

STRATEGIC INSIGHTS REPORT

ONTARIO CRITICAL MINERALS FORUM

TORONTO, 2025

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1. Executive Summary

The Ontario Critical Minerals Forum convened leaders from across the mining, energy, finance, and government sectors at a critical juncture for the industry. Discussions revealed a strong consensus that Ontario possesses a generational opportunity to become a global leader in the ethical and secure supply of critical minerals. However, capitalizing on this potential is contingent upon immediate, decisive, and coordinated action. The overarching sentiment was one of **cautious optimism**, buoyed by unprecedented government alignment and investment, yet tempered by the significant hurdles of execution.

Four macro-level themes dominated the discourse:

- **Indigenous Partnership as the Cornerstone of Success:** The dialogue has fundamentally shifted from viewing Indigenous engagement as a risk to be managed to embracing it as a core strategic advantage. Meaningful, early-stage partnerships—particularly those involving equity ownership—are now widely recognized as the most effective mechanism to de-risk projects, accelerate timelines, and ensure long-term stability.
- **The Urgent Need for Speed and Certainty:** Geopolitical instability, particularly Chinese market dominance and US trade volatility, has created a narrow window of opportunity. Speakers consistently emphasized that slow, complex, and unpredictable permitting and regulatory processes are the single greatest threat to attracting capital and achieving supply chain security. Government initiatives to streamline approvals are welcomed, but the government must implement them rapidly and effectively.
- **Building the Entire Value Chain, Not Just the Mine:** A clear consensus emerged on the need to move beyond a "rip and ship" model. Securing Ontario's global competitiveness requires significant investment in midstream processing and refining, as well as downstream integration with end-users like the automotive and defence sectors. This requires a holistic approach that connects mining with energy, infrastructure, and manufacturing.
- **Confronting Capital and Market Volatility:** While governments are mobilizing significant public capital, attracting the necessary scale of private investment remains a challenge. Commodity price volatility, which state actors manipulate, undermines the bankability of projects. Forum participants identified innovative financial instruments, such as government-backed price guarantees and new funding models for shared infrastructure, as critical tools to bridge this gap.

The Forum underscored that while the strategic intent and political will are present, the true test lies in execution. Success will be defined by the ability of all stakeholders—government,

Strategic Insights from the Ontario Critical Minerals Forum, 2025

industry, Indigenous Nations, and investors—to collaborate effectively to build projects faster, secure the full value chain, and create the stable, predictable environment necessary for long-term investment and shared prosperity.

2. Key Themes and Trends

The discussions at the Forum coalesced around five interconnected themes that define the current operating environment for critical minerals in Ontario. These themes span strategic partnerships, managing global volatility, operational execution, financial de-risking, and building a fully integrated domestic supply chain.

2.1 The Primacy of Indigenous Partnerships as a Strategic Enabler

A defining theme of the forum was the universal recognition that **meaningful Indigenous partnership** is no longer a "checkbox" but the central pillar for successful project development. The narrative has evolved from risk mitigation to value creation, with speakers from industry, finance, and Indigenous organizations highlighting how early, equitable engagement accelerates projects and unlocks capital.

2.1.1 From "Risk" to "Opportunity"

The most significant shift in dialogue is the reframing of Indigenous relations. Proponents and financiers now view authentic partnerships as a competitive advantage that provides stability and certainty.

"And embracing at Hydro One the opportunity that exists through indigenous partnerships rather than thinking about managing the indigenous risk. And that's where we were a few short years ago... shifting away from the worry about indigenous risk and embracing the indigenous opportunity, not only because it's the right thing to do from a reconciliation perspective, but it's driving economic competitiveness in terms of Ontario's ability to deliver."

— **Matthew Jackson**, Vice President, Indigenous Partnerships and Business Development at Hydro One

2.1.2 Equity as the New Standard for Partnership

The conversation has moved beyond traditional Impact Benefit Agreements (IBAs) toward models centered on direct **equity ownership**. This is seen as the key to aligning interests, sharing prosperity, and ensuring projects are co-developed, not just consulted on. The government is designing new financing vehicles to facilitate this shift.

