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# Beyond cold starts: Developing lasting progress in the North

Key insights for sustained impact

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## Introduction

Canada's Arctic and Northern regions are again at the centre of national attention. Geopolitical shifts, accelerating climate impacts, and renewed focus on sovereignty, economic reconciliation, and economic independence have sharpened national interest in the North and heightened expectations for action. While the drivers of attention feel urgent, the moment itself is not new. Historically, Canada's orientation to the North has been episodic and reactive, shaped more by strategic necessity than by sustained presence, enabling infrastructure, or long term economic participation.





Over time, relationships with Indigenous peoples have improved, yet they remain shaped by a legacy of uneven engagement, underinvestment, and mistrust. Capital investments have often been made in moments of urgency, particularly during and after the Cold War. However, they were rarely maintained or embedded within durable community and economic systems. As a result, despite defining itself as a Northern nation, Canada has not established the resilient infrastructure, institutional capacity, or enabling conditions that underpin sustained Arctic economies elsewhere. This history makes skepticism about renewed Southern attention to the North both understandable and warranted.

If this moment is to lead to different outcomes, it will require a fundamentally different approach. Progress depends not on repeating cycles of announcements and isolated projects, but on sustained, coordinated execution across infrastructure, governance, workforce, capital, and community wellbeing. It requires moving from aspiration to delivery, and from fragmented effort to system level action grounded in long-term commitment.

This document is a forward-looking point-of-view informed by the Deloitte Arctic & Northern Summit, convened on March 5, 2026. The dialogue was designed to examine real delivery constraints through problem-focused discussion, bringing together perspectives from participants across government, defence, infrastructure, Indigenous leadership, natural resources, education, and industry to explore how Northern systems function in practice. The discussion aimed to inform real decisions around how projects are sequenced, how capital is aligned, how partnerships are structured, and how accountability for outcomes is established over time. The perspective reflected here recognizes that Canada is not starting from a blank page and must better use existing assets and capabilities. It also reflects the need to remove the silos around problem solving, avoid downloading workforce and service gaps onto communities, and plan for enduring legacies rather than one off projects. At its core, this is a view of nation building that extends beyond concrete and steel, grounded in trust, shared prosperity, and shared sovereignty.



## Critical takeaways and calls to action



### Use existing infrastructure and capabilities

Build on existing infrastructure, capabilities, and proven approaches, then scale what works through deliberate sequencing rather than repeated resets. This shifts effort from replanning to execution and strengthens continuity across cycles.

Finland's mining strategy for integrated corridor enablement is an example of how to develop transport infrastructure (e.g., rail, road) in parallel with resource priorities. To avoid fragmented build-out, Finland later leveraged the same infrastructure to support tourism and broader regional economic activity.



### Address housing and training upfront to unlock workforce availability

Treat workforce availability as an outcome of housing, services, and community conditions, not an assumption. Fund readiness early, tie training to real opportunities, and reduce the burden placed on communities and proponents to solve structural workforce gaps on their own.

Nordic Arctic approaches to livability enablement highlights how housing, services, and skills development are treated as a single system to support sustained workforce participation.



### Coordinate delivery across levels of government and industry

Reduce fragmentation across programs, mandates, and delivery responsibilities by aligning priorities, capital, and accountability behind shared outcomes. Integrated decision-making increases velocity and helps enabling systems to move in parallel.

Arctic Gateway's corridor model demonstrates integrated delivery, combining port and rail infrastructure into a single trade corridor. It's supported by Indigenous ownership and enabled through coordination between government investment and industry demand for resource and trade flows.



### Plan for long-term legacy, not short-term projects

Design investments as enduring systems that support long-term prosperity and sustained presence, not one-off builds. Focus on reinvestment, value retention, and governance models that carry outcomes forward across project cycles and generations.

Arctic nations (e.g., Finland, Greenland) demonstrate long-term system planning, where infrastructure and resource development are structured over multi-decade horizons, aligned with geography, settlement patterns, and economic sustainability.

## **Foundation: Readiness and trust**

### **Readiness determines speed of delivery**

Development in the Arctic and North does not begin with construction or capital deployment. It begins with readiness. Projects struggle to advance, regardless of funding, where communities lack confidence, institutions are overstretched, or foundational systems such as housing and services are incomplete. Readiness is not a preparatory phase to be rushed through. It is the condition that determines whether development can occur in a way that is credible, sustainable, and welcomed.

