

THE MAGAZINE OF THE MACDONALD-LAURIER INSTITUTE

# INSIDE POLICY

Volume 1, 2024



## TRUE NORTH STRONG?

Chronic neglect  
has pushed Canada's  
military into a crisis.

by J.L. Granatstein

### Also INSIDE:

Indigenous support  
crucial for  
mining success

Should we  
electrify  
everything?

Solving  
Canada's  
housing crisis

Don't rush  
Palestinian  
statehood





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ISSN 1929-9095 (print) 1929-9109 (online)

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# From the editors

“**R**ely not on the likelihood of the enemy’s not coming, but on our own readiness to receive him.” Sun Tzu’s advice rings as true today as it did when the Chinese military strategist wrote *The Art of War* around the fifth century BC.

In a perfect world, a desire for peace is enough. But an imperfect world demands preparation for the worst. Unfortunately, when it comes to Canada’s military, we’re simply not ready for *anything*, says the author of this issue’s cover story.

In “True North Strong?” historian **J.L. Granatstein** argues that chronic underfunding, recruiting woes, and an unnecessarily woke “culture change” have left Canada’s military unprepared to meet the threats of an increasingly dangerous world.

Elsewhere in this issue, **Karen Ogen-Toews** says that a proposed ban on oil and gas promotion must be examined through the lens of paternalistic treatment of Indigenous peoples, and **Chris Sankey** explains why alignment with Indigenous communities is crucial for completing new energy projects.

Meanwhile, controversy continues to surround efforts to expand medically assisted death in Canada. **Ramona Coelho** argues that it is highly irresponsible for government to consider further MAiD expansion while refusing to tackle the persistent barriers to care faced by vulnerable populations.

Several of our contributors explore issues surrounding natural resources and the energy transition. **David Polansky** urges Canada not to reject its legacy of abundant natural resources. **Tayler Amatto** explains why “electrifying everything” simply won’t work for many industries. And **Joseph Bouchard** explains how Canada’s mining sector desperately needs domestic and allied capital, adding that our economic future hangs in the balance. Certainly, the transition to sustainable energy needs to happen – but not at the expense of undermining Canada’s economy.

Closer to “home,” many Canadians continue to struggle amid the ongoing housing crisis. It sometimes seems like policymakers want to have it all – unbridled population growth, housing supply constraints, and housing affordability. But contributors **Josef Filipowicz** and **Steve Lafleur** argue that this “trilemma” is impossible to sustain. In the end, something must give.

Turning to Foreign Affairs, **Casey Babb** argues that now is not the time to push for Palestinian statehood, while **J. Michael Cole** explains how failing to support Taiwan against Chinese aggression could spark a rise in authoritarianism around the globe. And finally, **Balkan Devlen** and **Jonathan Berkshire Miller** challenge conventional approaches to international cooperation. Can Canada lead the way in re-envisioning our global role?

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# Proposed ban on oil and gas promotion revives paternalistic treatment of Indigenous peoples

*MP should withdraw his offensive attempt to silence discussion.*

## Karen Ogen-Toews

First Nations people are used to oppression. We lived for over a century with the heavy hand of the Department of Indian Affairs. We coped with corrupt and even mean Indian agents. The Canadian government told us where to live and how to learn. It tried to destroy our language and culture and undermined our traditional economies.

We are sick and tired of being told what to do and think. We can do these things

for ourselves. But First Nations know that paternalism is far from dead in Canada.

In February 2024, NDP MP Charlie Angus introduced a private member's bill that seeks to ban promotion of the oil and gas industry. Angus's bill suggests that he wants to bring back the oppressive hand of the state in a manner consistent with dictatorships and authoritarian states. The MP for Timmins-James Bay and his party want to shut down fossil fuel production, a move that would devastate the Canadian economy and undermine the greatest – and often

the only – opportunity that many First Nations have for economic renewal.

Even that is not enough. He wants to shut us up – telling us what to think and threatening us with jail and fines for not adhering to his strange, unrealistic, and dangerous views of energy and environmental protection.

I am a proud spokesperson for First Nations engagement with the liquid natural gas (LNG) sector. My First Nation, the Wet'suwet'en, has been on the front lines of the national debate about LNG and pipeline construction.





coastalgaslink.com

“ *Our communities discuss energy and infrastructure issues all the time, and we are comfortable with the decisions we have made.* ”

We have lived for years with the national media misrepresenting and distorting our community’s views on the Coast GasLink Pipeline, a major resource project in British Columbia that now has significant First Nations ownership. This project has overwhelming support in my First Nation – but that’s not the impression one would get from the media coverage of the environmentalists’ interventions in community affairs.

Coastal GasLink has already brought well-paid jobs, business opportunities, and new financial resources to our people and it will do so for decades to come.

We have monitored the project closely and continue to work with the pipeline company to ensure the environment is protected and our interests respected.

At the First Nations LNG Alliance, we spent years exploring the global environmental impact of liquified natural gas. We know that Canadian LNG, produced to the highest international environmental standards, will allow Asian countries to cut back sharply on coal usage, a process that has greater ecological benefits than many of the more symbolic steps being taken in Canada and other countries.

It is tragic that Canadian discussions about energy and climate change have

been reduced to trite phrases, simple concepts, and now the unleashing of the authoritarian impulses that remain in the country.

I am confident that many First Nations have spent more time exploring and debating energy production and use than most non-Indigenous Canadian communities. Finding the balance between economic development, local environmental and cultural protection, and ecological sustainability is hard work. Our communities discuss energy and infrastructure issues all the time, and we are comfortable with the decisions we have made.

But now, Angus – a long-serving member of Parliament – wants to shut me up. He wants to fine me or put me in jail for doing my job – which includes sharing First Nations perspectives on fossil fuels. He wants to ban public discussion of the benefits of oil and gas and has clearly bought into the idea that fossil fuels should be eliminated.

We have no idea about the future that Angus and others have in mind. Perhaps he envisages a country with homes heated by good will, transportation restricted to foot and bicycle, food transported by pack dogs, car-free roads paved only with good

intentions, and government budgets funded by best wishes.

Many odd and unexpected things come out of the House of Commons, but nothing in recent years is as upsetting and disgraceful as Angus’s private member’s bill, C-372.

So, I say this: Mr. Angus, you have gone much too far. Your private member’s bill is the most ridiculous, paternalistic, and reprehensible example of oppression directed at First Nations people in decades. I hope you are embarrassed by your ideological over-reach, and I hope you have the decency to withdraw your bill and apologize.

You insulted Canadians and offended the hundreds of Indigenous communities and thousands of First Nations people actively engaged in the oil and gas sector.

We will not be quiet as we chart the future we want, on our terms and in our territories. Far from silencing us, you have made it abundantly clear that Indigenous peoples must speak for ourselves. Most importantly, we will fight to protect ourselves from the old-style paternalism that lurks way too close to the surface in Canadian public affairs. ❁

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Karen Ogen-Toews is the CEO of the First Nations LNG Alliance.

# Alignment with Indigenous communities is the answer to completing energy projects

*Proposed Floating LNG terminal in Northern BC is an example of how to get energy projects right.*



Naralia Lagurkina via iStock

## Chris Sankey

Alignment between Indigenous communities reduces the risks of investing in natural resource and energy projects; investment, in turn, brings much-desired prosperity to those same Indigenous communities.

Alignment means a nation-to-nation leadership relationship, forged without outside interference. It involves hereditary and elected bodies working together to strengthen their relationships with neighbouring First Nations. The goal is to work together as one voice for the common good of their respective communities.

“  
Well-constructed  
bridges build  
durable  
relationships.”

Alignment between First Nations and industry is also essential. I have spent the better part of my career working to bring communities and industry together. Well-constructed bridges build

durable relationships. Business is about relationships that foster trust, context, purpose, and a clear vision.

We spend a lot of time talking about how things go wrong in Indigenous Affairs in Canada: it is important to share success stories too – stories of clear alignment and trust between Indigenous communities and industry that yield benefits for all parties. This is why I am happy to write about an energy project that is changing the way First Nations in northern British Columbia move forward together.

Above: Artist rendering of berths at an LNG floating terminal, with two gas carriers.





The Granby Group has been working on an energy project located at Anyox, BC, (an abandoned mining town across from Kitsault, north of Prince Rupert). The owners at Granby bought Anyox several years ago. The site is about 810 hectares of virtually flat private land in the traditional territory of Lax Kw'alaams (of which, full disclosure, I am a member and former elected councillor) and Metlakatla First Nation. The proposed Granby Floating LNG Terminal could be the solution that drives our local economy for decades to come.

The Granby Group has been working hard to make this project public for investment purposes and they understand the need to partner with the Metlakatla and Lax Kw'alaams First Nations if they are to find success. Granby has even indicated that it will include a project name brought forward by the impacted Indigenous communities. (The leadership of those two communities will also forge relationships with neighbouring nations to promote shared opportunities and to respect cultural protocols of those nations.