"The nations that are succeeding today are the ones that are moving at the speed of business... Equity is on the table now. It should be part of the regular conversations you were having with communities."

— **JP Gladu**, Principal at Mokwatch & Member, Indigenous Advisory Committee, Major Projects Office

"We've always talked about, you know, becoming owners at any kind of major project that happens. And now we have those abilities to do that... it is one thing to sign an agreement, but it is another thing to actually become an owner of this company."

— **Chief Bruce Archibald**, Chief at Taykwa Tagamou Nation

2.1.3 Accelerating Timelines and De-risking Projects

Speakers provided tangible evidence that Indigenous-led processes and partnerships directly lead to faster and more predictable project execution, challenging the misconception that engagement causes delays.

"[The Chatham to Lakeshore transmission line] was 18 months ahead of schedule and 10 or 15% below budget. And that's a direct link because they were partnered with the nation. And so, you know, we always hear in the press these negative comments about, oh, you're going to deal with it. First Nations going to slow. Actually, no, if you lean in and do it right... you'll see your project will move much more rapidly."

— **Fred Di Blasio**, Co-Founder, Managing Partner and CEO at Longhouse Capital

2.1.4 Sentiment Analysis

The sentiment on this theme was overwhelmingly **positive and optimistic**. There is a strong sense of momentum and a shared understanding of the path forward. However, challenges were noted regarding the capacity of First Nations to engage effectively with the many project proponents seeking partnership and the need for fair, standardized processes.

2.2 Navigating the Triad of Volatility: Geopolitical, Regulatory, and Market Forces

A persistent undercurrent of uncertainty defined discussions around global competitiveness and investment. Speakers identified a challenging operating environment shaped by aggressive foreign trade practices, domestic **regulatory hurdles**, and fluctuating commodity markets.

2.2.1 Geopolitical Headwinds and Supply Chain Insecurity

Speakers cited China's strategic dominance of processing and refining, coupled with increasing trade tensions and tariffs with the United States, as the primary driver for building a secure domestic supply chain.

"When it comes to trade policy, there is an audience and an architect of one, which is President Trump... President Trump sees Canada like every other country he negotiates with, not as a friend or an ally, but as a counterparty."

— **Eric Miller**, President at Rideau Potomac Strategy Group

"You can't blame China for doing that. But if we are concerned about it, then we need to start deploying capital now."

— **Julian Kettle**, Vice Chair, Metals & Mining at Wood Mackenzie

2.2.2 The Cost of Regulatory Uncertainty

While government efforts to streamline permitting are underway, industry leaders expressed deep frustration with current timelines and "moving goalposts," which are seen as a major deterrent to investment.

"What's the killer of business? It's uncertainty and its volatility... We got to the end of a project... 300, he called it 300, I think it was a little bit more. And the goalpost changed on the environmental standards. We've just spent \$300 million."

— **Mark Passi**, Energy Manager at Glencore

"Today, opening a new mine... could take up to 10 to 15 years... If we can give industry a clear line of sight on timing, financing will follow."

— **Giancarlo Drennan**, Vice President, Ontario Practice Group Lead at Sussex Strategy Group

2.2.3 Market and Price Volatility

The volatility of commodity prices, particularly for base metals like nickel, was highlighted as a critical barrier to financing new projects. The discussion pointed to market manipulation by state actors and the need for new mechanisms to provide price stability.

"The prices are a market signal to investors... we see there's been a major volatility and that type of price volatility... is not giving the right confidence to the investor... The argument is... that China has been able to, through its control... play this market manipulation role to drive prices down, to suppress investments in mining and refining in the West."

— **Moe Kabbara**, President at The Transition Accelerator

2.1.4 Sentiment Analysis

The sentiment on this theme was **cautious and concerned**. While the geopolitical challenges create the *reason* for Ontario's strategy, the combination of external threats and internal regulatory friction creates a high-risk environment that could stifle the very progress that is needed.

