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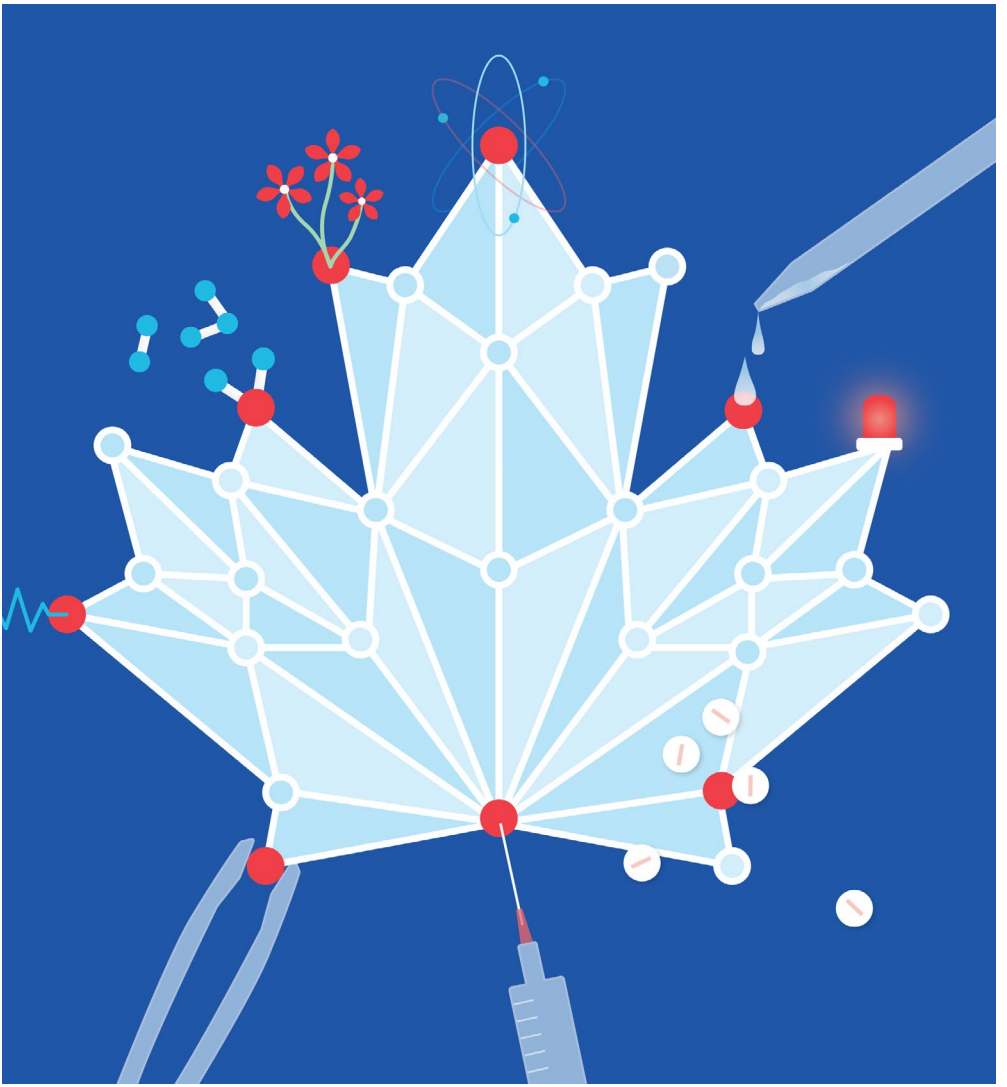
Canada's Code Red

An urgent playbook to build an economy-boosting life sciences sector

BY CHRISTOPHER WADDELL



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Executive Summary

Canada's life sciences sector faces an unprecedented crisis. A shifting geopolitical and economic landscape – in large part the result of policies pursued by the United States – has led to disruption in relations and trade. These emerging challenges have exposed vulnerabilities in Canada's life sciences supply chains and increased public health risks. But with crisis comes opportunity.

This report highlights how Canada's traditional approaches to health security need to change to address these challenges and respond to new opportunities in a changing world. Building on lessons from the COVID-19 pandemic, Canada must urgently adopt bold strategies to strengthen its life sciences sector. Such action, taken swiftly, will ensure the sector continues to thrive – generating strong growth, supporting healthy Canadians and creating a competitive Canada.