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*Indigenous communities are central to resource development and will likely define the future of energy development around the world.*”

It is important to build a consensus in communities across coastal BC; it is critical to have meaningful participation from all the Indigenous communities that depend on the coast for their livelihoods and cultural resilience.)

Few would dispute that the greatest challenge for Canadian resource development projects has been obtaining Indigenous support and addressing environmental opposition to pipelines.

This project has avoided both of these errors. Granby is working to align industry needs and expectations with the interests of the First Nations that hold title to unceded lands, while simultaneously ensuring that the proposed energy project is commercially viable and benefits the affected communities.

Commercial success will yield social dividends as our communities build capacity to advocate for ourselves and for future generations. The days when industry proponents need only inform communities about proposed projects are long gone. Industry must engage with our communities to strengthen our capacity, infrastructure, health, education, arts, and culture. Granby understands this.

The involvement of Indigenous communities should also seriously mitigate any environmental concerns. Who better to have at the table than the people who travelled these waters and lands for the last 10,000 years? Our communities have always relied on the land and water for sustenance and our involvement in the project sets the foundation for strong environmental project performance. It is critical to ensure that traditional values and land uses are respected throughout the planning and development process. These guidelines will help develop a robust stewardship plan for the operation of the facility over the long-term.

Indigenous communities are central to resource development and will likely define the future of energy development around the world. The Granby Group made the right – and smart – decision to ensure the impacted Indigenous communities are at the table. It will benefit Indigenous communities across the country and the nation as a whole if others follow their example. ✨

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*Chris Sankey is a Senior Fellow at MacDonald Laurier Institute, and an advisor to Indigenous and industry leaders. Sankey is a member and former elected councillor of Lax Kw'alaams First Nation.*

*Canada's military is in crisis – and it's only growing worse.*

# TRUE NORTH STRONG?

By J.L. Granatstein



(Captain Joffrey Provender via flickr.com/photos/cfoombatcamera)

Nations have interests – national interests – that lay out their ultimate priorities. The first one for every country is to protect its population and territory. It is sometimes hard to tell, but this also applies to Canada. Ottawa's primary job is to make sure that Canada and Canadians are safe. And Canada also has a second priority: to work with our allies to protect their and our freedom. As we share this continent with the United States, this means that we must pay close attention to our neighbouring superpower.

Regrettably for the last six decades or so we have not done this very well.

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During the 1950s, the Liberal government of Louis St. Laurent in some years spent more than 7 percent of GDP on

defence, making Canada the most militarily credible of the middle powers. His successors, however, whittled down defence spending and cut the numbers of troops, ships, and aircraft. By the end of the Cold War, in the early 1990s, our forces had shrunk, and their equipment was increasingly obsolescent.

Another Liberal prime minister, Jean Chrétien, balanced the budget in 1998 by slashing the military even more, and

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Canadian Armed Forces members during Exercise Iron Spear 2023 II at Camp Ādaži, Latvia, in November 2023.



by getting rid of most of the procurement experts at the Department of National Defence, he gave us many of the problems the Canadian Armed Forces face today.

Canadians and their governments wanted social security measures, not troops with tanks, and they got their wish.

There was another factor of significant importance, though it is one usually forgotten. Lester Pearson's Nobel Peace Prize for helping to freeze the Suez Crisis of 1956 convinced Canadians that they were natural-born peacekeepers. Give a soldier a blue beret and an unloaded rifle and he could be the representative of Canada as the moral superpower we wanted to be. The Yanks fought wars, but Canada kept the peace, or so we believed, and Canada for decades had servicemen and women in every peacekeeping operation.

There were problems with this. First, peacekeeping didn't really work that well. It might contain a conflict, but it rarely resolved one – unless the parties to the dispute wanted peace. In Cyprus, for example, where Canadians served for three decades, neither the Greek- or Turkish-Cypriots wanted peace; nor did their backers in Athens and Ankara. The Cold War's end also unleashed ethnic nationalisms, and Yugoslavia, for one, fractured into conflicts between Serbs, Croats, Bosnians, Christians, and Muslims, leading to all-out war.

Peacekeepers tried to hold the lid on, but it took NATO to bash heads to bring a truce if not peace.

And there was a particular Canadian problem with peacekeeping. If all that was needed was a stock of blue berets and small arms, our governments asked, why spend vast sums on the military? Peacekeeping was cheap, and this belief sped up the budget cuts.

Even worse, the public believed the hype and began to resist the idea that the Canadian Armed Forces should do anything else. For instance, the Chrétien government took Canada into Afghanistan in

2001 to participate in what became a war to dislodge the Taliban, but huge numbers of Canadians believed that this was really only peacekeeping with a few hiccups.

Stephen Harper's Conservative government nonetheless gave the CAF the equipment it needed to fight in Afghanistan, and the troops did well. But the casualties increased as the fighting went on, and Harper pulled Canada out of the conflict well before the Taliban seized power again in 2021.



A Canadian peacekeeper surveys the landscape during a UN mission in Cyprus circa 1960s.

Harper's successor, Liberal Prime Minister Justin Trudeau, clearly has no interest in the military except as a somewhat rogue element that needs to be tamed, made comfortable for its members, and to act as a social laboratory with quotas for visible minorities and women.

Is this an exaggeration? This was Trudeau's mandate letter to his defence minister in December 2021: "Your immediate priority is to take concrete steps to build an inclusive and diverse Defence Team, characterized by a healthy workplace free from harassment, discrimination, sexual misconduct, and violence."

DND quickly permitted facial piercings, coloured nail polish, beards, long hair, and, literally, male soldiers in skirts,

so long as the hem fell below the knees. This was followed by almost an entire issue of the CAF's official publication, *Canadian Military Journal*, devoted to culture change in the most extreme terms. You can't make this stuff up.

Thus, our present crisis: a military short some 15,000 men and women, with none of the quotas near being met. A defence minister who tells a conference the CAF is in a "death spiral" because of its inability to recruit soldiers. (Somehow no

one in Ottawa connects the culture change foolishness to a lack of recruits.) Fighter pilots, specialized sailors, and senior NCOs, their morale broken, taking early retirement. Obsolete equipment because of procurement failures and decade-long delays. Escalating costs for ships, aircraft, and trucks because every order requires that domestic firms get their cut, no matter if that hikes prices even higher. The failure to meet a NATO accord, agreed to by Canada, that defence spending be at least 2 percent of GDP, and no prospect that Canada will ever meet this threshold.

But something has changed.

Three opinion polls at the beginning of March all reported similar results: the Canadian public – worried about Russia



MCpl Yves Proteau; Aviator Gregory Cole

Left: Canadians deployed to Afghanistan in 2012. Right: Canadian Armed Forces participating in Indo-Pacific Deployment 2023.

and Putin's war against Ukraine, and anxious about China, North Korea, and Iran (all countries with undemocratic regimes and, Iran temporarily excepted, nuclear weapons) – has noticed at last that Canada is unarmed and undefended. Canadians are watching with concern as Ottawa is scorned by its allies in NATO, Washington, and the Five Eyes intelligence sharing alliance.

At the same time, official Department of National Defence documents laid out the alarming deficiencies in the CAF's readiness: too few soldiers ready to respond to crises and not enough equipment that is in working order for those that are ready.

The bottom line? Canadians finally seem willing to accept more spending on defence.

The media have been hammering at the government's shortcomings. So have retired generals. General Rick Hillier, the former chief of the defence staff, was especially blunt: "[The CAF's] equipment has been relegated to sort-of-broken equipment parked by the fence. Our fighting ships are on limitations to the speed that they can sail or the waves that they can sail in. Our aircraft, until they're replaced, they're old and sort of not in that kind of fight anymore. And so, I feel sorry for the men and women who are serving there right now."

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The Trudeau government has repeatedly demonstrated that it simply does not care. It offers more money for the CBC and for seniors' dental care, pharmaceuticals, and other vote-winning objectives, but nothing for defence (where DND's allocations astonishingly have been cut by some \$1 billion this year and at least the next two years). There is no hope for change from the Liberals, their pacifistic NDP partners, or from the Bloc Québécois.

The Conservative Party, well ahead in the polls, looks to be in position to form the next government. What will the Conservatives do for the military?

So far, we don't know – Pierre Poilievre has been remarkably coy. The Conservative leader says he wants to cut wasteful spending and eliminate foreign aid to dictato-

rial regimes and corrupted UN agencies like UNRWA. He says he will slash the bureaucracy and reform the procurement shambles in Ottawa, and he will “work towards” spending on the CAF to bring us to the equivalent of 2 percent of GDP. His staff say that Poilievre is not skeptical about the idea of collective security and NATO; rather, he is committed to balancing the books.

What this all means is clear enough. No one should expect that a Conservative government will move quickly to spend much more on defence than the Grits. A promise to “work towards” 2 percent is not enough, and certainly not if former US President Donald Trump ends up in the White House again. Must we wait for Trump to attack free trade between Canada and the US before our politicians get the message that defence matters to Washington? Unfortunately, it seems so, and Canadians will not be able to say that they weren't warned.