2.3 Closing the Execution Gap: From Policy to Shovels in the Ground

Across all panels, speakers conveyed a powerful sense of urgency. Speakers stressed that while strategic plans and funding announcements are crucial first steps, the ultimate measure of success will be the ability to execute projects quickly and efficiently. This theme centered on the practicalities of building essential infrastructure and streamlining complex regulatory pathways.

2.3.1 The Imperative for Speed

The government's commitment to accelerating project timelines was a central topic, with a clear mandate to reduce bureaucratic delays.

"The thesis of today is speed... the legacy priority that I was given a mandate to achieve is cut the permit timelines in half, give certainty to investors at home and abroad that you will get to yes in a sensible manner."

— **Hon Stephen Lecce**, Minister of Energy and Mines at Government of Ontario

2.3.2 Building Enabling Infrastructure

The critical link between mining development and enabling infrastructure—particularly energy and transportation—was a recurring point. Major investments are required to unlock resource-rich regions like the Ring of Fire and support the massive growth in electricity demand.

1. Ontario is facing unprecedented demand for energy, with **Carla Nell** of IESO forecasting demand in Northern Ontario to increase by up to **80% by 2050**.
2. The "Big Build" initiative includes **14 new transmission lines** and **\$12 billion** in investment, as noted by **Matthew Jackson** of Hydro One.

"We have to get into the discipline of building around consensus items with communities... Developing a corridor for road access that could supply clean and sustainable electrification."

— **Hon Greg Rickford**, Minister of Indigenous Affairs and First Nations Economic Reconciliation, Government of Ontario

2.3.3 The Challenge of Permitting Reform

Despite high-level commitments to faster approvals, deep concerns remain about the complexity and implementation of new processes. Experts cautioned that without genuine coordination and respect for Indigenous consultation, reforms could create more uncertainty.

*"The **ECA** that I talked about, once that permit application submitted, it's a 365 day service window... So it is a very long process. It is a delay."*

— **Sheldon Smith**, Senior Hydrologist at Stantec

"First nations and industry are not the bottleneck... it's government that's the bottleneck. It's the processes that government puts in place that make us all jump to their tune."

— **Jason Batise**, Executive Director at Wabun Tribal Council

2.1.4 Sentiment Analysis

The sentiment here was **mixed**. There is strong optimism about the political will to accelerate development, but significant skepticism and concern remain regarding the government's ability to execute these reforms effectively on the ground.

2.4 De-risking and Unlocking Capital Across the Value Chain

Financing the development of Ontario's critical minerals sector requires a multi-faceted approach to de-risk projects and attract a combination of public and private capital. Discussions highlighted the creation of new government funds, the challenge of securing capital for junior miners, and the need for innovative financial tools to ensure project viability.

2.4.1 Mobilizing Public and Private Capital

Both federal and provincial governments have launched an array of new funds and agencies to catalyze investment by providing guarantees, taking on early-stage risk, and crowding in private capital.

- The federal government launched a **\$2 billion** Critical Minerals Solvent Fund and a **\$1.5 billion** First and Last Mile Fund, according to **Isabella Chan** of Natural Resources Canada.
- The provincial Building Ontario Fund has been seeded with **\$8 billion**, and the Indigenous Opportunities Financing Program has a **\$3 billion** envelope, as noted by **Anca Drexler** and **Giancarlo Drennan**.

"Our mandate is to catalyze private sector investment into revenue generating infrastructure that creates a public benefit. And so through our participation we seek to be the difference maker that allows the project to go forward."

— **Anca Drexler**, Chief Investment Officer at Building Ontario Fund

2.4.2 The Role of Price Certainty and Offtake Agreements

A key barrier to financing is market price volatility. Speakers presented government-backed price guarantees or "contracts for difference" as a powerful tool to provide revenue certainty, making projects more attractive to private investors.

"If you turned into a utility, I mean that's a very different risk profile for investors. It's a very different cost of capital. So yeah, that was a very effective tool [referencing the MP Materials deal]."

— **Hugh Samson**, Co-Head, Global Metals & Mining Investment Banking at RBC Capital Markets

2.4.3 Supporting the Full Project Lifecycle

A significant gap exists in funding for early-stage and junior exploration companies, who face a "valley of death" in advancing projects to a bankable stage. There is a recognized need for more flexible capital to get projects to the Final Investment Decision (FID) point.

