021, compared to 97% of crude oil exports that same year.[28]
- **Opportunities to advance Indigenous interests:** Several existing companies in the region have economic partnerships with Indigenous nations. This includes Fortune Minerals, which is looking to refine minerals from the Northwest Territories to produce battery-grade cobalt sulphate, bismuth, and copper in partnership with the Tłı̨chǫ Government.[40, 34,35,41]
- **Supports climate goals:** Developing our midstream supply chain for critical minerals in Canada feeds into a myriad of clean technologies that reduce emissions across the economy, from electric vehicles to battery electric storage systems.

Federal actions to unlock a midstream critical minerals PNI

1. **Explicitly include the development of Canada's midstream value chains in the Major Project Office's Critical Minerals Strategy** to ensure the MPO prioritizes getting projects to final investment decisions that are aligned with climate goals. The federal government should also work with provinces collaborating to develop the recently announced Western Canadian Critical Minerals Strategy to ensure alignment and complementarity of efforts.[42]
2. **Publish a broad request for information from potential project proponents and support ecosystem mapping to understand the scale and breadth of midstream opportunities in strategic regions.** This should include requests for information for targeted anchor industries, like the Western Canada copper processing RFI that was launched by the federal government in December 2025. But the federal government should also go further, working with regional industry representatives and provinces to comprehensively map ecosystems to inform future industrial policy and funding programs.[43]
3. **Add a Minerals and Materials Rail and Road Initiative to the PNI Transformative Strategies.** Target funding and resources to build out the infrastructure that will allow resources and products to move freely through regional value chains, and refined products and battery materials to be transported across Canada and internationally. Focus on the specific needs of clean heavy industry sectors, working with provinces and regions to unlock logistical and transportation constraints. This should leverage existing financing including the Trade Diversification Corridors Fund.[44]

Expanding Canada's

EV charging network

The EV transition is in full swing across the world. Global EV sales reached 22 million in 2025, a 25% jump over 2024.[45] By 2030, it is expected that EVs will make up over 57% of sales in Europe, over 20% in the U.S., and more than 80% in China.[46] Spending on EVs and charging infrastructure reached $893 billion globally in 2025, up 21% from the previous year.[5]

Canada stands to benefit immensely from this shift, both at a consumer level and an economic one. A 2025 Electric Mobility Canada report estimates that at least 130,000 Canadians already work in the EV industry, and by 2035, the sector is expected to employ between 360,000 and 600,000 people in a low-to-medium EV uptake scenario.[47] That same report pegs the GDP contribution of the sector to sit between $46 billion and $153 billion annually across the supply chain.

These figures represent the full value chain of EV manufacturing and the development and maintenance of the infrastructure for an electrified auto sector. This means mineral mining, battery material manufacturing and final vehicle assembly, but also the installation and powering of a national charging network alongside end-of-life activities like product recycling and disposal.[48]

But to fully realize Canada's potential, we must ensure that a robust domestic market for EVs continues to grow, making Canadians a valuable customer base when automakers make siting decisions for assembly plants, in turn anchoring other industries in the supply chain—like the midstream critical mineral opportunities mentioned in the previous section or companies offering charging solutions.

One of the most effective ways to grow a robust market for EVs and their input components and parts here in Canada is to ensure access to a reliable, comprehensive public charging network. An expanded network would stretch across the country, creating new jobs and offering benefits to diverse communities from coast to coast to coast, helping more Canadians benefit from the money-saving opportunities EVs provide.[49,50,51]

In January 2026, the federal government released a new auto strategy with the explicit goal of positioning Canada to become a global leader in EV production, leveraging a suite of policies including new proposed tailpipe emission standards, a five year rebate program and $1.5 billion in financing toward EV charging and hydrogen refuelling infrastructure.[52] This financing will play a crucial role in accelerating the rollout of Canada's charging network, but with the right strategic approach, even more could be achieved.

SPOTLIGHT PROJECT

A national EV charging network

The federal government should designate a national EV charging network as a PNI and work with a consortium of proponents to install 30,000 public fast chargepoints across Canada by 2035. Fast chargers serve far more drivers on the go per hour, but their deployment is hindered by higher upfront asset costs plus barriers related to municipal approvals and utility connections.[53,54] At an estimated $125,000 per fast charger, the total infrastructure investment for 30,000 chargepoints would be $3.75 billion. While the federal auto strategy provides new financing for charging infrastructure and a plan to reinstate a clear market signal through regulations, a more comprehensive and coordinated approach is needed to ensure Canada secures the necessary capital for the next wave of critical charging investments.

