



DEFENCE MARKET ACCESS SERIES

# Getting In the Door

How dual-use innovators actually enter Canada's defence market

**Webinar 1**

June 24, 2026

# OPENING REMARKS



**Elysa Darling**  
DIGITAL, COO

We are grateful to the people of the x<sup>w</sup>məθk<sup>w</sup>əy<sup>ə</sup>m (Musqueam), Skwxwú7mesh (Squamish), and Selílwitlh (Tseil-Waututh) Nations for sharing and stewarding these lands.



Musqueam  
First Nation



Skwxwú7mesh  
Úxwumixw  
Squamish Nation





**Established in 2018 under the Government of Canada's Supercluster Initiative,** DIGITAL accelerates the development, adoption, and commercialization of Canadian technologies across sectors critical to Canada's economic growth including mining and energy, housing, workforce development, health, and now defence and dual-use.



# Built in Canada. Ready for the World.

## OUR MISSION

*DIGITAL brings together technology builders and buyers to accelerate the adoption and commercialization of Canadian technology solutions.*



## THE SERIES

# A journey into Canada's defence market

Five sessions. DIGITAL convenes, the credibility comes from across the ecosystem.

1

## Getting In the Door

How to enter the market

WE ARE HERE

2

## Speaking Defence

Positioning your tech for buyers

3

## How Money Moves

Funding & procurement mechanisms

4

## Working with Primes

Prime relationships, ITB & content

5

## Partnerships & IP

Alliances while protecting IP

**After the series:** *select participants may be invited to closed, invitation-only Defence Showcases with buyers and primes.*



## WHO'S IN THE ROOM

# A quick read of the room

A snapshot of who has registered: skews early, with most still scoping whether defence applies to them.

**337**

registrations

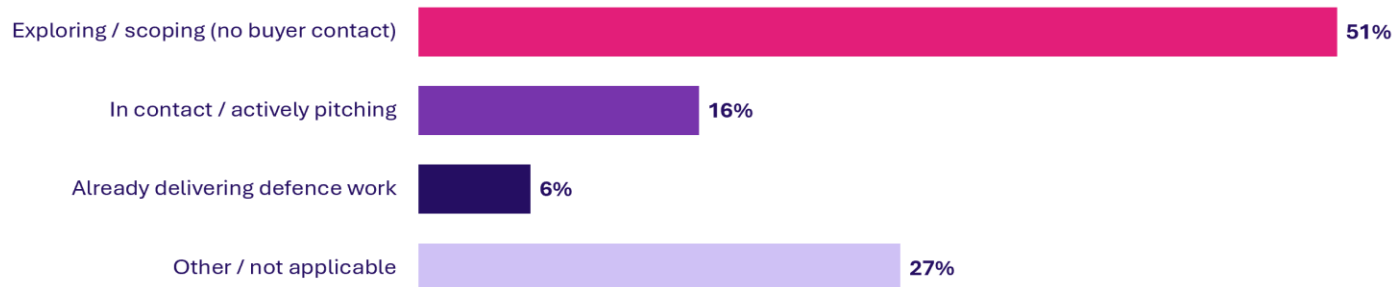
**58%**

are companies with technology,  
product, or service

**55%**

of companies are under \$2M  
revenue (incl. pre-revenue)

### How far along the room is in defence:



# OPENING REMARKS



**John Knubley**

Former Deputy Minister

# MODERATOR REMARKS



**Genevieve Bonin**

DIGITAL Executive  
Senior Advisor



## WHY NOW

# A critical inflection point for defence globally

Global military spending is rising at the steepest pace since the Cold War – a genuine inflection point for defence and dual-use technology.

**\$2.72T**

record world military spending in 2024 (SIPRI)

**+9.4%**

the sharpest annual rise since the Cold War (SIPRI, 2025)

**1.5%**

of GDP now pledged to innovation & the defence-industrial base (NATO, 2025)

**€800B**

projected NATO-Europe defence spending by 2030 (McKinsey, 2026)



The fastest-growing part of this spending – innovation and the defence-industrial base – is exactly where commercial, dual-use technology fits.



## WHY NOW

# What this means for Canada's defence market

Canada's first Defence Industrial Strategy (Feb, 2026) put serious money – and a clear demand signal – behind dual-use innovation.

## \$81.8B

reinvestment in the Canadian Armed Forces (Budget 2025)

## 5%

of GDP – defence spending by 2035 (NATO pledge)

## 70%

target share of defence acquisitions to Canadian firms (DIS, 2026)

## 92%

of Canada's defence firms are SMBs (DIS, 2026)



The strategy is explicitly pulling in commercial & dual-use innovation – AI, sensors, quantum, cyber, space, simulation and autonomous systems – while tariffs sharpen the Canadian-content advantage. **The window is real. It's also crowding fast – early, informed movers win.**



## THE LANDSCAPE

# Who's who in defence

A shared vocabulary before the journey. We go deeper on each across the series.