The report details six critical plays:

1

Recognize Canada faces a national health security emergency

To enable rapid legislative and regulatory changes, the federal government must recognize Canada faces a national health emergency, fostering urgency in decision-making and eliminating bureaucratic impediments.

2

Fast-track Health Emergency Readiness Canada (HERC)

Accelerating the operationalization of HERC can facilitate preparedness for future health emergencies through national coordination in research, supply-chain management, and response strategies.

3

Create a Canadian life sciences performance scorecard

The federal government must establish ambitious and meaningful goals to measure progress in areas such as R&D investment, workforce development, innovation output, and manufacturing capacity. Overseen by a panel of public sector, private sector and patient advocate experts, this scorecard will serve as a tool for accountability and attracting foreign investment.

4

Develop a national recruitment strategy for life science talent

Current and future skills gaps should be identified before developing a targeted recruitment strategy with competitive salaries. Immigration processes must be streamlined to attract international health and scientific researchers, including those alienated by current U.S. policies and prevalent anti-science attitudes.

5

Adopt a 'made in Canada' approach to life science investment and procurement

Prioritize the build-up of domestic capabilities in life sciences manufacturing, research, and innovation to reduce reliance on the U.S. while facilitating a 'buy Canadian' approach in life sciences regulations and procurement.

6

Unlock our health data as an asset for Canada

Canadian health data represents a massive untapped resource, that when unlocked can boost our competitiveness globally. To do this, common standards for data collection and storage need to be implemented across provinces. Barriers to its use must be removed to allow our health data to be harnessed to improve decision-making, resource allocation and technological advancements.

By implementing these plays, Canada can mitigate risks posed by its strained relationship with the United States while positioning itself as a global leader in innovation and resilience. It is time to act decisively and secure Canada's successful future in an increasingly unpredictable world.

INTRODUCTION

The need for urgency

Since COVID-19, Canada has been acting to improve its health security. Success came in September 2024, with the creation of Health Emergency Readiness Canada (HERC): a national health security agency with a core focus on building the life sciences sector operating under Innovation, Science and Economic Development Canada (ISED) and Health Canada. Once fully operational, HERC aims to give Canada the knowledge and relationships to respond confidently to future challenges, fostering innovative collaboration with regional agencies and institutions such as the European Union's Health Emergency Preparedness and Response Authority, the Health Security Agency in the United Kingdom and the Japan Institute for Health Security.

The chaotic approach to policymaking by the current U.S. administration has created unprecedented levels of uncertainty, with the administration's health policies putting the health of Canadians at risk

However, while these developments have been taking place, a new unexpected disruption has emerged to threaten Canada's health security. The chaotic approach to policymaking by the current U.S. administration has created unprecedented levels of uncertainty, with the administration's health policies putting the health of Canadians at risk.

America's hyper-protectionist approach to trade has disrupted supply chains and led to product shortages that could worsen health outcomes. At the same time, an anti-science and anti-vaccine mentality has led to the U.S. abdicating its long-standing role as global leader in the fight against pandemics and is contributing to the spread of diseases such as measles and avian flu to Canada. The shape of this new threat is exemplified by a recent decision by the U.S. Department of Health and Human Services to cancel a nearly $830 million contract to develop, test and license vaccines for flu variations that could trigger future pandemics.

If ignored, this new reality represents as significant a threat to the health of Canadians as COVID-19. However, unlike COVID-19, the threat will not gain all the headlines. Product shortages will become apparent gradually, hitting those most in need first. Incidences of preventable disease will creep up on us, with cluster breakouts in our communities causing pressures on already squeezed services. The lack of

global leadership in the fight against pandemics will first impact populations seemingly far from home, covered only in bulletins towards the end of the news. But the results will soon be at Canada's doorstep and impacting Canadians along with the rest of the world.

This new emergency may not feel as immediate as the last, but the impact will be as real and the consequences as hard.

As with COVID-19, such a historic crisis requires an ambitious response. Canada's previous approach must now give way to new urgency and objectives, with all levels of government rising to the challenge at speeds hitherto thought impossible or impractical – but now essential to ensure Canada's health security. To achieve radical change, we need a radical mindset shift.