After all, it should be obvious that it is in our national interest to protect ourselves. ❁

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J.L. Granatstein taught Canadian history, was Director and CEO of the Canadian War Museum, and writes on military and political history. His most recent book is *Canada's Army: Waging War and Keeping the Peace*. (3rd edition).



# Now isn't the time to push for Palestinian statehood

*Forcing a two-state solution upon Israel and the Palestinian territories will only lead to more conflict.*

## Casey Babb

Over the last four months, as Israel has waged a devastating war against Hamas in the Gaza Strip, politicians, scholars, and observers from around the world have debated the future of a post-war Middle East.

As is often the case – and understandably so – the majority of these discussions, proposals, and pleas revolve around the idea of a “two-state solution”: Jewish and Palestinian states living side by side, in peace. In fact, when it comes to solving the Israeli-Palestinian conflict, this has been the favoured solution of most for many decades.

However, over the last number of years, the idea of a two-state solution has been gradually losing support in Israel and the Palestinian territories; after the heinous terrorist attacks Hamas carried out on October 7 – which included the rape, murder, torture, and kidnapping of civilians – the prospects of achieving this goal seem more like a pipe dream than a viable political solution.

Yet, for US President Joe Biden and a handful of Arab partners, now appears as good a time as any to forcefully push, without Israel's backing, for Palestinian statehood and a two-state solution. For a variety of reasons, this is both reckless and naive.

At first glance, formally recognizing an independent Palestinian state might seem like the right move. For starters, having another Arab nation coexisting next to a Jewish one is the last thing Hamas would want (the Sunni terrorist group is



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The downsides to pushing for Palestinian statehood and a two-solution in the middle of a war are significant.”

vehemently opposed to Israel's existence). So, from that perspective, a two-state solution could deal a significant political and ideological blow to Hamas while it is already scrambling to survive.

Moreover, it could be seen by some as a legitimate pathway to ending this war,

while simultaneously ushering in a new era of peace and security for both Israelis and Palestinians alike. It has also been reported that recognition of an independent and sovereign Palestinian state would be tied to a US defence pact with Saudi Arabia and the establishment of diplomatic relations between Riyadh and Jerusalem – positive developments that could potentially change the region for the better.

However, the downsides to pushing for Palestinian statehood and a two-solution in the middle of a war are significant, and the obstacles virtually insurmountable. As former US special envoy for Israeli-Palestinian negotiations Frank Lowenstein recently remarked, getting these things done is “like you're trying to complete a Rubik's Cube while running 100 miles an hour and sinking in quicksand.”

Ultimately, there are several key steps that must be taken before recognizing an independent Palestinian state and working towards a two-state solution.

The most important is deradicalizing Palestinians living in Gaza and the West Bank. Without this, any future Palestinian state will look the same as the one that led to October 7. This process will take at least several decades, and require the overhaul of the Palestinian school curriculum, which currently teaches Palestinian children to hate and kill Jews. It will also mean enforcing a zero-tolerance policy – in mosques, in government departments and agencies, on social media, and elsewhere – on the use of language that incites violence against Israelis.

over a month after the October 7 attacks, a poll conducted by a reputable West Bank polling firm asked Palestinians living in both Gaza and the West Bank whether they favoured a two-state solution or a “Palestinian state from the river to the sea.”

Nearly 75 percent of respondents chose the latter.

With that in mind, it would be foolhardy for the Biden Administration or any other government – including Canada’s – to try to force something on a people that they themselves do not want and have no interest in.

Likewise, polls carried out prior to October 7 found that positive views of a two-state solution among Israelis was gradually fading. For instance, one poll conducted by

continues along the same path, then the US and other countries risk creating and empowering another Middle Eastern nation devoid of human rights and the rule of law.

Indeed, it’s important to note that Hamas’s popularity among Palestinians has risen since October 7. Should the terrorist group be allowed to govern a new Palestinian state? Will the new state become a vassal of Iran? What good is a two-state solution if a newly independent Palestinian state continued to wage war against Israel? These are just some of the crucial questions to consider and address.

US Secretary of State Anthony Blinken recently said that a “concrete, time-bound, and irreversible path” to a Palestinian state is the best way to address ongoing hostilities



*If Israelis and Palestinians are ever going to coexist peacefully alongside each other, the dust of this war must settle, and the wounds of grief and fear must begin to heal.*

Fundamentally – and at the very heart of the conflict – it will also mean teaching Palestinians that Israel isn’t going anywhere: it isn’t a blip in history, and there will be no “great return.” Further, it means abandoning “from the River to the Sea” – not only as a slogan, but more importantly, as an ideology and a way of life.

To achieve a two-state solution, there must also be a fresh and realistic process to determine and to challenge what Palestinians and Israelis would be willing to accept.

For instance, consider the matter of recognizing a Jewish state in any form. For years, Palestinian National Authority President and autocrat Mahmoud Abbas has vowed that Palestinians “will never recognize the Jewishness of the state of Israel.” That hardline stance seems to be supported by a majority of Palestinians. Just

the Pew Research Center in 2023 found that only 35 percent of Israelis agreed that “a way can be found for Israel and an independent Palestinian state to coexist peacefully.” Undoubtedly, since October 7, that number would now be much lower.

In addition, pushing right now for an independent Palestinian state risks absolving Palestinian authorities in the West Bank and Gaza Strip of the severe human rights abuses, corruption, and the extremist ideology they have engrained in Palestinians for three-quarters of a century. As Elliott Abrams with the Council on Foreign Relations recently suggested, recognition of a Palestinian state might ensure Palestine is “free,” but there is “no commitment to assuring that Palestinians will be.”

If Palestinian elites aren’t held to account for their crimes, and Palestinian society

between Israelis and Palestinians – and many others agree. But this is neither the time nor the way to go about making that a reality.

If Israelis and Palestinians are ever going to coexist peacefully alongside each other, the dust of this war must settle, and the wounds of grief and fear must begin to heal. Hamas must be defeated, and Palestinians must be held to the same standards as their Jewish neighbours – upholding democratic principles and the rule of law cannot only be expected of Israel. If any of these elements are missing from a two-state strategy and dialogue, then failure and the cycle of war is the inevitable outcome. ❁

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Dr. Casey Babb teaches courses on terrorism and international security at the Norman Paterson School of International Affairs in Ottawa.



# Barriers to care persist but access to MAiD keeps expanding

*Swayed by powerful lobby groups, the federal government has prioritized access to MAiD over the safety of Canadians.*

## Ramona Coelho

**M**y family medicine practice serves predominantly low-income and marginalized patients, including refugees, those who have been in our prison system or are facing charges, and many with disabilities and mental health issues. My patients experience high barriers to care and support and face social isolation and all kinds of discrimination. Observing the impacts of this has left me deeply concerned about our government's priorities.

When the federal government introduced MAiD (a medical procedure that causes death) to those not at imminent risk of dying, I was appalled to learn that my patients – who are frequently blocked from care because of hurdles created by our government and systems – could potentially be offered an expedient death provided by the government.

In 2016, assisted suicide and euthanasia were first legalized in Canada and the term medical assistance in dying (MAiD) was created. Originally MAiD was presented as an exceptional lethal procedure for ending the lives of consenting adults who were experiencing intolerable suffering and were near death. The legislation required that patients meet certain criteria, including having a “grievous and irremediable” medical condition, such as organ failure or cancer, and a “reasonably foreseeable natural death.”

But the Canadian discourse around MAiD rapidly shifted to facilitating access and there has been a broadening of the



Olga Kononenko

number and criteria of those who qualify for MAiD. In 2021, Bill C-7 came into effect and removed some of the safeguards within the original pathway, now called Track 1, and created a new, second track, Track 2, for adults with physical disabilities who are not dying (“disabilities” is an umbrella term that includes impairment, chronic illness and/or other conditions). Furthermore, there is a planned expansion, though the timing is currently being debated in Parliament, for patients whose only medical condition is mental illness. Parliamentary recommendations in 2023 included future expansion to children and to incapable adults who signed advance directives for euthanasia.

Currently, those in Track 1 with a “reasonably foreseeable natural death” can potentially have their life ended the same day as the initial request if all the criteria are met and practitioners are available.

For those in Track 2, those not dying, death by lethal injection is set at a minimum of 90 days after the completion of the first MAiD assessment. To qualify for this track, a patient must also have a “grievous and irremediable” condition and experience intolerable psychological or physical suffering. Suffering is treated as purely subjective with no requirement for further validation. There is also no legal requirement for standard treatment options to be accessible or tried, only that a patient be informed that they exist. This means that a patient who says they are suffering intolerably could access MAiD having declined treatments that would remediate their condition. This could be because the treatment is inaccessible, or unaffordable, or if the patient declines therapy.

The Canadian Association of MAiD Assessors and Providers (CAMAP) has

received \$3.3 million in funding from Health Canada to educate clinicians assessing and providing for those who have requested the service. So although the existing Track 1 and Track 2 pathways have different safeguards, in aiming to allow those near death to have access to MAiD quickly and with no barriers, CAMAP has created a guidance document that suggests clinicians can be flexible as to whether someone fits Track 1's reasonably foreseeable natural death, since the law does not require that the person be terminally ill or likely to die within 6 or 12 months. It also states that a person may meet the reasonably foreseeable criterion if they've demonstrated a clear and serious intent to take steps to "make their natural death happen soon, or to cause their death to be predictable." This could come about from a refusal to take antibiotics for an infection, stopping oxygen therapy, or refusing to eat and drink.