"To me, the challenge is getting the projects to the point where that capital is ready to invest in them. And that's where the gap is... the money we need is to get those projects [to] FID."

— **Alden Greenhouse**, Vice President of Critical & Strategic Minerals at Agnico Eagle Mines

2.1.4 Sentiment Analysis

The sentiment was **constructively optimistic**. The scale of available public funding is seen as a game-changer. However, there is a clear call for better coordination between funding bodies and more tailored support for the "missing middle" of project development.

2.5 Building a Resilient and Integrated Domestic Supply Chain

A strategic imperative woven through the forum was the need to build an end-to-end critical minerals ecosystem in Ontario. This involves not only mining but also investing in **midstream processing**, downstream manufacturing, workforce development, and a circular economy to create a secure, competitive, and self-sufficient supply chain.

2.5.1 The Midstream Imperative: Processing and Refining

There was strong agreement that Ontario and Canada must capture more value by developing domestic processing and refining capacity, breaking the reliance on offshore, primarily Chinese, facilities.

"Why midstream refining control - not just raw material extraction - is key to Ontario's global competitiveness... If you control the oil refining, the margins were more predictable. You could control the business more predictably and it was just a smarter way to go forward."

— **Pat Ryan**, Chairman and CEO, Ucore Rare Metals

2.5.2 Linking Upstream with Downstream Demand

The importance of connecting miners with end-users in the automotive and defence sectors was emphasized. However, downstream players noted that demand for EVs has slowed, creating a pause that allows for more strategic, less frantic supply chain development.

"That sense of urgency is over. And in its place is a very measured approach looking at what it is exactly we think we might need in the next five years... We really haven't done the investing we needed to do in that middle."

— **Sarah Goldfeder**, Executive Director - Government Relations and Corporate Affairs at GM

2.5.3 The Workforce and Talent Gap

Multiple industry leaders identified the growing shortage of skilled labor, from tradespeople to engineers, as a critical bottleneck needed to build and operate new mines and facilities.

"As we as a country not only need more, but want to build more mines, we are going to need more skilled people... It's very difficult to find people."

— **Jason Jessup**, CEO and Founder at Magna Mining & **Zachary Mayer**, Vice President, Sudbury Operations at Glencore (paraphrased)

2.5.4 The Circular Economy Opportunity

Indigenous-led partnerships in battery recycling are emerging as a key component of a truly sustainable and circular supply chain, ensuring that critical minerals are kept within the domestic ecosystem.

"If we can keep an ounce of minerals in the supply chain and stop it from having to mine another ounce out of the ground, that's a successful story from an Indigenous perspective."

— **Reggie George**, Executive Director - Special Projects and Partnerships at Three Fires Group

2.1.4 Sentiment Analysis

The sentiment on this theme was **ambitious but pragmatic**. There is a clear vision for an integrated supply chain, but speakers acknowledged immense challenges in building out midstream capacity and solving the skilled labor shortage.

3. Opportunities and Challenges

The realization of Ontario's critical minerals potential is balanced between significant inherent advantages and persistent systemic hurdles. This section details the key opportunities that create a powerful environment for growth, and the structural challenges that must be overcome to secure long-term competitiveness.