As the U.S. withdraws from global health leadership, Canada must play a significant role in filling this gap

- As the U.S. withdraws from global health leadership, Canada must play a significant role in filling this gap, helping to lead the global fight against infectious disease and countering anti-science sentiment.
- As trade agreements are violated and supply chains disrupted, Canada must stimulate investment in home-grown business, technologies and processes, as well as renew emphasis on Canada's bilateral and multilateral international relationships and market development.
- A key step along this path is investment in Canadian innovation and commercialization, ensuring that valuable Canadian-developed IP can draw on capital and scale up to commercial viability so our citizens can realize economic and health benefits.

By viewing the sector as an asset ripe for investment Canada can position itself as a global leader

- Importantly, areas such as regulation, data accessibility and patient inclusion should be approached as enablers of our success, not as cumbersome barriers to growth.

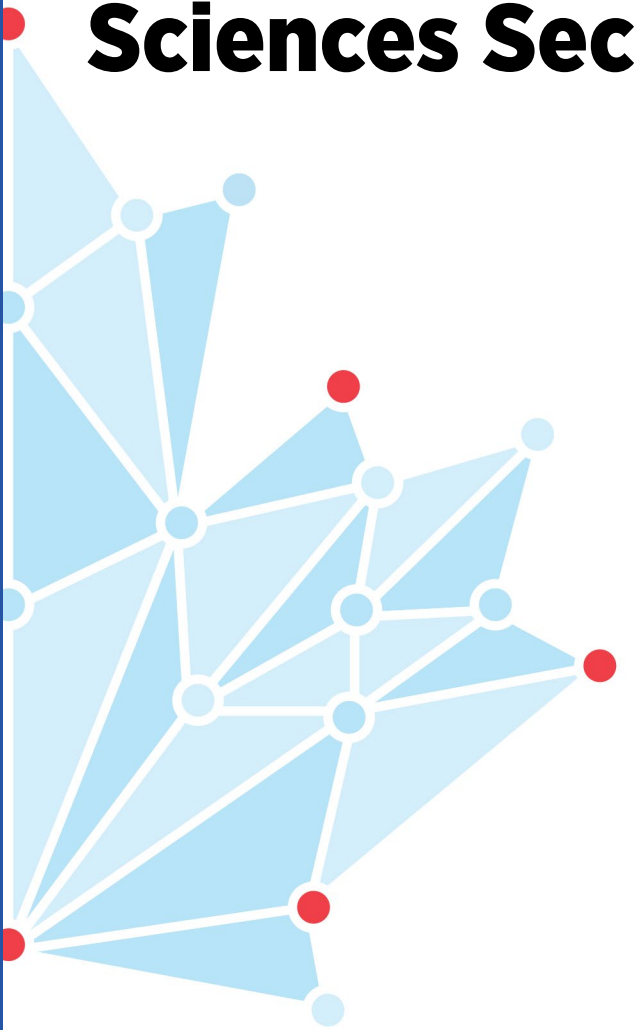
Excitingly, getting the response right to these new threats will not only underpin our health security, but also position Canada's life sciences sector as a cornerstone of economic growth.

To achieve this we must stop viewing life sciences as a cost centre, and begin to understand that investment in the sector delivers real economic returns – both through direct growth and job creation, and indirectly, by enabling healthy Canadians to participate in the economy to their full potential.

By viewing the sector as an asset ripe for investment – both financially and through advantageous policy-making – Canada can position itself as a global leader in health innovation, creating jobs, boosting productivity, improving health outcomes and bolstering national competitiveness.

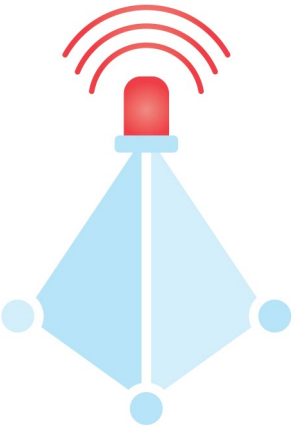
The following playbook lays out the case for urgent action in six areas where bold moves can deliver the changes required to ensure our health security and bolster our economic success.

A PLAYBOOK FOR A **Powerful Life Sciences Sector**



PLAY #1

Recognize Canada faces a national health security emergency



"We are a war cabinet, and we need to have a wartime philosophy," Canada's Industry Minister said recently in an interview about the need to cut red tape and speed up innovation programs. The sense of urgency that Ottawa first adopted around the pandemic and has now extended to economic growth must also include Canada's health security, where threats posed by new dynamics in international relations and trade – driven by U.S. policy agendas – have exposed vulnerabilities in Canada's life science supply chains and increased risks to public health.

