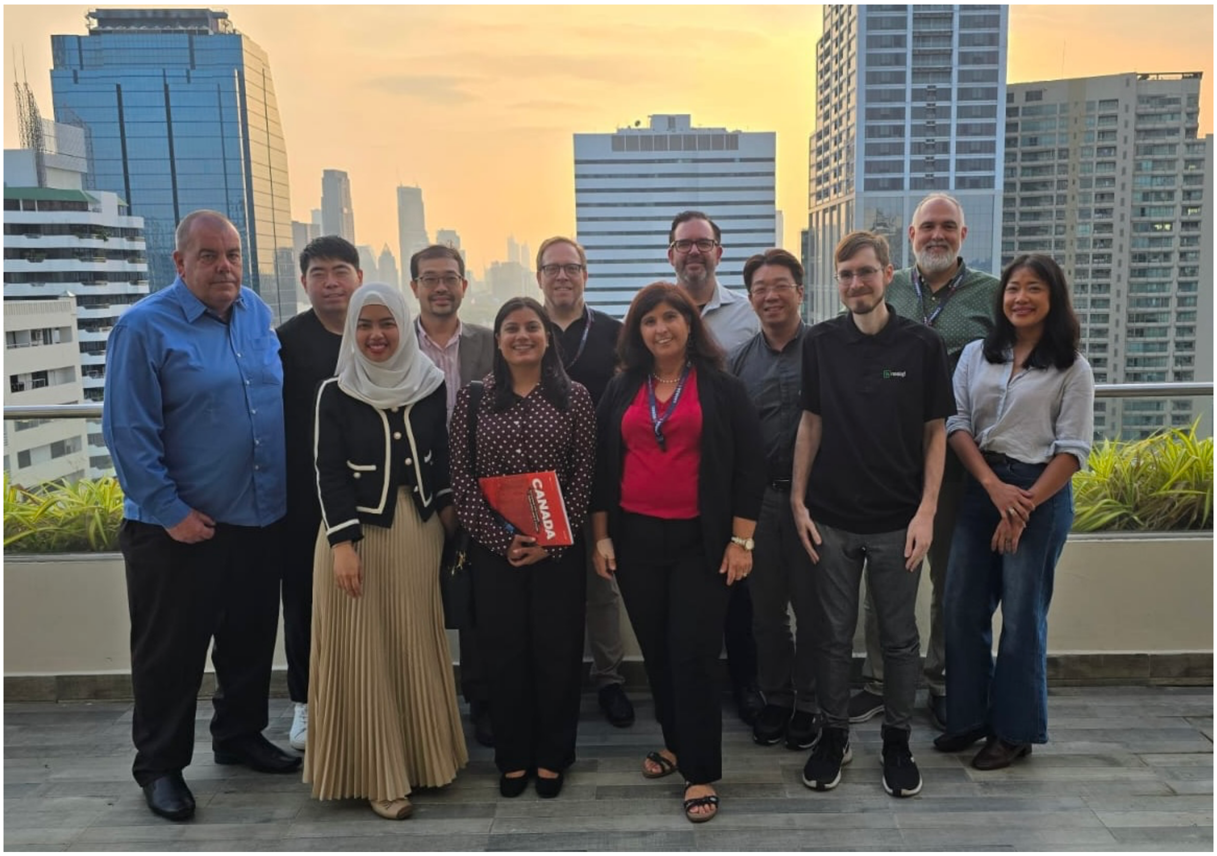
PILOT REPORT | MAY–JUNE 2026

CANADA Railway & Infrastructure HUB

From concept to international market activation

Prepared by Martin Beaulieu for the Canada Railway & Infrastructure Hub | August 2026



Canada Hub participants and supporting partners following the May 5 Bangkok briefing, ahead of Asia Pacific Rail 2026.

Contents

Executive summary

A pilot that moved from idea to market activation in less than three months

The Canada Railway & Infrastructure Hub was launched in 2026 to test a simple proposition: selected Canadian rail, transit and infrastructure companies can create more value internationally when they are presented within a credible ecosystem of projects, public institutions, operators and partners rather than as isolated exhibitors.