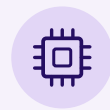
### Buyers

DND / CAF – the end users



### The new agency

Defence Investment Agency (DIA) & “BUILD-PARTNER-BUY” framework



### R&D & innovation

DRDC · IDEaS · BOREALIS · NRC IRAP



### Primes

CAE · L3Harris · Thales · Boeing · Many others



### Enablers

NRC IRAP · clusters (like DIGITAL) · Big Four



### Going deeper

We will cover work with them at future sessions



## The non-negotiables

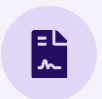


**The front door is a contract vehicle and a relationship – not a compliance checklist.** Compliance matters, but it's sequenced after. Start the long-lead items (clearances) early, in parallel.



### Security clearances

Personnel & facility – historically 12–16 months; the strategy commits to speeding this up. Start early.



### Controlled Goods

Registration to handle controlled technology and data.



### ITAR / TAA

US-origin tech rules – do your homework when working with US defence entities.



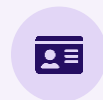
### Cyber certification

Canadian Program for Cyber Security Certification (CPCSC) for defence supply chains.



### HR & workforce

Bringing people along on the mission



### Distributed teams

Remote-work security carries real cost, some work can't be done remotely.



## Run parallel tracks



### Civilian track

- Fast cycles
- Recurring revenue – keeps the lights on
- Proves the technology in market



### Defence track

- Long cycles
- Strategic, larger contracts
- Builds sovereign credibility – but slow to close

**Don't burn the company chasing small sole-source deals on long defence timelines.** Be realistic about deal size – much defence spend is labour and capital, not technology.



## DEFENCE STARTING MAP

# Find your starting point

Canada's defence ecosystem is broad. Start where you are and expand.



### Navigate & partner

*Finding your way in defence?*

ISED Concierge Service and Accelerated Growth Services · Clusters (DIGITAL, NGen, others) · Canadian Association of Defence and Security Industries (CADSI) · Aerospace Industries Association of Canada (AIAC)



### Develop (R&D)

*Building new tech?*

Innovation for Defence Excellence and Security (IDEaS) by DND · BOREALIS · Innovative Solutions Canada (ISC) · NRC IRAP Defence Industry Assist



### Test & demonstrate

*Prototype ready?*

ISC Testing Stream · CSA Space Technology Development Program · NRC Drone Innovation Hub · NRC IRAP · IDEaS DISH



### Accelerate

*Need support of experts?*

CDL Defence Stream · Communitech NATO DIANA · COVE NATO DIANA · Vimy Forge · Calian Ventures · Alacrity Arc Lab · Arctech Accelerate



### Find customers

*Want to meet buyers?*

CANSEC · DEFSEC West · DEFSEC Atlantic · Western Innovation Forum · others



### Scale & finance

*Commercializing?*

Regional Defence Investment Initiative (RDII) through RDAs (PacifiCan, FedDev, others) · BDC Defence Platform · Strategic Response Fund (SRF) · Canadian Defence Industry Resilience (CDIR)

*Starting point only — confirm available programs and eligibility directly with each organization.*



## DEFENCE STARTING MAP

# Find your starting point

Canada's defence ecosystem is broad. Start where you are and expand.



### Procure & comply

*Navigating procurement?*

CanadaBuys · NATO Support and Procurement Agency · Defence Capabilities Blueprint (DCB) · Industrial and Technological Benefits (ITB) Policy · Controlled Goods Program



### Export

*Selling abroad?*

CanExport SMEs by Trade Commissioner Service · Export Development Canada (EDC) · Canadian Commercial Corporation (CCC) · Canadian International Innovation Program (CIIP)



### Find investors

*Looking for investors?*

BDC StrongNorth fund · BDC Catalyst Innovation Fund · Calian Ventures · NATO Innovation Fund · Kensington/ONE9 · Garage Capital · others



### Policy and Research

*Looking for thought leadership?*

Conference of Defence Associations (CAD) Institute · Canadian Defence and Security Network (CDSN) · North American and Arctic Defence and Security Network (NAADSN)

*Starting point only — confirm available programs and eligibility directly with each organization.*

Defence Market Access Series

# Getting in the Door:

*How dual-use innovators can enter Canada's defence market*

WEBINAR



June 24



10 AM (PST) | 1 PM (EST)



**Genevieve Bonin**

DIGITAL Executive  
Senior Advisor



**John Moore**

CEO, mflQ



**Nandini Jolly**

President & CEO, Cryptomill  
Cybersecurity Solutions



**Matt Murdoch**

Director, EarthDaily



Driving real results for Canada.



[DIGITAL dual-use portfolio](#)



**Artyom Mamzhiev**

Senior Innovation Strategist (Dual-Use Lead)



[amamzhiev@digitalsupercluster.ca](mailto:amamzhiev@digitalsupercluster.ca)