Business cannot continue as usual. To quickly implement new innovative solutions, the federal government must trigger a fundamental change in the operation of its public service. In practice, this means Health Canada and ISED adopting new, more efficient approaches to regulation-making and investment attraction.

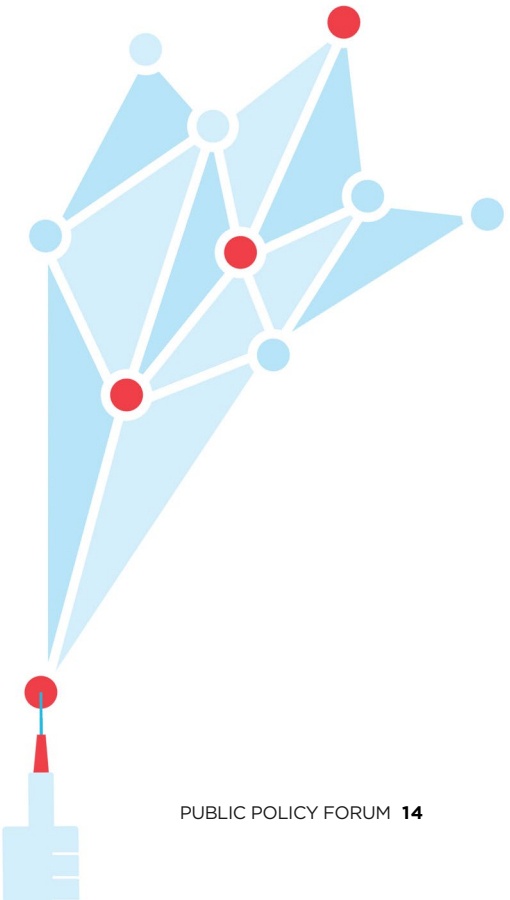
As it stands, decision-making for health regulations is encumbered by too many people in multiple levels of authority, often working with outdated IT systems and procedures – creating a slow and inefficient regulatory process. This highly uncompetitive regulatory status is costly to Canadians. It can take years for health regulations to be enacted or modified, if at all.

A new model is necessary, capable of enacting new regulations quickly and efficiently, with the alignment of provincial and territorial regulations at its core.

One approach could see low economic-impact regulations requiring approval only from the Minister of Health, eliminating the current cumbersome Treasury Board processes and reviews. For medium and higher economic-impact regulations, a new process must be designed, backed by investment in appropriate IT systems, with agility, productivity, cost and level of risk in mind. Shortened approval times should be comparable, and preferably even better, than other developed economies.

PLAY #2

Fast-track Health Emergency Readiness Canada (HERC)



The federal government created HERC in the fall of 2024 to support "the development and production of medical countermeasures, such as vaccines, therapeutics and diagnostics, to protect Canadians against health emergencies and contrib-

ute to global medical countermeasure readiness and response efforts."[1] It aims to do this by advancing high-risk research and leading-edge technology platforms, supporting sector growth, and facilitating pathways to market for new innovations.

HERC works across government departments and agencies, and is establishing relationships internationally with similar organizations such as the Biomedical Advanced Research and Development Authority (BARDA)[2] in the United States and the European Union's Health Emergency Preparedness and Response Authority (HERA).[3]

HERC's first few months sees it on track, establishing relationships in the federal and provincial governments as well as industry, researchers and academic institutions. Public Safety Canada and the Department of National Defence have joined as partners. Planning is underway to attract global investment while also expanding domestic manufacturing capacity for emergency preparedness.

It's a good start. But more needs to be done faster.

HERC must be fully operational, engaging with provinces, industry, researchers and international partners by the end of 2025.

Canada was the last G7 country to establish a national health security and emergency coordinating agency. It has a lot of catching up to do. Now, due to the change in U.S. policy, it has much less time than previously thought to do it. HERC needs to expedite its efforts to make Canada attractive for investment in life sciences. This will boost the national economy and make Canada more self-sufficient in its capacity to respond to the next health emergency.