This means that people with disabilities can state their intention to or make themselves sick enough to qualify as having a reasonably foreseeable natural death, as is currently happening with adults who are not dying and yet are having their lives ended within days of their first MAiD assessment. In one case, a man had a mild stroke and received MAiD shortly after, even though he wasn't terminally ill. The reason? He was approved for track 1 as he was temporarily eating less. This was due to following a cautious meal plan ordered by the treating team that was intended to prevent choking and aspiration risks.

Currently, some places in Canada have MAiD rates that are the highest in the world. By the end of 2022, there had been almost 45,000 MAiD deaths across Canada since legalization – more than 13,000 of which took place in 2022 with 463 of those individuals accessing MAiD through Track 2. Estimates based on provincial reporting approximate 16,000 deaths in 2023. Health Canada and MAiD expansionists have tried to reassure the public that the overwhelm-

ing number of MAiD deaths have been mostly Track 1 deaths (implying they were dying anyway) but we do not know how many of those persons were "fast-tracked" and may have had many decades of life left to live and the potential to recover with time and care.

The CAMAP guidance document that seems to circumvent Track 2 safeguards is just the beginning of many serious problems with MAiD legislation and practice in Canada.

“Currently, some places in Canada have MAiD rates that are the highest in the world.”

#### ***Patient safeguards for MAiD are lacking***

Other jurisdictions in the world where MAiD practices are legalized, such as New Zealand and Victoria, Australia, frown on or prohibit raising death as a treatment option. This is due to the power imbalance that exists between physician and patient, coupled with the patients' assumption that the provider will only suggest the best options for their health. Raising MAiD unsolicited could cause undue pressure to choose death. Yet Health Canada's 2023 *Model Practice Standard for Medical Assistance in Dying* recommends that MAiD *should be raised to all who might qualify* if the practitioner suspects it aligns with a patient's values and preferences.

The model practice standard's approach to "conscientious objection" is equally troubling. Health care providers who object to providing MAiD, even in specific cases, are considered conscientious objectors. A physician who is concerned that MAiD is not a patient's best option is supposed to ignore their conscience or professional opinion

and simply refer the patient on so they can seek access to a MAiD death.

This is further echoed in a CAMAP video training session where experts explain that patients might be driven to MAiD by unmet psycho-social needs. The expert leading the session responds to a trainee's concerns: "If withdrawing is about protecting your conscience, you have [an] absolute right to do so." But he adds: "You'll then have to refer the person on to somebody else, who may hopefully fulfill the request in the end." This dem-

onstrates precisely how effective referrals can funnel patients toward death despite legitimate professional concerns and obligations that should have instead led to the process being stopped or paused.

In response to this legislation, many from the disability community have advocated for safe spaces where MAiD can't pose a risk to their lives. The Disability Filibuster, a national grassroots disability community, stated in an open letter that its members have raised fears about seeking health care where death could be offered to them and if at their lowest, they might agree.

The disability community is not being alarmist in this concern. Health care providers often rate the quality of life of those with disabilities as poor despite those patients rating their own quality of life as the same as aged-matched healthy individuals. Put differently, many physicians might consider that patients with disabilities are better off dead, consciously or unconsciously, which might lead them to suggest MAiD.

Besides the problems of mandatory referral and raising MAiD unsolicited,

there is another important factor to consider. Persons with physical disabilities systematically lack much of the essential care they need to live and consequently suffer higher rates of isolation, poverty, and marginalization, all of which can make death their most accessible option. The Canadian government commissioned a University of Guelph study, published in 2021, in which the researchers noted that some persons with disabilities were encouraged to explore the MAiD option – even though they had not been contemplating doing so – because of a

humane living conditions, to be treated with respect and dignity, and to receive appropriate timely medical care. Considering the living conditions and lack of care that as a society we allow persons with disabilities to have, choices to die might be understandable for those like Sathya. But we should ask ourselves if choices, made under inhumane conditions, are made freely if driven by structural coercion.

Disturbingly, there are MAiD assessors and providers who seem to be ok with proving MAiD under such inhumane con-

Our socialized health care system is meant to serve those with disabilities, not consider them a cost to the system.

The Canadian government is currently deciding on the timing for its further roll-out of MAiD, this time for mental illness and with no legislative changes to the current safeguards. This expansion is alarming given what we know is happening already to disabled Canadians under the existing MAiD regime. The Canadian Association of Chairs of Psychiatry wrote a letter in 2022 – and some testified more recently in Parliament – that we are not ready for this development. They have warned that there is no evidence to guide decisions about who with mental illness would not get better. The evidence suggests that for every 5 people whose lives would be ended based on the sole medical condition of mental illness, 2 or 3 would have recovered. We expect to have much higher numbers qualifying for MAiD on the grounds of mental illness in Canada than in other jurisdictions that allow assisted death for this reason, since barriers to care and unmitigated psycho-social suffering do not have to be rectified in this country (as they do elsewhere) before being granted MAiD.

Our government has allowed the incredible power and influence of certain lobby groups and their members to control the public discourse and policies around MAiD and its expansion, prioritizing access to MAiD over the safety of Canadians. Besides the current discussion about when to legalize MAiD for mental illness, the parliamentary committee has also recommended expansion to children and MAiD by advance directives. With eligibility for MAiD continuing to broaden, we are not giving priority to serving those most in need, but instead seem intent on rapidly expanding a path to end their lives. 🌱

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*Dr. Ramona Coelho is a family physician in London, Ontario. Her practice largely serves marginalized patients.*

*Their concerns are validated by the numerous fact-checked stories about MAiD abuses that are emerging in Canada.*

lack of resources that would enable them to live. Those with disabilities can be approved for MAiD based on their disability, but it is their psycho-social suffering that can drive their requests.

The United Nations Special Rapporteur on the rights of persons with disabilities, the Independent Expert on the enjoyment of all human rights by older persons, and the Special Rapporteur on extreme poverty and human rights have all warned the Canadian government that the current MAiD framework could lead to human rights violations.

Their concerns are validated by the numerous fact-checked stories about MAiD abuses that are emerging in Canada. These should give us pause. For example, Sathya Dhara Kovac, 44, ended her life through the MAiD program. She lived with a degenerative disease and her condition was worsening, but she wanted to live but lacked the home care resources to do so. “Ultimately it was not a genetic disease that took me out, it was a system,” Kovac wrote in an obituary to loved ones. All Canadians have a right to

ditions. One such provider testified at a parliamentary committee on MAiD that if someone had to wait a long time for a service that would remediate their suffering, she would still consider that waiting to be irremediable suffering and grant them MAiD in the interim. Therefore, it is not surprising that patients with unaddressed psycho-social suffering are being given MAiD by assessors like her.

When it was considering Bill C-7, the federal government asked the Parliamentary Budget Officer to estimate cost savings to our health care system of the legalization of MAiD. The office did this by looking at the comparative cost savings of MAiD versus palliative care at the end of life. Through this impoverished lens of valuation, it is clear that the cost savings will be even greater when, by many years, we prematurely end the lives of people who have higher care needs, especially when we factor in social services, disability benefits, equipment, and other costs on top of the direct savings to health care budgets. But this is not how we should create budgets or measure outcomes.





## Canada's flippant rejection of our generous natural resource inheritance

*The fanaticism of environmental elitists has made people unwilling to discuss the serious human and economic costs of poorly considered environmental policies.*

**David Polansky**

Strategic energy resources have long been associated with some of the world's most odious regimes. Above the surfaces that cover rich mineral and fossil fuel deposits one finds religious fanatics, brutal tyrants, and corrupt kleptocracies. And yet with one particular resource-rich nation we find not Wahhabism or gangsterism but Mounties and maple syrup.

Canada is the world's second-largest country, and its lands and territorial waters hold some of the world's most substantial oil and gas reserves. Looking at its energy policies, one might think it was Belgium. Canada's resource wealth would seem to be a case of the good guys winning for once.

*Canada's economy is being sacrificed on the altar of elite preferences divorced from the realities of how Canadians actually heat their homes.*

Why then does Canada flee in shame from its geological (and geopolitical) situation?

The answer is that Canada's elites have long ceased to think in terms of its national interests or fiscal priorities but have adopted a naïve environmental dogmatism. Since it ratified the Paris Agreement in 2015, Canada has embraced an ambitious, top-down, international agenda to achieve "net-zero" emissions and limit global climate change.

But the fact is that, despite Canada's size, in absolute terms, its output has risen marginally over the past half century even as its population has nearly doubled. And embracing this climate agenda is hardly a perfunctory matter: it will continue to result in declining incomes for the average Canadian as well as a weakened trade balance for Canada as a whole. Canada's economy is being sacrificed on the altar of

elite preferences divorced from the realities of how Canadians actually heat their homes or put food on their tables.