A PNI designation would galvanize diverse stakeholders already supportive of getting more chargers built across the country, including the EV industry (automakers, charging providers, Canadian Charging Infrastructure Council), utilities (BC Hydro, Hydro-Québec), local and provincial governments, Indigenous nations, and private investors.[55-59] The right level of government support can leverage major private capital, ensuring efficient use of public funds.

Why this project should be prioritized

- **Likelihood of success:** EV charging stations are a commercially available technology, and Canada's charging networks have hundreds of millions of dollars' worth of stations sited, planned, and ready to deploy over the coming years. These networks also have substantial experience deploying stations across Canada, from Victoria, to St. John's, to Whitehorse.
- **Economic benefits:** Charging installation and operation already contribute to the 130,000 jobs in the EV sector today.[47] These are local Canadian civil and electrical contractors and other skilled trades that operate across the country and cannot be easily relocated. There are also several homegrown Canadian charging providers such as FLO and SWTCH—as well as subsidiaries of Canadian electric utility companies (e.g. Ivy Network, BC Hydro, Hydro Quebec/Circuit Electrique)—that could benefit from this initiative. Growing Canada's charging network helps to maintain domestic EV demand and ensure a robust market for the vehicles, batteries, critical minerals, and other components Canada will be producing. On the consumer side, driving an EV saves a typical Canadian driver thousands of dollars per year on fuel costs compared to a gas car driver.[60]
- **Security:** Supporting more Canadians to get behind the wheel of an EV by building out a national charging network allows drivers to plug into clean Canadian electricity versus relying on often imported and unpredictably priced oil and gas.
- **Opportunities to advance Indigenous interests:** Multiple Indigenous organizations, such as Indigenous Clean Energy, have considered or are actively deploying EV charging, and there is an opportunity to expand this participation with federal support.
- **Supports climate goals:** Transportation is the second-highest emitting sector in Canada. EVs produce no tailpipe pollution and are one of the most effective solutions available for reducing carbon emissions in the light-duty vehicle sector today.

Federal actions to unlock a national charging network PNI

1. **Move forward with a Clean Technology Investment Tax Credit for on-road charging infrastructure and re-capitalize the Zero-Emission Infrastructure Program** to complement the $1.5 billion in new financing for charging via the Canada Infrastructure Bank. These measures will further strengthen project economics, including in more under-served areas, and the ITC in particular will provide the predictability needed to facilitate long-term investments.
2. **Better streamline charging approval, connection processes, and timelines** by working with provinces, municipalities and electric utilities.
3. **Ensure the forthcoming tailpipe emission standards are designed with the necessary stringency and implemented rapidly.** Standards should track the stringency of similar EU standards, rather than the U.S., and they should be implemented by 2027 to provide certainty to industry and investors.

Modernizing the way we

Build housing

Housing remains a dominant pressure point for Canadians, and a priority for federal and provincial governments. Through the creation of Build Canada Homes, the federal government is looking to get more homes not just built, but built more efficiently.[61]

To that end, the federal government has made major commitments on modular housing, backed with a promise to provide $25 billion in debt financing and $1 billion in equity financing to "innovative Canadian prefabricated home builders."[62]

Modular housing (also recognized as off-site construction or factory-built housing) is already a meaningful part of the construction industry in Canada, currently valued at $5.1 billion, or 7.5% of the overall Canadian market.[63] However, this remains a small percentage of a market that is currently not at a scale necessary to meet our housing demand. In 2025, Canada saw 259,000 housing starts, up 5.6% from 2024, but still far below the 480,000 we need to build each year over the next decade to restore affordability.[64]

The appeal of modular construction is clear, with the ability to achieve completion rates 25% to 50% faster than conventional approaches and the potential to reduce waste by as much as 46%.[65] Using modular construction practices can also reduce costs between 10% to 25% compared to traditional construction as a result of reduced material use and site overheads.[66] Further to this, the operational cost of these homes can be less than traditional construction due to improved air sealing and overall quality control in the installation of insulation and other energy-saving technologies.[67]