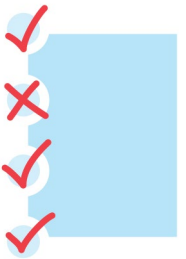
HERC must be funded at a comparable level to similar agencies in like-minded countries, and publish an investment plan by the end of 2025.

Additional funding is required if HERC is to meet its full potential in attracting global life sciences investment to Canada, supporting innovative research and commercialization of Canadian discoveries and technology for the global market. BARDA in the United States has an annual budget of just under $1 billion.[4] Its 2022-2026 Strategic Plan outlines how it uses that budget

to mobilize quickly in response to health emergencies, leveraging existing and new partnerships, and identifying proven technologies that can be adapted to emerging threats.[5]

To match the commitment of the United States, HERC requires an annual investment allocation of approximately $100 million from the federal government beyond the agency's operating costs. HERC must prepare its own strategic plan to justify this level of annual funding, focused on:

- filling gaps in Canada's life science manufacturing capabilities;
- identifying sub-sectoral areas of investment where Canada can build on existing capabilities and competitiveness, such as AI in personalized healthcare, genomics, drug development and diagnostics;
- the development of more anchor companies in Canada.



PLAY #3

Create a Canadian life sciences performance scorecard

You can't improve what you don't measure. Canada must develop a scorecard and set ambitious targets to improve the contribution of the life science sector to economic growth and health security. Such a scorecard would be a valuable tool in Canada's efforts to attract foreign investment, while highlighting its growing global status in the sector.

A new panel consisting of representatives of the public sector, the life sciences industry and patients should be established within HERC to confirm target areas, goals and base-levels, reporting annually to Canadians on progress made. Initial metrics could include:

1 R&D INVESTMENT AND FUNDING

- **R&D expenditure as a percentage of GDP:** The intensity of national investment in research and development relative to the overall economy.
- **Public sector investment in life sciences:** Total spending by all governments in Canada on life sciences, including biomedical research, public health initiatives, and innovation funds.
- **Venture capital funding:** Amount of venture capital (VC) raised by life sciences startups and scale-ups.

2 NUMBER OF LIFE SCIENCES COMPANIES

- **Total number of biotech and pharma companies:** Number of biotech, pharmaceutical, and medical device companies operating in the country, along with the proportion that are start-up, small, medium and large.
- **Top 100 global pharma companies headquartered:** Number of large, globally influential pharmaceutical companies headquartered in Canada.

3 WORKFORCE AND TALENT POOL

- **Number of employees in life sciences:** Total number of workers employed in the research and production elements of the life sciences sector.
- **Graduates in STEM (science, technology, engineering, mathematics):** Number of annual graduates in relevant STEM fields,

including biotechnology, bioengineering, and related disciplines.

- **Attractiveness to foreign talent (work visas, salaries):** Number of skilled immigrants in the life sciences sector and the availability of related work visas.

4 INNOVATION AND RESEARCH OUTPUT

- **Number of patents filed in life sciences:** Total number of patents related to life sciences filed annually.
- **Number of clinical trials:** Total number of ongoing or completed clinical trials, particularly in drug development and medical devices.
- **Scientific publications in life sciences:** Number of peer-reviewed publications in leading life sciences journals.
- **Biotech innovation index:** The country's overall biotech innovation capacity versus G7 nations, including research output, commercial viability, and intellectual property generation.

5 MANUFACTURING AND INFRASTRUCTURE CAPACITY

- **Number of biomanufacturing facilities.** Number of facilities capable of producing biologics, vaccines and other pharmaceuticals.
- **Pharmaceutical exports:** Total value of pharmaceuticals and biologics exported annually.

6 ECONOMIC CONTRIBUTION

- **Life sciences sector's contribution to GDP:** Percentage of national GDP attributed to the life sciences sector, including biotech, pharmaceuticals, and health care technology.
- **Total revenue from the life sciences sector:** Total revenue generated by life sciences companies.

7 PUBLIC HEALTH OUTCOMES AND ADOPTION OF INNOVATION

- **Time to get products to market:** Total cost and time taken for biotech and pharmaceutical companies to bring a drug to market.
- **Access to innovative therapies:** Time taken for new therapies to be made available to the public after regulatory approval.
- **Health technology adoption rate (e.g., AI, digital health):** Percentage of health care providers and systems reporting use of advanced health technologies like AI, telemedicine, and digital health platforms.