An honest assessment of Canada's flippant rejection of its generous natural resource inheritance looks more like serial masochism than virtue.

In the wake of Russia's invasion of Ukraine and the global sanctions it triggered, the irony is that with so much of Russia's supply coming offline, Canada could have had a remarkable opportunity to fill the vacuum with its own production capacity.

Despite being the world's sixth-largest producer of natural gas, Canada lacks even a single export terminal for LNG. When critics of Canadian LNG production pointed to the unfeasibility of meeting overseas demand, despite the entreaties of the Germans and other Europeans, they were only technically correct. Canada

Norway's government moved forward with LNG production and export despite past pressure from environmentalists in the European Union that attempted to curtail its fossil fuel extraction.

Canada could have followed Norway's level-headed approach and in that could have helped replace Russian oil in the aftermath of the Ukraine invasion. The curtailing of Canada's energy infrastructure is not imposed by a physical limitation in the world, nor was it commanded from the heavens; it was ordered by the *Canadian Net-Zero Emissions Accountability Act* of 2021, supplemented by ambitious plans promulgated by Ottawa to reshape the institutions and practices of the entire country in pursuit of this quixotic goal. Not just the oil-and-gas sector, but housing, construction, agriculture, etc. must bend before Net Zero.

of themselves – but of blindly adhering to preselected targets at all costs. These apparently unassailable commitments have deprived Canada of the kind of flexible management of strategic interests that prudent political leadership requires.

Indeed, the unrealism of these climate ideals has produced systemic dissembling across the country's major institutions, given the pressure to comply regardless of the efficacy of their practices. In other words, the fanaticism of environmental elitists has made people unwilling to debate the issues at hand or to even discuss the serious human and economic costs of poorly considered environmental policies.

The Environmental, Social, and Governance (ESG) model has had the effect of placing certain questions effectively beyond the reach of politics. But questions of policy – especially those involving the

*A society that has signed on to this sort of imposed austerity is one with less money for infrastructure, entrepreneurship, healthcare, and defence.*

couldn't easily meet overseas demand because our regulatory regime has held up the construction of as many as 18 proposed LNG projects over the past decade, largely due to climate concerns.

Ironically, Germany – the continent's greatest industrial power – needed to reactivate discontinued coal plants to meet its energy demands (hardly an ideal outcome from an environmental standpoint).

Much of the shortfall caused by sanctions on Russia was also made up by LNG contributions from Norway – whose leaders have maintained that reducing LNG output would only cede the market to authoritarian regimes with weaker regulatory controls around their energy industries from both environmental and human rights standpoints. Thankfully,

One can already hear activist outrage that, “to oppose this agenda is to choose temporary profits over the preservation of human life and the planet that supports it.” This rhetoric has proven effective in advancing environmental policies, but it is also a false dichotomy, as it treats the dilemma as one of “good vs. greed” rather than one of complex competing goods.

A society that has signed on to this sort of imposed austerity is one with less money for infrastructure, entrepreneurship, healthcare, and defence. A lack of investment in these sectors also brings serious and immediate human costs. And further, the real issue is not the value of environmental stewardship or of taking steps to moderate consumption – both of which are worthy goals in and

environment and energy – are by their nature political; they have inevitable trade-offs that should be a matter of debate with an eye to our collective interests.

Instead, we have an intolerant environmental elitism that obstructs the open and honest public deliberation that is the hallmark of democratic politics. A more truthful and practical approach wouldn't necessarily promote any one policy, but it would allow for public discussion that recognizes the genuine toll that environmental policy takes on Canada's domestic well-being and its standing in the world. 🌱

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# Taiwan's fate is our future



*If the peoples of the free world allow China to conquer Taiwan, it will herald a new Dark Age of 21st century authoritarianism.*

Winston Chen



*Taiwan is on the front line of a struggle that is global in scope and whose outcome will leave no one unaffected.*

of China (PRC), and to varying degrees identify with many cultural and linguistic elements the two sides have in common. And yet, Taiwan is also idiosyncratic, the result of multifarious external influences that it has absorbed, redefined, and made its own over centuries. This, among other things, includes five decades of being part of Japan and, in the late 1980s, the embrace of liberalism and democracy.

While Taiwan shares cultural and linguistic traits with China, and does business with it, polls have consistently shown that a very small number of people in Taiwan – 1.6 percent – whether they are from the “green” (Taiwan-centric) or “blue” (closer affinity for the ROC, greater willingness to deal with China) agree to immediate unification with China (5.8 percent believe that Taiwan should move in that direction at a later point). The great majority – supporters of Taiwan independence or those who define themselves as citizens of the ROC – are united in the desire for their country to remain free and democratic, and most do so by embracing the “status quo,” or *de facto* independence.

It is because of this high incompatibility, of the divergent paths that the people on the two sides of the Taiwan Strait have taken over the years, that the only possible way by which Beijing’s ambitions of unification can be realized would be by coercion, the use of force, and the violent pacification of millions of subjects under occupation. Because of its ideological rigidity, and because it has staked

## J. Michael Cole

The people of Taiwan elected a new government and parliament on January 13, giving the ruling Democratic Progressive Party (DPP) an unprecedented third term, though one in which the party has lost its majority of seats in the Legislative Yuan. This democratic island-nation of 23.5 million people is at the heart of the contest of the century, one that will determine whether the established international order and the norms that buttress it will endure, or be replaced by authoritarian revisionism, greater repression, and territorial expansionism.

Taiwan, or the Republic of China (ROC), as it is officially named, is on the front line of a struggle that is global in scope and whose outcome will leave no one unaffected. Despite efforts by the Chinese Communist Party (CCP) in Beijing to depict the dispute in the Taiwan Strait as an “internal matter” and the people of Taiwan’s desire for freedom and democracy as “separatism,” this decades-long conflict is, in reality, about two highly incompatible political systems and an authoritarian regime’s colonial designs upon a territory over which it has never had authority.

The people of Taiwan do not dispute the legitimacy of the People’s Republic



its reputation on the so-called “reunification” of Taiwan with the “mainland,” the CCP has put itself in a position from which it cannot back down. No Chinese leader today would be daring and confident enough to go against the entire military-industrial-propaganda complex that was built upon Beijing’s claims over Taiwan.

As it confronts an increasingly belligerent and frustrated CCP, which cannot countenance the Taiwanese refusal to be annexed and which sees in democratic Taiwan a dangerous precedent for the Chinese people, Taiwan has sought to internationalize the conflict.

Meanwhile, Beijing has endeavoured to isolate Taiwan from the international community, poaching the ROC’s official diplomatic allies and using its influence at the UN and elsewhere to deny Taiwan’s participation.

As a result, Taiwan – one of the top 25 economies in the world, a key driver of high technology development, and a beacon of progressive liberalism in Asia – is forced to live a half-existence on the global stage.

Insisting on what it calls the “one China” principle, Beijing forces a zero-sum decision on the rest of the world, coercing countries into refusing to officially recognize Taiwan and punishing them if they refuse to collaborate in this great injustice. To counter this attempted isolation, Taiwan has counted on the help of allies, chief among them the United States, which since 1979 has been its main security guarantor and provider of defensive equipment.

The importance of the US’s role in all this cannot be overstated. Using “strategic ambiguity,” Washington has kept Beijing guessing as to how the US would react if it attacked Taiwan. This red line has played a major part in preventing war in the Taiwan Strait for decades. Continued US leadership in the region, with assistance by other stakeholders in the area, such as Japan, will be paramount as China continues to build up its military capabilities. Nothing could

invite war in the Taiwan Strait more than for Beijing to conclude that the US would not help its fellow democracy defend itself against authoritarian expansionism. US support for Taiwan isn’t purely altruistic, nor is it provocative, as Beijing claims. Rather, it is in the US’s national interest – and that of the community of democracies – for Taiwan to avoid annexation by the PRC.

China’s assertiveness, its corrosive influence on institutions, and its disregard for international norms has forced a reckoning – albeit an uneven one – in many parts of the world. This has only worsened since the Covid-19 pandemic and Russia’s 2022 invasion of Ukraine.



*No people should be given the untenable choice between subjugation and annihilation.*

While Beijing has focused on cracking down on democracy activists in Hong Kong, terrorized of Uyghurs and Tibetans, and tightened its already restrictive domestic laws, Taiwan has gone in the opposite direction – establishing connections, albeit at the “unofficial” level, with an ever-growing number of countries around the world.

China’s supporters have long suggested that, over time, greater integration with the rest of the world would somehow soften up and perhaps democratize the country. But China’s actions have debunked that notion.

Thus, while Beijing lured official diplomatic allies, Taiwan countered asymmetrically by solidifying exchanges with a number of significant economies and countries with which it shared an ideological outlook. All of this was possible – permissible – under those countries’ “one China” policy.

As a result of all this, China has grown much more powerful, and at the same time, more insecure. China today is willing to flex

its military might to get what it wants; aircraft and vessels from the People’s Liberation Army (PLA) now threaten Taiwan – and the region – on a nearly daily basis.