Readiness requires deliberate sequencing. Workforce strategies cannot succeed without housing. Housing cannot be delivered without access, power, and supply chains. Services cannot be sustained without people willing and able to live and work in Northern communities. When development outpaces these conditions, outcomes become fragile and trust erodes. When readiness leads, delivery becomes more resilient and durable.

### **Trust and legitimacy are preconditions**

Trust is the operating system of development in the North. Without it, projects encounter resistance, delays, and uncertainty regardless of their technical merit. Legitimacy is built through early involvement, transparency, and shared accountability for outcomes. It is weakened when decisions are perceived as predetermined or when engagement occurs after key choices have already been made.

Indigenous Nations are central to this foundation. Development intersects directly with Indigenous rights, lands, governance, and long-term community priorities. Treating Indigenous governments as downstream consultees fails to reflect their authority and introduces risk rather than certainty. Sustained progress depends on Indigenous Nations being engaged as decision-makers and partners from the outset, with clarity around jurisdiction, decision rights, and long-term responsibility for outcomes.

### **Community conditions shape workforce participation**

Workforce participation in the North is inseparable from community conditions. People will not relocate or remain in communities where housing is unavailable or unfit, healthcare access is limited, or education and services are strained. Strategies that treat workforce availability as an external constraint, rather than as an outcome influenced by investment in community systems, consistently fall short.

Readiness therefore requires direct attention to housing, health, education, and safety as prerequisites to economic activity. Communities that are supported, confident, and livable are better positioned to attract and retain people, and to participate meaningfully in development opportunities. Treating these investments as secondary or compensatory undermines both workforce participation and economic outcomes.

### **Governance and local capacity matter**

Local governance capacity is a critical determinant of readiness. Northern and Indigenous governments are often expected to engage in complex negotiations, regulatory processes, and partnership arrangements without sufficient internal resources. This imbalance slows decision making and increases reliance on external actors, weakening community control over outcomes.

Investing in governance and economic development capability strengthens clarity, accelerates alignment, and provides continuity across political and leadership changes. Capacity at this level is essential infrastructure for delivery. Strong institutions anchor confidence and create the conditions under which development can proceed on a stable footing.

## Structure: Enable economic activity

### Enabling systems, not isolated assets

Economic opportunity in the Arctic and North is not constrained by ambition or potential. It is constrained by the absence of coordinated enabling systems. Transportation, energy, connectivity, and utilities operate as an interdependent system, yet have often been planned and delivered in isolation. Fragmentation increases costs, lengthens timelines, and materially limits feasibility.

In much of the North, limited access constrains housing construction, healthcare delivery, workforce mobility, and emergency response. These challenges are intensified by an underdeveloped Northern and Arctic supply chain that drives up the cost of living and development. The North is expensive not by inevitability, but because critical infrastructure systems have not been built or integrated to support long-term economic activity.

### Infrastructure sequencing and supply chain efficiency

Historically, infrastructure investment has focused on individual projects rather than system performance. Roads, airstrips, ports, power, broadband, and housing have evolved unevenly, often without regard for how they work together. The result is stranded capacity in some areas and acute constraints in others. Many of the same transportation, logistics, energy, and communications assets that enable resource development also underpin defence readiness and national presence. This makes integrated, dual-use infrastructure a practical way to strengthen sovereignty while building a durable Northern economy.

A more deliberate, system wide approach can materially change outcomes. Linking surface transportation, air access, logistics, energy, and connectivity into coordinated builds creates shared platforms that simultaneously serve communities, industry, and national priorities. Strengthening supply chains in this way reduces costs, improves reliability, and makes sustained economic participation viable.

### Development pathways and decision velocity

Structure is also defined by the clarity of development pathways. Uncertainty around permitting, land use planning, and impact and benefit frameworks introduces risk and delays. While rigorous oversight is essential, unpredictability is not. Certainty around processes, roles, and timelines improves confidence for all parties and supports better decision making.

Fragmentation across government programs further slows delivery. Multiple funding streams, mandates, and approval processes often operate in parallel rather than in concert, increasing administrative burden and diluting impact. Removing the fragmentation from decision making, aligning programs, and clarifying accountability improves velocity without compromising oversight. Improving decision velocity will require a dedicated mechanism with authority to coordinate priorities, sequence investments, and cut across departmental silos. This will help ensure Northern projects move from planning to execution without repeated resets.