The model was deliberately two-way. It connected Canadian export capabilities to international projects and counterparties while using Canada's major rail and transit investment cycle to open conversations on market entry, localization, partnerships and supply-chain integration. The first deployment took place at Asia Pacific Rail in Bangkok on May 6–7, supported by briefings, meetings and institutional engagement. The Hub then returned to the Canadian market at TRACCS Rail Day in Toronto on June 17–18. A Team Canada Trade Mission to Japan, while outside the original pilot scope and primarily a Resologi mission, extended selected relationships and federal visibility.

> EXECUTIVE CONCLUSION
>
> **The pilot established a strong proof of concept and an encouraging case for market relevance. Repeat demand is emerging, but commercial scalability has not yet been demonstrated. The appropriate next step is a targeted second phase—not automatic expansion—built on qualified companies, specific opportunity themes, funded delivery capacity and a complementary operating model with TRACCS and public partners.**

What the pilot demonstrated

- Canada's rail and transit project pipeline is a powerful international conversation starter when framed around investable projects, supplier needs and partnership pathways.
- The platform appears most valuable to specialized and mid-sized firms, technology providers and companies entering new markets—not necessarily to the largest global engineering groups, which already operate their own international channels.
- The value lies in the full activation cycle: market intelligence, positioning, stakeholder targeting, introductions, institutional access, documentation and follow-up—not booth traffic alone.
- Export and inbound opportunity development should remain connected, but the inbound narrative must emphasize expansion, localization and Canadian partnerships more than first-time greenfield investment.
- The Hub is strongest as an industry activation layer that complements TRACCS, the Trade Commissioner Service, provincial investment agencies, EDC and participating companies.

Evidence-based assessment

TEST	ASSESSMENT	EVIDENCE
Proof of concept	Strong	Two activations delivered; visible national narrative; credible senior relationships; practical evidence base.
Market relevance	Encouraging	Independent research confirms a selective but meaningful addressable ecosystem in Canada and credible counterparties abroad.
Repeat demand	Emerging	At least one participating company has already requested 2027 budget parameters; Railmetrics/Eddyfi expressed interest in future Hub participation before its ownership change; Prelco/Beclawat and other specialized firms entered follow-up discussions.
Commercial scalability	Not yet established	Registration, engagement and visibility do not yet demonstrate willingness to pay, repeat participation or sufficient deal flow.

What this means for public partners

DECISION LENS	CURRENT READING
Export / trade	The addressable export market is selective, not mass-market. The next test is whether a small cohort with proven market fit and a genuine need for external market-development support will commit to a 2027 program.
Investment attraction	The stronger inbound thesis is expansion, localization and Canadian partnership development among firms already active in Canada—not a large pool of greenfield entrants.
TCS / EDC / public agencies	The Hub is most useful when it qualifies companies and opportunities before routing them into existing public mandates, rather than duplicating those mandates.
Program decision	The evidence supports a targeted second validation phase. It does not yet justify automatic scale, a large standing pavilion or a permanent national structure.

Known pilot indicators

INDICATOR	CURRENT EVIDENCE
International activation	Asia Pacific Rail, Bangkok — May 6–7, 2026
Domestic activation	TRACCS Rail Day, Toronto — June 17–18, 2026
Strategic add-on	Team Canada Trade Mission to Japan — June 22–26, 2026
Consolidated relationship base	200 contact records in the final master workbook, including 15 curated priority follow-up relationships
Participating / represented firms	Resologi, Willowglen Systems, TISEC, Railmetrics/Eddyfi and Infrastructure United
Institutional participation / support	Investissement Québec International, Government of Ontario, Trade Commissioner Service, EDC, Embassy of Canada to Thailand, EECO, Infrastructure Council and TRACCS
Independent ecosystem signal	675 normalized organizations in the June 6 pre-event Rail Day snapshot; 242 researched in depth; 166 with Strong or Possible Hub characteristics—an indicative ecosystem, not proven demand

01 Origin, intent and strategic position

The Hub emerged from a practical market-development gap. Canada is entering a major cycle of investment in passenger rail, urban transit and related infrastructure, yet Canadian companies often appear abroad as individual mission participants, vendors or exhibitors. The pilot tested whether a coherent, project-led national story could make selected companies and international counterparties easier to connect.