With the right investments and focus on ensuring homes are built to deliver the highest possible operational and embodied carbon performance, modular homebuilding could be a key part of Canada's growing clean economy.[70] The potential emissions savings of modular construction are substantial. Broader industry analysis has shown an average carbon reduction of 22% compared to standard construction, but the potential is even greater.[65] Studies in Canada have found 43% reductions in overall emissions when using modular housing techniques, and researchers in the U.K. have shown whole lifecycle embodied carbon reductions of 45% already being achieved in mid-rise modular housing projects.[71,72]

Scaling factory-built housing with consistent requirements around carbon intensity could also bolster our clean construction materials sector, helping address today's lack of large-scale offtakes which is, a barrier currently limiting growth.[73]

In its most recent January 2026 update, Build Canada Homes announced it has a request for qualification ongoing to build 4,000 housing units with fast-track construction prioritizing modular and factory-built homes.[74] While the pace of action is welcome and necessary, it highlights a risk we face: creating a short-term bottleneck in modular housing supply. In its most recent annual report surveying modular housing producers across Canada, the Modular Building Institute highlighted this capacity gap—resulting from an unexpected surge in demand in 2026 and beyond—as a major concern.[63,74,63]

Addressing this potential bottleneck and supercharging modular construction in Canada (and the associated clean material supply chains) not only creates domestic opportunities, but export growth as well. The global low-carbon construction material market is expected to be worth US$579 billion in 2032 and the modular systems market is predicted to hit US$23 billion in 2030.[75,76]

With nearly 40% of Canadians identifying housing as top concern in their communities, getting housing built is undeniably a matter of national interest.[77] With modular housing, we can do so in a way that helps provide security to our resource sectors, and builds a future-proofed, clean industry benefiting Canadians across the country.[76]

Energy efficiency, the tide that lifts all boats

Modular construction's potential to standardize high energy efficiency doesn't just benefit homeowners, it also has an impact on our wider energy system. Every megawatt saved through efficiency, avoids the need to build expensive new peaker plants or transmission upgrades. Saving a kWh of electricity costs around 3 cents, far cheaper than electricity generation.[68] According to the Ontario government's modeling, **a recent $10.9 billion investment in efficiency programs in the province is projected to avoid $23 billion in system costs**—and these are savings enjoyed by all ratepayers, not just efficiency program participants.[69]

SPOTLIGHT PROJECT

Modular housing hubs in Ontario and B.C.

Canada will need to expand its factory housing footprint across the country if we are to achieve the program goals of Build Canada Homes and the federal government's ambitions for modular housing. Facilities for constructing modular homes and components in the value chain will need to be built in proximity to both the supply of necessary construction materials and close to housing demand. Wood is at the centre of these materials, with one study noting 78% of modular housing providers cite wood as their most used construction material.[78] With substantial forest product sectors and some of the highest levels of housing demand in the country, B.C. and Ontario represent two such provinces where modular housing hubs would be particularly strategic.

The North Bay region of Northern Ontario is already a hub of heavy industry, forestry, and the production of a diverse range of value-added wood products.[79] Expanding the capacity of its existing industries and attracting additional modular housing companies could create a manufacturing hub able to produce high-quality housing close to the demand-driven housing markets of southern Ontario. North Bay is also well located to bring in other key building materials like aluminum from Quebec and steel and precast concrete from other parts of Ontario, which are also often lower carbon than imported materials.

Furthermore, the province is home to established modular leaders like Element5 in St. Thomas, whose mass timber facility converts Ontario forest products into prefabricated structural components.[80] Ontario also hosts numerous companies leading the way in the panelization market (where walls, floors, and roof systems are precision-built in a factory and shipped flat, integrating the full range of construction materials), including Great Gulf's H+ME Technology in Etobicoke.[80] The provincial government in Ontario is also backing modular housing, and a modular hub in the region would directly operationalize Ontario's 2025 Advanced Wood Construction Action Plan.[81]

In B.C. the provincial Ministry of Forests and Mayor of Prince George are advocating for the city to re-orient its forestry industry toward the construction of modular housing.[82] The city is home to one company producing modular homes using panelization, and prefabricated components including trusses, beams, columns, and floor systems.[83]