The threat of a major war, once unimaginable, looms larger than ever after Russia’s invasion of Ukraine. Russian President Vladimir Putin has shown the world that tyrants will often make irrational and potentially catastrophic decisions in their pursuit of power.

US leadership and security commitments to Taiwan therefore remain essential impediments to Chinese military adventurism. Meanwhile, other countries are also starting to realize the potential

economic turmoil that would occur if war were to break out in the Taiwan Strait. They, too, have a stake in ensuring that China and Taiwan never go to war.

It’s important to understand that the Taiwanese people are not to blame for China’s sabre-rattling and colonial ambitions. No people should be given the untenable choice between subjugation and annihilation, and if we force such choices on free peoples, we not only lose our humanity but, more problematically, we increase the likelihood that other tyrannical regimes will conclude that it is possible to coerce, terrorize, and subjugate their neighbours. And with such a chain of events, we would be taking our world one step closer to anarchy – into a new Dark Age where might determines the fate of millions, if not billions, of people. ❁

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J. Michael Cole is a Taipei-based Senior Fellow at MLI. An earlier version of this article was originally published in Spanish by Centro para la Apertura y el Desarrollo de América Latina (CADAL) and is published here in English with permission.

# Should we electrify everything?

*Electrification is often touted as a panacea for climate change.*

*However, it is not always the most practical or effective option.*

## Taylor Amatto

The notion of achieving seamless energy transition through widespread electrification appears enticing at first glance. Replacing fossil fuels with “green” electricity produced from renewable sources, including wind or solar, seems like a panacea for soaring carbon emissions.

There is no doubt that electrification offers undeniable advantages, such as enhanced efficiency. In fact, Saul Griffith, a prominent author in the field of widespread electrification, says that simply introducing electrification, without any additional efficiency measures, could potentially slash energy consumption in the United States by more than half.

However, electrification is not applicable to all industries and therefore should not be strictly viewed as the only route to decarbonization.

While electric alternatives exist for specific sectors such as passenger and light-duty vehicles, and residential and commercial heating, there are other sectors where electrification is not as practical. These “difficult to decarbonize” sectors encompass heavy industry (i.e., cement, steel, and chemicals manufacture) and heavy-duty transportation (i.e., trucking, marine shipping, and aviation).

These sectors contribute to approximately 30 percent of global emissions – a level that’s expected to double by 2050 under business-as-usual scenarios. For instance, in heavy industries such as chemicals, reliance on fossil fuel feedstocks (such as coal, oil, and natural gas) presents an obstacle to electrification. Cement kilns and glass manufacturers often need temperatures of more than 1371 degrees Celsius; generating this through electricity would be significantly



iStock

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Replacing fossil fuels  
with “green”  
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sources, including  
wind or solar, seems  
like a panacea  
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carbon emissions.”

more expensive than generating heat by burning natural gas. In heavy-duty transportation, meanwhile, the batteries required for such applications are prohibitively large and heavy, posing significant challenges in terms of efficiency and practicality.

An alternative solution for these industries lies in embracing low-carbon fuels, which should be recognized as a critical component of the overall energy transition.

Low-carbon fuels can include biofuels, synthetic fuels, and hydrogen. Biofuels are fuels derived from renewable biological sources such as crops, agricultural residue, and organic waste, while synthetic fuels are manufactured through chemical reactions that convert carbon dioxide and water into liquid hydrocarbons using renewable energy sources like solar or wind power. Meanwhile, Hydrogen is becoming a frequently discussed component of the energy transition given its large-scale potential in numerous applications.

As a clean-energy investor, I am looking for opportunities that can achieve decarbonization at scale – therefore, low-carbon fuels are a significant portion of my work. For example, in the aviation industry, aircrafts travel much further than ground vehicles, and thus require much more energy than an

average road trip. However, an aircraft's energy use is directly proportional to its mass. This means that using a heavy energy source, such as a large-scale battery to meet required ranges, would further increase the amount of energy needed for the flight. Batteries today are therefore not an efficient use of energy to power an aircraft.

However, the solution may lie in Sustainable Aviation Fuels (SAF): biofuels or synthetic fuels that can leverage existing infrastructure such as engines, storage, and transport lines.

Today, pursuant to the American Society for Testing Materials standards, SAF can be blended to a maximum of 50 percent with conventional jet fuel without any air-

natural gas systems to offset natural gas requirements and as a reducing agent in steel and cement manufacturing.

Hydrogen combustion can achieve heat intensity of up to 2000 degrees Celsius, sufficient for a variety of industries including cement production. Furthermore, hydrogen fuel cells can be used to generate electricity, offering a much higher specific energy and lighter weight than batteries, solving critical range and payload problems in applications such as heavy-duty trucking, where both the issues of specific energy and weight must be considered.

These examples underscore the significant potential of low-carbon fuels in addressing challenges within the "difficult

alternatives. From an incentive standpoint, policies such as production subsidies – as exemplified by initiatives such as the US *Inflation Reduction Act* – can aid in offsetting the higher production costs of low-carbon fuels, making them more competitive in the global market.

These subsidies provide direct financial support to producers, stimulating investment and innovation in the low-carbon fuel sector. By imposing a price on carbon emissions or mandating the use of low-carbon fuels, governments can incentivize the adoption of cleaner energy sources while penalizing carbon-intensive practices.

Electrification is often touted as a key solution due to the potential for cleaner

*The emphasis should be placed on investing capital in decarbonization opportunities that are most appropriate and effective for specific situations, which includes the adoption of low-carbon fuels.*

craft modifications. As per its name, when produced from sources with low carbon intensity scores, such as from waste, agricultural residues, or captured CO<sub>2</sub>, the carbon mitigation benefits for aviation are significant, even at a 50 percent blend rate. As a result, SAF presents a solid alternative to electrifying the aviation sector.

As for hydrogen, its wide range of applications makes it an attractive investment opportunity. When hydrogen is produced alongside carbon capture, utilization, and storage, or created by electrolysis combined with clean electricity, its use as a fuel offers an effective decarbonization method across multiple sectors.

Today, hydrogen is produced relatively inexpensively and is used in industrial processes, primarily in petrochemical feedstock refining or in the production of ammonia as a fertilizer. However, there are multiple emerging important uses of decarbonized hydrogen such as in blending in existing

to decarbonize" sectors much more efficiently than through electrification.

However, despite its potential promise, the adoption of these fuels is not without challenges. Cost stands out as a major barrier, as the production of low-carbon fuels tends to be more expensive compared to traditional fossil fuels, primarily due to emerging technologies and constraints related to feedstock availability.

To overcome this barrier and ensure the widespread adoption of low-carbon fuels, policy intervention is essential. As an investor, it is crucial to recognize the inherent risks associated with relying heavily on policy incentives. However, governmental policies will remain a critical component of advancing the energy transition and must be factored into economic models and investment strategies.

Governments can utilize a combination of incentives and regulations to encourage the transition to low-carbon

energy sources like renewables to power electric technologies. However, it is not always the most practical or effective option in every context.

Instead, the emphasis should be placed on investing capital in decarbonization opportunities that are most appropriate and effective for specific situations, which includes the adoption of low-carbon fuels. This balanced approach ensures that the energy transition is both effective and inclusive – addressing the unique challenges posed by different industries in specific situations, while advancing the overarching goal of sustainability.

Personally, I will continue to focus my investing efforts on low-carbon fuels given the potential they bring to the overall energy transition and the ability to achieve decarbonization at scale. 🌱

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Taylor Amatto is a Senior Vice President with Azimuth Capital Management.



# Canada's housing crisis “trilemma”

*Fast population growth, housing supply constraints, and housing affordability  
– you simply can't have it all.*

**Steve Lafleur  
Josef Filipowicz**

It's tempting to try to have it all – and policymakers are not immune to this. There are trade-offs in everything. Ignoring those trade-offs might work for awhile, but eventually reality catches up to you. Try as we might, we can't have it all.

For instance, we can't have rapid population growth, housing supply constraints, and housing affordability all at the same time. We'll call this the housing affordability trilemma.

The idea of a policy trilemma comes from the Mundell-Fleming model which is included in most introductory economics textbooks. The model was named after Canadian economist Robert Mundell and British economist Marcus Fleming, who developed the idea in the early 1960s. The basic premise of the model, also called the “impossible trinity” or “trilemma” is that you can have two of three policies, but not all three (namely, free capital flow, a fixed exchange rate, and a sovereign monetary policy).

The idea of an impossible trinity can and has been applied to other situations, like the euro crisis in the early 2010s, and provides a useful way of looking at seemingly intractable problems. Plotting the related problems on a Venn Diagram helps visualize the problem. Figure 1 (page 23) is the Mundell-Fleming model, visualized.

Now, let's return to housing policy. Few Canadian problems are as intractable as the now nationwide housing affordability crisis. Rents are rising quickly, apartment availability is falling, and home prices are the highest relative to incomes in the G7. Canada's population growth is outstripping



Yuheng Ouyang

“  
*Few Canadian  
problems are as  
intractable as the  
now nationwide  
housing affordability  
crisis.*”

housing growth. This, unsurprisingly, has undermined housing affordability. Figure 2 (page 23) visualizes this trilemma.