3.1 Key Opportunities

- **Unprecedented Government Alignment:** Strong, unified support from both federal and provincial governments, backed by significant funding, creates a powerful tailwind for the sector. New vehicles like the **\$3 billion** Indigenous Opportunities Financing Program (IOFP) evidence this alignment and the **\$15 billion** Canada Growth Fund (CGF), designed to crowd in the necessary private investment.
- **Indigenous Partnership as a Competitive Advantage:** Mature and evolving models for Indigenous equity participation offer a unique Canadian advantage for de-risking projects and ensuring long-term stability. Partnerships centered on equity and co-development actively de-risk projects, providing stability and certainty, as demonstrated by projects running ahead of schedule and under budget when co-managed.
- **Clean Energy Grid:** Ontario's low-carbon electricity grid provides a significant ESG advantage for attracting investment in energy-intensive mining and processing, as highlighted by **Julian Kettle** of Wood Mackenzie. With 90% clean energy, Ontario offers a unique value proposition for energy-intensive processing, positioning it as the preferred supplier for global manufacturers prioritizing low-carbon production.
- **Established Mining Ecosystem:** Ontario's existing infrastructure, operational expertise, and deep talent pool in established mining camps like Sudbury provide a strong foundation for "brownfield" expansion and new development. Existing infrastructure, including operating mills, smelters, and refineries in regions like Sudbury, significantly lowers capital barriers for new projects and supports rapid brownfield expansion.
- **Geopolitical Imperative:** The global push to de-risk supply chains away from China and Russia creates a strategic market opportunity for a reliable, ethical supplier like Ontario. External instability, particularly Chinese market control and US trade volatility, creates a powerful strategic need for Ontario to rapidly scale up as a reliable supplier to NATO and allied markets.

3.2 Persistent Challenges

- **Regulatory and Permitting Delays:** Despite reforms, the time, complexity, and uncertainty of the approval process remain the most significant barrier to investment. Despite political commitments, current processes—such as the mandatory 365-day service window for Environmental Compliance Approvals (ECA) submissions—still create protracted timelines that erode investor confidence.
- **Infrastructure Deficits:** A lack of road, rail, port, and transmission infrastructure in remote and northern regions, particularly the Ring of Fire, inhibits the development of key mineral deposits. The industry requires massive upfront capital for new transmission lines, roads, and logistics, particularly to unlock remote deposits, posing a burden that individual projects cannot bear alone.
- **Capital Scarcity and Market Volatility:** Securing private capital is difficult due to volatile commodity prices, high upfront capital costs, and a lack of risk appetite for junior mining projects. Global market manipulation and high capital expenditure requirements for greenfield projects demand innovative instruments like government-backed price guarantees (CFDs) to provide necessary revenue certainty.
- **Skilled Workforce Shortage:** A critical lack of skilled trades, engineers, and geologists threatens the industry's ability to execute on its growth ambitions. A critical deficit exists across the board, from skilled trades and maintenance technicians required for construction to experienced engineers and geologists needed for exploration and operation.
- **Midstream Processing Gap:** Canada's lack of at-scale midstream processing and refining capacity forces reliance on foreign partners and cedes significant economic value to other jurisdictions. The absence of sufficient domestic refining and conversion capacity—particularly for battery materials—is the core vulnerability that prevents Canada from capturing downstream value and ensuring true supply security.

4. Evolving Narratives

The forum revealed several important, progressive shifts in the collective narrative surrounding critical minerals development. These changes reflect a maturing industry perspective, moving away from old paradigms of resource extraction toward integrated supply chains, genuine co-development with Indigenous partners, and a focus on systemic rather than individual project viability.

- **From Consultation to Co-Ownership:** The most profound shift was the evolution of the Indigenous engagement narrative. The conversation has decisively moved past the concept of "consultation" as a procedural step. The new paradigm, championed by Indigenous leaders and increasingly adopted by industry and government, is one of **co-ownership and true partnership**. Equity is now seen not just as a financial transaction but as a mechanism for shared decision-making, jurisdiction, and long-term alignment.
- **From Extraction to Full Value Chain Integration:** The focus has broadened significantly from solely upstream mining to a holistic, "mines-to-mobility" value chain. There is a strong consensus that Ontario's long-term success depends on capturing value in the **midstream** (processing, refining) and integrating with the **downstream** (automotive, defence). This marks a strategic shift away from being a mere resource exporter.
- **From Urgency to Strategic Patience (in the Downstream):** While the upstream and government sectors are operating with immense urgency, downstream partners in the automotive industry (**Sarah Goldfeder**, GM) signaled a tempering of this urgency. Slower-than-expected EV adoption has created a "pause," allowing for more measured and strategic supply chain development rather than a frantic race for offtakes. This creates a potential timing mismatch that will require careful management.
- **From Individual Projects to System-Wide Enablement:** The dialogue has matured from focusing on the viability of individual mines to discussing the systemic enablers required for an entire sector to thrive. This includes large-scale enabling infrastructure (power, roads), innovative de-risking financial tools (price guarantees), and broad workforce development strategies.