The original intent was not to create another association or a permanent institution. It was to test a coordinated platform linking companies, governments, transit authorities, investors, suppliers, integrators and partners around concrete opportunities. This remains the right positioning: a market-development and industry-connection platform for selected Canadian and international rail and infrastructure firms seeking opportunities beyond their existing networks.

Core positioning

PILLAR	PURPOSE
Export development	Position selected Canadian systems, inspection, data, infrastructure and technology capabilities in markets where a specific fit is demonstrated.
Canadian market development	Connect international firms to Canadian projects, partners and public agencies, distinguishing new entry from expansion and localization.
Partnerships	Build relationships among operators, OEMs, engineering firms, integrators, suppliers and institutions.
Project intelligence	Translate market and project developments into specific entry points, follow-up themes and supplier opportunities.
Ecosystem activation	Coordinate industry and public actors without replacing their mandates or assuming ownership of their client relationships.

STRATEGIC DEFINITION

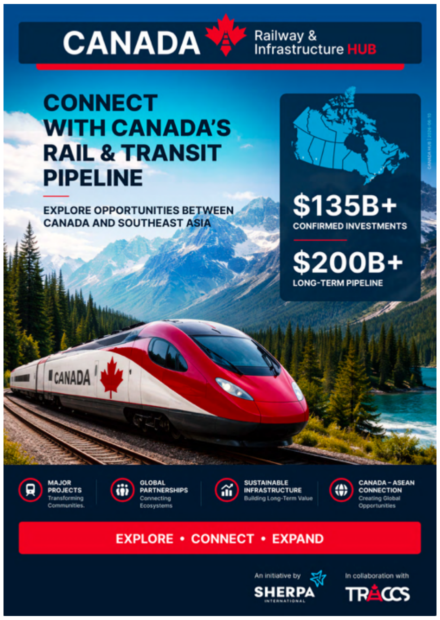
A market-development and industry-connection platform for selected Canadian and international rail & infrastructure companies seeking opportunities beyond their existing networks.

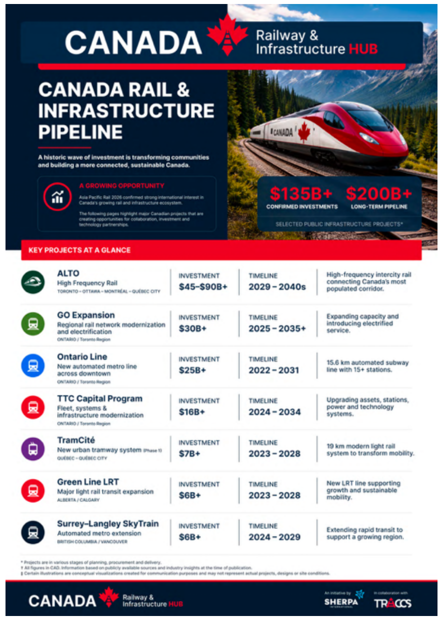
Why the two-way model still matters

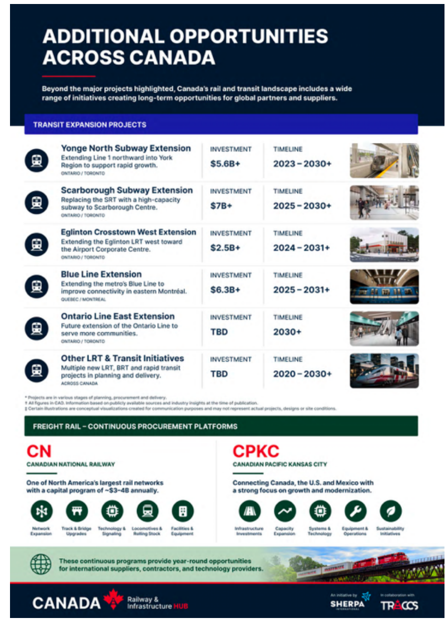
An export-only model is too narrow for rail. International companies can be buyers, consortium partners, OEM channels, investors, suppliers or market entrants. An FDI-only model is also incomplete because Canadian firms require market intelligence, introductions, certification pathways and local partners abroad. The Hub creates value by linking these flows and routing each opportunity to the appropriate company or institution. The pilot also corrected an important assumption: most of the apparent inbound opportunity is not first entry into Canada, but deeper localization, regional expansion and Canadian supply-chain integration.