At the root of Canada's housing woes is a severe shortage of homes relative to the number needed. We simply don't build enough homes to adequately house current and future Canadians.

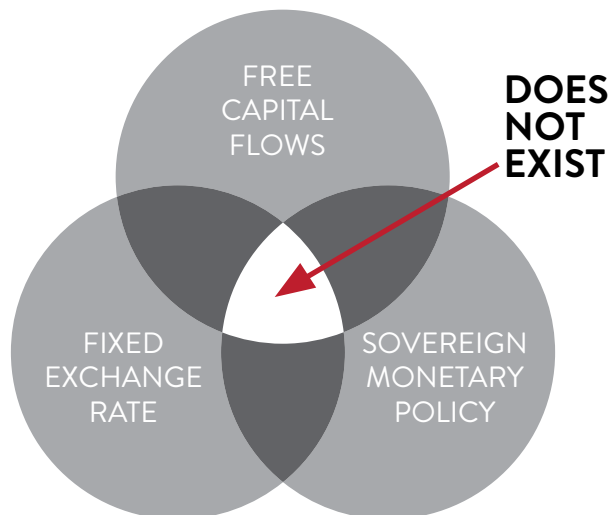
Not only is there cross-party consensus that there's a housing shortage, but most

parties in provincial and federal elections have proposed policies aimed at addressing it. So why do we still have a shortage?

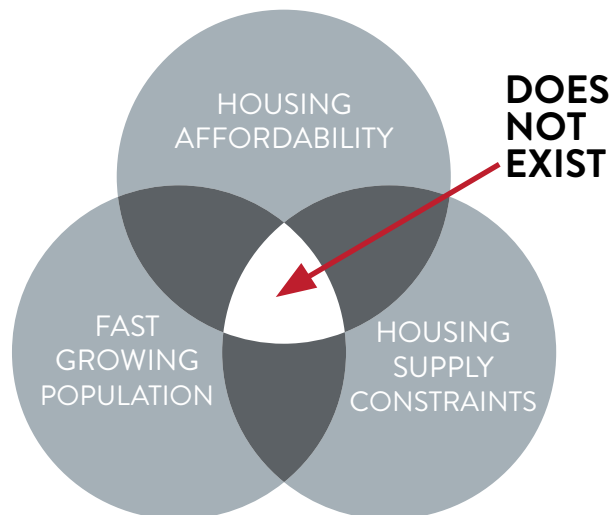
Let's go through the elements of the Canada's housing trilemma (or housing impossibility trinity).

The first element is a fast-growing population. Canada has the fastest-growing population in the G7, and last year alone grew by more than a million people. Barring any major shifts in immigration policy, this trend is unlikely to change any time soon. Indeed, the population grew by 430,635 in the third quarter of 2023. That's the highest quarterly growth rate since 1957.

The second element is restrictions on homebuilding. Whether intended or not, a suite of policies, processes, and regulations that prevent or limit the addition of more homes both in existing neighbourhoods and at the urban fringe. Barriers to density include local zoning bylaws, lengthy and uncertain consultation processes, and growth plans that exclude building or upgrading the infra-



**FIGURE 1:** The Mundell-Flemming model  
(Authors' creation, graphic recreated)



**FIGURE 2:** The housing "trilemma"  
(Authors' creation, graphic recreated)

structure necessary to enable more homebuilding in existing neighbourhoods. Policies explicitly preventing the addition of homes outside of existing neighbourhoods include Ontario's Greenbelt and British Columbia's Agricultural Land Reserve, while softer versions include local planning targets limiting the share of development slotted to occur on city outskirts. Given these limitations, it's no surprise that we've rarely surpassed 200,000 housing completions annually since the 1970s, while the rate of population growth has reached generational highs.

The third element is housing affordability. That is, the ability for individuals and families earning local incomes to comfortably meet their housing needs. This means shelter costs don't prevent them from feeding and clothing themselves, but also allow saving and investing in an education, for instance. For example, some peg the cut-off for affordability at 30 percent of income. By that measure, a household would require an income of over \$100,000 to afford a one-bedroom apartment in Vancouver, for example.

Whether we like it or not, we can't have fast population growth, rigid housing supply

constraints, and housing affordability all at the same time.

For most of our recent past, the choice we've collectively made is to accelerate population growth while maintaining many (if not most) restrictions on both outward and upward growth, meaning we've excluded the possibility of achieving broad affordability. The consequences? All the symptoms mentioned before: rising rents, falling vacancies, higher and ownership costs.

Despite recent pivots by a growing number of local and provincial governments, the balance of housing and land-use policies remains firmly tilted against reaching the level of homebuilding we need to restore some semblance of affordability, which by some estimates means more than doubling homebuilding. To wit, housing construction has remained remarkably stagnant – even slightly declining – in recent decades. Even the bold changes to zoning recently passed in British Columbia, Ontario, and Nova Scotia are unlikely to double the number of housing built provincewide.

But, as the housing trilemma suggests, there are alternative routes. If Canadians remain adamant about affordability, we can demand more meaningful reduction or

removal of policies preventing a growth in housing supply, or we can demand a reduction in population growth, or both. These are not easy choices but ignoring them doesn't make them go away. We need to build upwards, outwards, or both, in order to meaningfully increase housing production. We can't say no to every solution and expect better results.

The point is, there's broad consensus that Canada faces a housing crisis, and that major policy actions are needed to fix the problem. There's also a tacit consensus that the policies feeding the crisis should remain in place.

To put it more bluntly, everyone wants to solve the housing crisis, but no one wants to solve the housing crisis enough to make the hard choices. Until we collectively shift our priorities, we are choosing to sacrifice housing affordability. We can't have it all. If we insist on maintaining fast population growth and restrictions on supply, we'll get the broken housing market we deserve. 🍷

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# Situation critical

*Canadian miners desperately need domestic and allied capital – but so far, it's China that's filling the gap.*

## Joseph Bouchard

After more than a decade of aggressive efforts and development, China now stands tall as the largest mining producer and financier in the world, by some margin. It is the leading miner of 29 commodities including aluminum, coal, gold, magnesium, tin, phosphate, nitrogen, zinc, graphite, tungsten, rare earths, and other critical minerals.

Canada, which used to be a leading force despite its small demographic size and investment pool, is now at the bottom end of the global top 10 mineral producers.

Still, China is looking to capitalize on the extent of Canada's mining network nationally and around the world to advance its interests. With Canadian mining companies desperate for cash and the Canadian government showing little interest in financing a mining boost (especially in comparison to China), the People's Republic is taking advantage of its leadership position to push it even further.

Even with the recent *Investment Canada Act (ICA)* and the Canadian Critical Minerals Strategy, China has made Canada's efforts look small by comparison.

As part of Canadian government's aim to reduce Chinese economic influence in Canada, it made statements relating to the *ICA's* application to this context in late 2023. The act gives the government the ability to review and reject foreign investments to ensure that they are beneficial to the Canadian economy and society, while promoting "positive foreign investment." The national security component of the *ICA* could be used to reject Chinese mining investment in Canada.



“  
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mineral producers.”

The *ICA* is complemented by the recent Critical Minerals Strategy, which aims to decouple Canada's mining supply chains from China and other adversaries, while stimulating the Canadian and allied critical mineral sectors. In line with these strategies, Canada ordered three Chinese firms – two of which are based in Hong Kong – to divest from their Canadian mining investments in November 2022.

However, early this year, Zijin Mining bought a 15 percent stake in Canadian-owned Solaris, testing the extent of the *ICA* and Critical Minerals Strategy. Most recently, Chengdu-based Shenghe Resources acquired a stake in Australian company Vital Metals, which owns a rare earths mine in the Northwest Territories, a deal that included buying the mine's entire rare earths stockpile. China's Sinomine Resource Group also purchased one of Canada's only two lithium mines in Manitoba in 2019, a move that was left unchallenged.

Jiangxi Copper, one of the largest Chinese state-owned mining companies, also took over a majority stake in First Quantum Minerals in November 2023, which up until recently operated a copper mine worth over 5 percent of Panama's total gross domestic product, as well as other large mines in Latin America, Africa, and elsewhere.

China, through the state-run China Investment Corporation, also has the largest shareholder position in Teck Resources and Ivanhoe Mines, both based in Vancouver.

The *ICA* has yet to put a dent in these investments.

These strategies will not truly work until there is a serious effort to bring domestic and allied capital into the Canadian mining sector, which desperately needs it. The Canadian government and mining companies are stuck in a difficult position – while they may not agree with China's ideological or geopolitical posture, China is the global leader in the mining sector, and has the energy and money to sustain it. Minister of Natural Resources Jonathan Wilkinson even went so far as to say that “of



course Canada will continue to have trade with China, some of that may involve trade in critical minerals.”