PLAY #4

Develop a national life science talent recruitment strategy

The upheaval in the United States has led to talented researchers actively seeking relocation opportunities. This creates an excellent opportunity for Canada to grow its life sciences capabilities by recruiting both top and emerging talent, all of whom would bring with them their own networks, research and data sets — creating a significant multiplier effect for the

If a researcher wants to relocate to Canada, why can't approvals for permanent residence be done in weeks?

sector. Canada must be proactive in attracting these individuals and provide a soft landing to accommodate them once they arrive.

Acting with an emergency mindset, Canada must take action to attract recognized and emerging talent to settle here, raising Canada's global profile, research success and commercialization in life sciences.

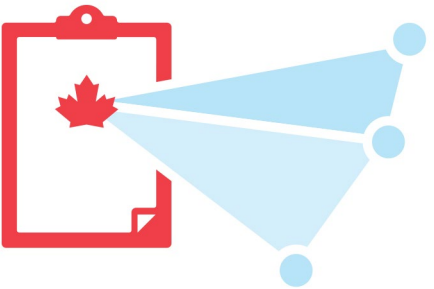
HERC should coordinate the production and implementation of a talent-recruitment plan to attract those with the skills and expertise that would benefit our life sciences sector.
A federal-provincial-territorial group working under HERC's direction must survey industry, domestic researchers, granting councils and academic institutions to develop a consensus on the skills and research experience that would be most beneficial for the growth of the sector. They must then coordinate a recruitment and growth strategy to attract the talent needed.

The federal government must work with the provinces to designate, implement and publicize a fast-track immigration/employment process for identified talent from the United States and other countries.
An emergency requires a co-operative and coordinated approach to attract life sciences talent to Canada from other countries, while not devolving into inter-provincial competition.

If a researcher based in the United States or elsewhere wants to relocate in Canada, why can't approvals for permanent residence and family status be done in weeks? Concurrently, why cannot granting councils and academic institutions coordinate to provide the funding needed to ensure Canada is ready to accommodate and provide a soft landing for new talent?

PLAY #5

Adopt a "made in Canada" approach to life science investment and procurement



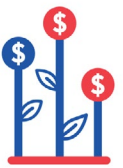
Canadian researchers have achieved notable successes across many fields in life sciences. These include vaccine development and approvals, regenerative medicine, genomics, cancer immunotherapy, cell and gene therapies and radiopharmaceuticals. A recent report by RBC Economics notes: "Canada's life sciences sector has been a paragon of strength and economic vibrancy," but "its stature risks eroding in the face of increasing global competition for investment and talent." It proposes that "to make scaling innovation easier and keep more locally developed intellectual property (IP) in the country, Canada needs better commercialization support in the form of favourable policies and more accessible and coordinated resources and funding."[6]

A particular international strength has emerged in developing personalized medicine. Examples include Blue Rock Therapeutics[7] and its work on cardio and neural regenerative research on Parkinson's disease; Aspect Biosystems,[8] working on 3D printing of bio-tissues for diabetes treatment; and Satellos Bioscience's[9] stem-cell approach to treating muscular dystrophy through

regenerating muscle using small molecule therapeutics.

To date, Canadian success has too often gone only so far before it becomes the same old story: Canadian startups are funded domestically, with resulting success in research, products and innovations, only to be bought out by American or European multinationals, and Canadian discoveries undergoing clinical trials outside our border. When successful, too frequently regulatory approval comes first from the Federal Drug Administration in the United States before public use can occur in Canada.

Canadians fund the primary research, but patients in other countries are the initial beneficiaries of our discoveries. That should not be the norm



Canadians fund the primary research, but patients in other countries are the initial beneficiaries of our discoveries. That should not be the norm. Federal and provincial governments should quickly develop and implement a made-in-Canada pathway to commercialization for domestic discoveries in those subsectors where Canada has a competitive advantage. This plan should include working with academic institutions, providing venture capital support, prioritizing dedicated human resources training and hiring, preferential regulatory review and approvals, accelerating clinical trials, committing to provincial purchasing for hospitals, and end-use by physicians for patients.

The regulatory process must be modified to favour products that

are developed from Canadian-based research and manufactured in Canada. The current Canadian regulatory model must do more to prioritize Canadian interests. A pharmaceutical product manufactured in the United States with inputs from China and India receives the same regulatory priority as a product emerging from Canadian research and made in Canada. Appropriate protections must be in place to ensure Canadians continue to have access to novel treatments or therapies developed elsewhere.