### Infrastructure as public benefit systems

Enabling infrastructure in the North must be understood as public benefit systems rather than narrow projects. While significant funding has been declared over time, delivery has lagged because capital has been structured around individual projects rather than sequenced, system level investments. Funding must support readiness early and carry through design, permitting, and execution. Roads, energy systems, water, and broadband serve daily life as much as industrial activity. Evaluating these assets through short-term financial lenses obscures their broader economic and social value.

When infrastructure is planned as a shared system, it supports both development and livability. It strengthens national objectives while improving community conditions, which reinforces the social foundation of long-term presence.

## **Building: Capacity, enterprises, and local value**

### **Moving from planning to doing**

Enabling conditions and structure create potential, but outcomes depend on execution. Building a durable northern economy requires moving from planning to doing in ways that intentionally build local capacity with each cycle of activity. One-off projects and pilots do not create momentum unless they are designed to strengthen skills, institutions, and confidence over time.

Development strategies must therefore focus on repetition and learning. Each project should leave behind more capacity than it consumes, enabling subsequent initiatives to advance more quickly and at greater scale.

### **Local and Indigenous enterprises as anchors**

Local and Indigenous led enterprises are central to retaining value in the North. When ownership, governance, and decision making remain external, economic benefits leak out of communities and long-term resilience is weakened. Indigenous partnership and ownership align economic activity with community priorities while strengthening certainty and legitimacy.

Conventional procurement and contracting models often limit participation due to scale, risk allocation, or eligibility thresholds. More flexible approaches that support partnerships, phased participation, and joint ventures enable delivery while building enterprise capability over time. Procurement can be a tool for capacity building rather than a barrier to participation.

### **Project readiness and market signals**

Despite their merit, many Northern opportunities struggle to advance, because they stall before reaching investment ready status. Gaps in feasibility analysis, financing structures, and partnership design slow progress and increase risk for communities and proponents alike.

Clear demand signals around timelines, locations, and required skills allow communities, enterprises, and training providers to prepare rather than react. Improving readiness in this way increases the likelihood that projects move from concept to delivery with confidence.

### **Skills, leadership, and ownership**

Skills development in the North must extend beyond technical training. Leadership, financial management, governance, and project delivery capability are essential to sustaining enterprises and stewarding growth. Training aligned to real opportunities, delivered in ways that allow people to remain connected to their communities, improves participation and retention.

Ownership and equity structures ultimately determine whether value compounds locally. Increasing local ownership creates revenue streams that can be reinvested in housing, services, and future development, reinforcing long-term economic sovereignty.



## **Growth: Sustainable and inclusive expansion**

### **Scaling with intention**

Growth in the Arctic and North must be deliberate. Scaling before governance, workforce, and infrastructure systems are ready creates fragility and undermines trust. Sustainable expansion depends on identifying what works, strengthening it, and extending it at a pace that communities and institutions can absorb.

Growth strategies must prioritize durability over speed. Success is measured by how well outcomes endure across cycles of investment, leadership change, and market uncertainty.

### **Community and economic outcomes are linked**

Economic growth and community development are inseparable in the North. Employment opportunities cannot be sustained without housing, healthcare, education, and cultural continuity. Where community systems are strained, workforce retention declines and project outcomes weaken.

Conversely, communities that are healthy, connected, and grounded are better positioned to support long-term economic activity. Growth strategies that integrate social and economic dimensions create resilience rather than dependency.

### **Reinvestment and intergenerational value**

Long-term growth depends on reinvestment. Revenues generated through development must support infrastructure, education, housing, and future projects so prosperity compounds over time rather than dissipating at the project level. Converting finite resource development into durable public benefit requires mechanisms that capture and reinvest value over time to ensure today's growth strengthens long-term community and economic capacity. This reinvestment logic builds momentum and reduces reliance on external funding.

Approaches that convert finite resources into long-term public benefit strengthen intergenerational outcomes. They align development with stewardship and reinforce shared responsibility for future prosperity.

### **Enduring presence and self-determination**

Sustainable growth reinforces self-determination. When communities have control over development pathways, revenue flows, and reinvestment decisions, outcomes are more stable and align better with long-term priorities. Strong connections to regional, national, and global markets further support diversification and resilience.

Taken together, inclusive expansion reflects a shift from episodic projects to enduring systems. It strengthens institutions, anchors presence, and ensures that renewed attention on the North translates into lasting shared prosperity and shared sovereignty. Sustained progress also depends on building broader public sensitization of the North as central to Canada's future, reinforcing long-term political, economic, and social commitment.

It's time to explore new ways of working with Northern communities and leaders, using approaches like joint advisory tables to find effective solutions together.

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