B.C. is also laying the groundwork to increase international trade of modular housing products and Canadian innovation. The government of British Columbia signed an MoU with the People's Republic of China in January 2026, committing to cooperate on modern wood construction, complementing a federal agreement to jointly promote trade in green products.[84]

Why this project should be prioritized

- **Likelihood of success:** The provincial governments of Ontario and B.C. are committed to developing modular, factory-built housing in their provinces, and the federal government has made substantial financial commitments to support the sector.[85,86] The industry is in a healthy state and expected to see substantial growth in the coming years (a 5.2% compound annual growth rate between now and 2029).[63]
- **Economic benefits:** The projected spend on modular construction between 2025 and 2029 is currently forecast to be approximately $29 billion. With the right government support, this figure could be notably higher. And, of course, expanding access to high-quality affordable housing has a multitude of wider economic benefits, from increasing disposable income for renters and homeowners to improving healthcare impacts with clean, warm homes.[87]
- **Security:** Investing in and expanding domestic offtake of construction materials provides some economic security to Canada in the face of tariffs. The Canadian softwood lumber industry is currently facing renewed headwinds, with the U.S. Department of Commerce raising duty rates to approximately 14.5% as of August 2025.[88] Since nearly 90% of Canada's softwood lumber exports go to the U.S., communities centred around the forest sector are dangerously exposed to American protectionism.[88] Our steel and aluminum industries are facing some even steeper tariffs, currently 50% on both primary metal and derived products.[89]
- **Opportunities to advance Indigenous interests:** Indigenous nations have already made significant investments in the forestry industry, with Indigenous-affiliated forest product companies shipping $500 million in goods and services in 2022.[90] Companies like Bison Modular are also leading the way in constructing factory-built homes designed to benefit First Nations and Indigenous nations.[91] The potential for modular housing to be built rapidly and at lower costs can mean an outsized benefit to Indigenous nations that have some of the strongest demand for affordable housing.[92]
- **Supports climate goals:** Modular construction methods could reduce emissions between 4% and 20% compared to stick-built construction (before factoring in additional savings offered by material choices).[93] Key factors impacting emissions saving potential include the structural framing material used, the distance from factory to housing site, module size, and the delivery method.

Federal actions to unlock a modular housing PNI

1. **Continue to use Build Canada Homes to create demand for modular housing and increase its impact** by working to pre-approve suppliers and explore developing pre-purchase agreements or volume commitments to create demand certainty that can get modular housing factories to a final investment decision. Build Canada Homes should also explore ways to implement the federal government's Standard on Embodied Carbon in Construction in future procurements, requiring modular homes to deliver a 30% reduction in embodied carbon below the market average for the asset type.[73,94]
2. **Designate the build-out of modular housing supply as a transformative strategy,** ensuring it is a priority of the MPO to get more modular housing factories to final investment decisions, aligned with goals on sustainability and climate. The MPO should commission regional, public-facing value chain assessments for the modular housing opportunity across Canada, working with provinces and relevant industry associations to map out potential clusters.
3. **Continue to move codes and standards forward in the short and longer term.** In the short term, federal and provincial governments should support and incentivize the adoption of CSA A277 certification as a requirement for modular housing across Canada. In the longer term, provincial and federal governments should work through the Canadian Board for Harmonized Construction Codes to better integrate modular housing and factory construction methods into the 2030 national model codes.

Conclusion

In a rapidly changing world, it's important to have a federal government focused on getting deals signed and projects built. But to ensure Canada lands on the right side of a fracturing global order and maximizes its strategic advantage as a clean energy superpower, the 'Project of National Interest' designation must be focused on unlocking investments in priority clean economic sectors.

By leveraging this process to address the specific opportunities in key sectors, the government can strategically unlock solutions to multiple problems at once: securing a continental competitive edge through integrated infrastructure like interprovincial transmission, capturing more value and building energy sovereignty by expanding midstream critical mineral processing, guaranteeing the future of our manufacturing base by establishing a reliable domestic EV charging network, and improving affordability by fostering an efficient modular housing industry.

By prioritizing these sectors and projects, Canada can create a resilient, future-proofed economy and ensure its industrial strategy addresses the biggest concerns of Canadians, from the cost of living to national security to building a modern, competitive economy—no matter what comes our way.





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