5. Strategic Recommendations

Based on the insights gathered, the following strategic recommendations are proposed for key stakeholder groups:

5.1 For Government and Regulators

- **Aggressively Implement and Resource Permitting Reforms:** Move beyond legislation to on-the-ground implementation of "One Project, One Process." Establish clear, transparent, and binding timelines for government reviews and create a true "concierge" service to help proponents navigate the system.
- **Deploy Innovative Financial De-risking Tools:** Actively develop and deploy financial instruments like contracts for difference (CFDs) and price floor guarantees for strategic projects to counter market volatility and improve bankability, as suggested by **Moe Kabbara**.
- **Prioritize and Fast-Track Enabling Infrastructure:** Coordinate federal and provincial efforts to accelerate the construction of critical roads, ports, and transmission lines that unlock multiple projects, particularly in the Ring of Fire and other northern regions.
- **Champion a Pan-Canadian Workforce Strategy:** Partner with industry, educational institutions, and Indigenous organizations to launch a national campaign to attract talent to the mining sector and fund the expansion of relevant training programs.

5.2 For Industry Proponents (Mining & Energy)

- **Embed Indigenous Partnership as a Core Business Strategy:** Move beyond engagement teams and integrate partnership development into corporate strategy from the earliest stages of exploration. Proactively offer equity partnership models.
- **Collaborate on Shared Infrastructure:** Work with industry peers and government agencies to jointly fund and develop shared infrastructure (e.g., roads, power) to reduce individual project capital burdens.
- **Invest in Technology and Innovation to Drive Competitiveness:** Double down on technologies that improve efficiency, lower costs, and enhance ESG credentials to compete with lower-cost jurisdictions on factors other than price.
- **Engage Proactively with Downstream Users:** Build direct relationships with automotive, defence, and technology companies to understand their long-term needs and co-develop secure, traceable supply chains.

5.3 For Investors and Financial Institutions

- **Develop New Financial Models for Indigenous Equity:** Create innovative, flexible financial products that facilitate Indigenous equity participation, leveraging new government loan guarantee programs to reduce risk.
- **Look Beyond Short-Term Commodity Cycles:** Acknowledge the long-term strategic imperative for secure, ethical mineral supply chains and factor geopolitical risk and ESG credentials more heavily into investment theses.
- **Fund the "Missing Middle":** Create specialized capital pools aimed at junior and development-stage companies to help them bridge the "valley of death" between discovery and a bankable feasibility study.

5.4 For Downstream End-Users (Automotive, Defence, Technology)

- **Provide Long-Term Demand Signals:** Engage in long-term offtake agreements and strategic partnerships with upstream and midstream producers to provide the revenue certainty needed to secure project financing.
- **Co-invest in Midstream Capacity:** Explore joint ventures and direct investments in Canadian processing and refining facilities to secure a reliable and compliant supply of battery materials, as a hedge against geopolitical risk.
- **Champion Traceability and ESG Standards:** Leverage purchasing power to demand and reward traceable, ethically produced minerals, helping to create a "green premium" that allows Canadian producers to compete globally.



6. Snapsight

6.1 About Snapsight

Snapsight is an AI-powered insights platform that transforms your organization's content into actionable insights. We analyze event sessions, surveys, industry reports, internal documents, and more, empowering your organization to make data-driven decisions that drive growth and innovation.

Insights-as-a-Service: Your Affordable Insights Solution. Our team of experts partners with you to analyze your data and deliver customized reports that answer your most critical questions. We help you:

- **Identify Emerging Trends:** Uncover key themes, competitor strategies, and market shifts before your rivals.
- **Understand Stakeholder Sentiment:** Gauge member needs, public perception, or internal sentiment to inform your strategies.
- **Make Data-Driven Decisions:** Move beyond guesswork and base your choices on insights derived from your own data.
- **Save Time and Resources:** Let our AI and experienced analysts handle the heavy lifting, freeing your team to take action.