China has developed a prominent role as financier in the country, arguably since Xi Jinping’s rise to power in 2012. There were smaller acquisitions and investments before 2012, but it spiked in 2012 and onward. Since then, China has been the world’s most aggressive financier of mining, having invested \$1.3-trillion in over 20,000 projects in 165 middle- and low-income countries.

The first instance of Chinese mining investment in Canada was in February 2012 with Cameco, which received unspecified but “considerable” Chinese investment before seeing record earnings in the first quarter of the same year. Later in September, Canada

alternatives, Canadian mining companies are accepting Chinese financing and investment to sustain their operations.

Given Canada’s need for capital, China is in a position to benefit from Canada’s established mining infrastructure and longstanding expertise in the mining field. China has been throwing billions of dollars in mining around the world to project its own power and increase its stake in the burgeoning sector.

While the global demand for critical minerals is ramping up, many Canadian mining companies – and the Canadian government along with it – have been unable to meet that demand. Companies, especially smaller and medium-sized companies, are barely profitable and face difficulties attracting investment.

2022, with China’s Rare Earth Elements (REE) mining sector being responsible for 60 percent of all production. Last year, Chinese metals and mining investment hit \$19.4 billion, a new record.

Generally, China accounted for about 28 percent of all mining output in 2020, with that share only increasing. China is the world’s largest producer of electric vehicles, batteries, solar panels, and wind turbines, and its mining power is helping sustain this production.

Apart from this China-dependence, Canada has few alternatives. Despite the passing of the *Inflation Reduction Act* in the US, and critical mineral funding opportunities from the Department of Energy and Department of Defence, investment is not flowing at the levels needed to

“While the global demand for critical minerals is ramping up, many Canadian mining companies – and the Canadian government along with it – have been unable to meet that demand.”

signed a Foreign Investment Promotion and Protection Agreement (FIPA) with China, which could boost mining investment from China into Canada.

In 2016, a report from the CBC outlined that Canada was making “too-rosy investment pitches” to China in the mining sector, with Canada misrepresenting its mining sector to entice investment from China. Now, China has links to more than two dozen Canadian mining companies with stakes in critical minerals.

As a result, Canada is now part of China’s push into the Western world, where it is trying to push its interests and values into the fore. Investors in Beijing, Shanghai, and Hong Kong are happy to fuel the government’s mining push – particularly in Canada. With a growing need for capital and faced with few

Mining, in an increasingly unpredictable geopolitical environment and one where anti-mining protests are so common and disruptive, is a risky and costly business. Still, mining, especially in critical minerals, is immensely important to Canada’s economic, energy, geopolitical, and security interests.

The world will need to radically increase its mining output just to maintain – never mind increase – its population and living standards. That will require substantial capital.

Investors are understandably hesitant to invest in such a volatile sector. China, however, with its nearly unlimited cash and ambitious elite class, is happy to fill the gap. In the first half of 2023, China’s metals and mining investment reached \$10 billion, a 131 percent increase from

move the dial. The Biden administration has implemented programs such as the China and Transformational Export Program (CTEP) through the US Export-Import Bank to stem the bleeding, but China retains its comparative advantage in this sector and a lack of private investment from the West is conspiring against a meaningful disruption to its pole position.

There are still a few policy alternatives Canada and its allies haven’t tried. Promoting domestic investment through public economic measures could help increase the flow of capital into Canadian mining. Options could include the federal government encouraging stock buy-backs, or providing cheap loans for mining investors, like the *Inflation Reduction Act*

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# Re-envisioning Canada’s approach to international cooperation

*It is time to make “Canada is back” something other than a dated slogan.*

**Balkan Devlen  
Jonathan Berkshire Miller**

In the wake of a 2015 election victory, Prime Minister Justin Trudeau famously announced: “Canada is back.” Unfortunately, the hopes of 2015 seem dated in 2024 as Canada struggles to find its place amid the intensity of rising geopolitical competition.

Federal polling now strongly suggests that Pierre Poilievre’s Conservatives are likely to win the next election. This raises an important question: how might a new Conservative government offer a serious rethink of Canada’s approach to international engagement in order to make “Canada is back” something other than a dated slogan?

As tempting as it would be for a cost-conscious Poilievre government to see Canada’s foreign aid budget purely as a source of savings, international development is, alongside diplomacy and defence, a key pillar of Canadian statecraft. The failure to strategically coordinate Canada’s efforts on these three fronts means that Canada’s engagement on the global stage has had very little impact in recent years.

Canada has put international engagement on autopilot. We have been content with drifting along, doing things because that’s the way we have done them for the last 30 years. This drift is no longer appropriate or sustainable. Perhaps, in the glow of the end of the Cold War and a couple decades of relative peace and security, Canada could get away with unfocused or even blatantly mistaken priorities for international cooperation, but in today’s more tumultuous reality we don’t have that luxury.



Strategic engagement must start with a full review of Canada’s international cooperation activities. This review should address the unfortunate reality that Canada has developed a reputation as a nation that wants to be at every multilateral table but without becoming a serious contributor at any table. We need to ask: at which tables do we need to sit, and which ones do we need to get up and leave? Canada has limited resources. Thinly spreading them out to be in as many places as possible has failed. We need to be deliberate about where we are rather than seek to be everywhere.

Before deciding which multilateral organizations to invest or become involved in, we should assess whether they align

with our national interests and stated policy goals. In an age of geopolitical competition, it cannot be taken for granted that every multilateral organization meets that test. We must be willing to walk away from organizations that do not serve a strategic purpose for Canadian interests – such as the Asian Investment Infrastructure Bank (AIIB), which is essentially a tool for CCP influence in the world.

Rather than a blind commitment to multilateralism, there should be a turn to “minilateralism” – that is issue-based, narrow groupings of like-minded states. This is the future of international cooperation, and Canada thus far has failed to be invited into some of the most significant minilateral

organizations (such as the AUKUS security alliance, made up of Australia, the United States, and the United Kingdom, or the Quad grouping of the US, Australia, India, and Japan). As geopolitical rivalries intensify it is crucial that Canada works more closely with those who share our common values and objectives. This allows for some of the benefits of multilateralism without the risk that organizations become paralyzed over basic agreement on their purpose.

We need to also start thinking of international cooperation as a part of statecraft more broadly, and not simply as some sort of charity. Good intentions are not a substitute for clear goals and metrics to measure success. Such metrics need to be clearly linked with advancing Canada's interests including strengthening rule of law and free markets abroad, pushing back against state capture by authoritarian actors, fighting corruption and financial crimes, contributing to security, stability, and societal resilience in developing countries, improving outcomes related to global health and climate change, and opening new markets for Canadian businesses. We should have a real interest in a robust international cooperation program that advances projects that make a difference



*Rather than a blind commitment to multilateralism, there should be a turn to “minilateralism” – that is issue-based, narrow groupings of like-minded states.*

but that requires measurable evidence of the good accomplished by any given investment.

Demonstrating the results is also important for another element of a renewed approach. This strategy will only be successful if it engages the Canadian public on why a focused international cooperation strategy is in Canada's interest. It is especially key to reach out to some nationalist conservatives who may be skeptical of the value of foreign aid and international cooperation, individuals for whom the arguments that Canada should

totally disengage are appealing. To reach these potential skeptics a government will need to be able to articulate the clear linkage between Canadian interests and foreign aid, international cooperation, and global engagement.

Finally, a renewed approach should be one that looks beyond government to bring in the private sector, NGOs, faith groups, and diaspora organizations in formulating and carrying out an international cooperation strategy and moving beyond state-to-state foreign aid. Canada's international cooperation should not narrowly reflect the values of a handful of officials in Ottawa. It should reflect a much broader, more inclusive set of generally agreed upon principles, and serve the interests of the entire nation.

Canada cannot afford to disengage in a dangerous world, but equally, we cannot afford engagement that fails to produce results or protect our national interests. It is time to get serious about getting Canada back on the world stage. ✨

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### **Situation critical (Bouchard)**

*Continued from page 25*

does for the US, or establishing strategic reserves of critical minerals similar to the petroleum reserves organized through the International Energy Agency.

It would also be helpful to make the regulatory process around mining – which on average takes years if not decades to complete – swifter, cheaper, and easier to navigate. Doing so would make investments less risky as well, given the shorter time horizons they would require before the start of operations, which sometimes can mean

fluctuating commodity prices (and with that, fluctuating profit).

Encouraging other less damaging foreign actors, like the US or Australia, to invest in Canadian mining is also another considerable option. If Canada could negotiate some kind of mining agreement or investment deal beyond existing free trade agreements, it could boost bilateral mining cooperation. Lowering the regulatory bar of entry for foreign investment from allied nations like the US and Australia would be a significant help. Canadian mining executives themselves are asking for it.

Both the US and Australia have already

expressed concerns over China's dominance in the mining and critical minerals sectors, and pushed back against Chinese acquisition of Western mining operations. Yet, the lack of foreign capital from outside China has made the shift difficult, and other countries will need to step up if they want a larger role in the future of the mining sector – especially with global demand for critical minerals expected to increase. This kind of public backing and multilateral cooperation could just be the key to increasing energy independence. ✨

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# Ideas change the world

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