To help with capacity issues, Health Canada should more frequently rely on mutual recognition and reliance, using decisions from other trusted regulators and accept their decisions for non-Canadian made products. This will free up substantial resources that can be dedicated to assisting Canadian companies getting their Canadian-made products to Canadian citizens.

The ultimate goal is a more streamlined and predictable regulatory approval timeline. This would both bolster development in Canada, and significantly enhance Canada's attractiveness to foreign investors committed to developing their discoveries in Canada, or bringing them to market here initially.

Institutionalize common provincial health policies, regulations and procurement processes and standards, prioritizing the purchase and adoption of Canadian-made life sciences products by the Canadian health care system. Canada's health care system is too slow in accepting and integrating new innovations. Foreign companies trying to supply Canada with pharmaceuticals and health products during the COVID pandemic had a common complaint. Rather than one large market of 40 million people, Canada presented as many separate provincial markets with differing rules, regulations and procurement practices in each. Global suppliers were therefore reluctant to deal with Canada when there were other larger markets more readily available. At the same time, this limited the bargaining power of provinces to negotiate the best price.

Now is the time to end that longtime constraint. Standardizing Canadian

health policies, regulations and procurement procedures has benefits for both manufacturers and patients. It helps promote investment, as domestic manufacturers can get products to the market quickly, demonstrating success that can encourage international sales. For patients, it means being first in the world to benefit from pharmaceuticals and technologies developed in Canada with support from Canadian funding. It also generates global demand for what Canadian companies have to offer.

The provinces are the drivers of the health marketplace in Canada. They determine what will be purchased, not just through hospitals but through benefit plans for seniors and lower-income Canadians. It is time for provinces to eliminate their differences in policies, regulations and procurement processes to create a single health care marketplace in Canada.

It is time for provinces to eliminate their differences in policies, regulations and procurement processes to create a single health care marketplace in Canada

Matching the changes to regulatory approvals, the provinces must prioritize the purchase and adoption of Canadian-made products within the entire health care system. Those products should receive priority in early regulatory negotiations.

As an adoption incentive, the federal government should establish a fund for provinces and territories to cover a meaningful percentage of the cost

of Canadian-manufactured drugs and devices developed by Canadian-funded research. Large Canadian hospitals should also develop targets for purchasing Canadian-made products, to ensure they are first adopters worldwide and can encourage other global purchasers. Canadian hospitals, and thus Canadian citizens, should be systemically the first users of Canadian manufactured products.

Develop a revenue stream for HERC to invest in expanding Canadian life sciences capabilities.

Establishing HERC as a special operating agency within ISED creates an opportunity to develop a revenue stream that can invest in advancing all aspects of life sciences in Canada.

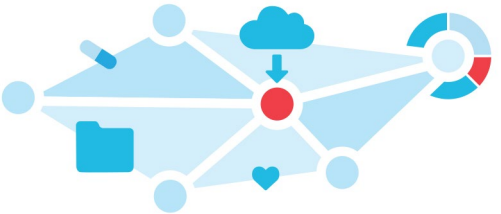
Companies that sell pharmaceutical and medical devices in Canada pay Health Canada an annual "right to sell" fee. This offsets Health Canada's costs in activities such as inspecting manufacturing plants to ensure product safety. The federal government should introduce an additional levy on non-Canadian manufacturers, reflecting the higher costs of working with foreign companies – with safeguards in place to ensure it isn't simply passed on to consumers. Additional revenue should be given to HERC to invest in expanding Canada's life sciences sector, with an annual detailed public report of HERC's income and investments produced to track its success in expanding Canadian life sciences capabilities.

Co-develop models for leveraging government investment to unlock private capital

For the sector to reach its full potential, greater private capital needs to be mobilized alongside increased public sector funding. One option for de-risking private investment is to pair it with public investment, providing greater certainty for fund managers and investors. To this end, managers of Canadian VC funds, pension funds and other investors should be engaged by federal government and other partners to co-design new models for unlocking private capital in Canada. For example, in the U.K., a $360-million, government-backed Life Sciences Investment Programme aimed at addressing the growth equity finance gap hopes to unlock a further $720 million of additional private financing.

PLAY #6

Unlock our health data as an asset for Canada



Europe views data as an asset, while Canada views data as privacy. As a result, the EU is miles ahead of Canada in the collection and use of data in all aspects of health care, health security and emergency preparedness and response. For instance, why is it that the *Globe and Mail* could only obtain data on the number of Canadians receiving flu shots in the winter of 2024–25 from some, not all provinces and territories, for a story on flu vaccination rates?[10]

Standardize the collection and sharing of health data

Collection and sharing of data must be standardized to ensure quality, availability and interoperability. Now is the time to do it, capitalizing on current enthusiasm for dropping interprovincial trade barriers.

This will take both investment and a change in mindset. Currently there are too many groups involved in decisions about data collection, privacy and distribution: physicians, patients, health care institutions and bureaucracies. Sometimes those involved simply don't want to share information, and sometimes it can't be shared easily, for example when data belongs to a province that must first agree to share. Then there's the challenge of interoperability: significant amounts of health data remain undigitized due to a lack of common computer systems and formats across the country. Establishing standards should include anonymizing but disaggregating data, so that treatment can be personalized by segment. There also has to be patient trust and full transparency regarding how data will be used.

Finally, privacy concerns often get raised by default when discussing use of health data, even though the barriers aren't as severe as some interpret them to be in existing legislation. Moreover, the ability to take data from multiple systems, anonymize it and make it useful in a clinical or statistical context is easy to do, and should overcome any lingering concerns.

With barriers to sharing removed, data should be made available for preferential use by Canadian-based businesses

Make Canadian health data available for preferential use by Canadian-based researchers

Canada's diverse population makes its health data highly desirable for researchers and drug developers. With barriers to sharing removed, this data should be made available for preferential use by Canadian-based businesses and researchers, providing them with a major competitive advantage in the commercialization of their successes. It would provide further impetus for those looking to implement AI-led approaches across health care and drug development. It would enable Canada to quickly pinpoint shortages of products, and highlight increased costs within the system.

Build our data storage capacity

While unlocking its data, Canada should build its data-storage infrastructure, mitigating the risk of having storage managed by non-Canadian entities. Expanded data-storage capacity could provide a soft landing for international researchers and academics considering Canada, providing the ability for them to house their own data-led research.

Educate the public and politicians on health data

Finally, politicians and the public need to understand what is possible if Canada views anonymized health data as an asset that can be unlocked: boosting national security and competitiveness, placing Canada at the center of a new data-led health revolution.

Conclusion

The challenge of this pivotal moment in Canadian history underscores the urgency of rethinking traditional approaches to the life sciences sector and health security. Canada must prioritize resilience, innovation, and self-reliance.

This report's recommendations provide practical steps to address current vulnerabilities. By streamlining regulatory processes, unlocking data as an asset, investing in talent development and enhancing biomanufacturing capacity, Canada can position itself as a leader in life sciences innovation while ensuring health security for future generations.

The newly elected federal government has an unparalleled opportunity to redefine Canada's life sciences landscape by embracing urgency, dismantling bureaucratic barriers and fostering a culture of innovation. Doing so, will transform Canada's life sciences sector into a cornerstone of national strength — one that protects its citizens' health while contributing to economic prosperity, ensuring healthy Canadians within a competitive nation.

The path forward requires ambition, collaboration, and commitment to change. With the right strategies and investments, Canada can meet today's historic challenge and emerge more resilient and better prepared for the uncertainties of tomorrow.

Endnotes

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Acknowledgements

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This is the third Public Policy Forum report on Canada's life sciences sector, and produced in alignment with PPF's Mission Canada, creating a blueprint for coordinated action to leverage our economic advantage for a prosperous Canada. Our first report set Canada on a path to better prepare for the next pandemic, which led to the creation of Health Emergency Readiness Canada (HERC). The second report addressed the need to better develop and manage supply chains that will give Canada the resources to respond to future health emergencies. This report follows those building blocks in the ongoing process of supporting healthy Canadians and bolstering a competitive Canada.

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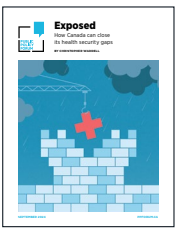

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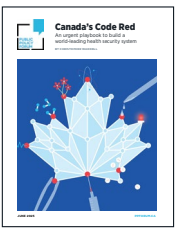

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