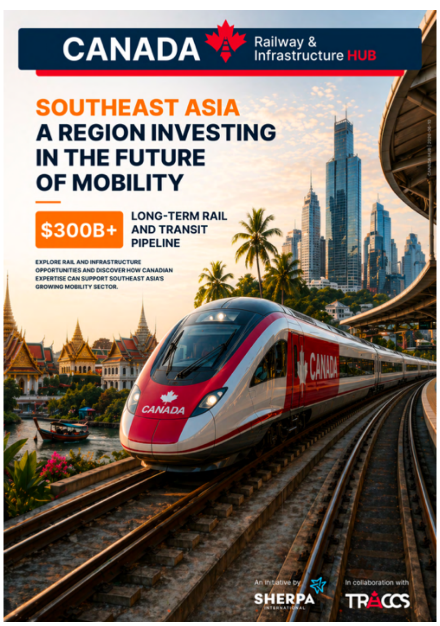
The booklet as a market-development asset

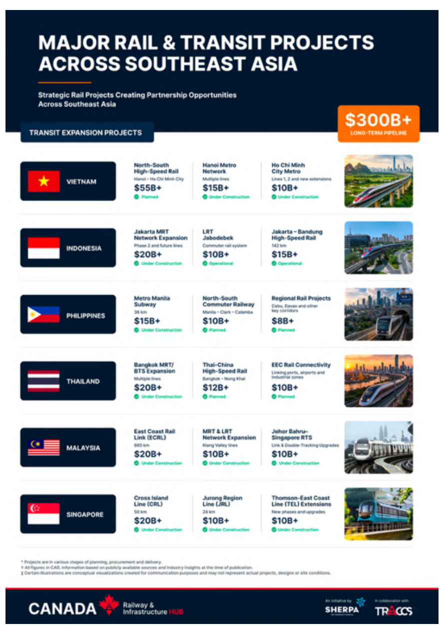
The Canada Rail & Infrastructure Projects Booklet became one of the pilot's most useful shared assets. Partners and industry stakeholders repeatedly noted the value of seeing major Canadian rail and transit programs, participating organizations and international market context assembled in one market-facing document. The booklet should be treated as a first inventory rather than a finished product. A maintained digital version could become a persistent Hub asset if ownership, update responsibility and resourcing are defined.

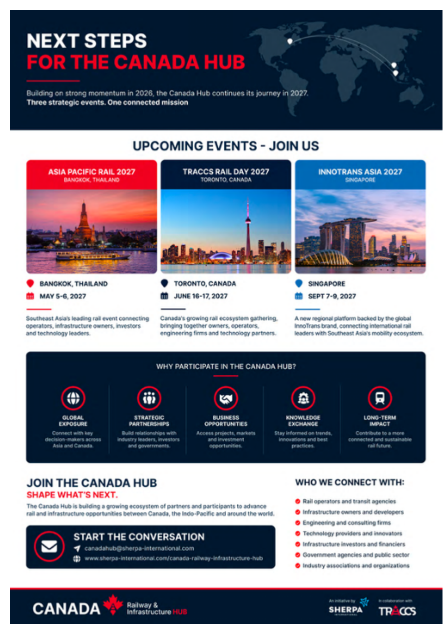












The Canada Hub website has recorded more than 325 visits since going live in May 2026.

02 Pilot timeline and activation model

DATE	ACTIVITY	ROLE IN PILOT
Late Feb.–Apr.	Concept development, partner recruitment, project research, booklet and activation design	Build the Canada ↔ global proposition and a first operating model.
May 5	Bangkok briefing and partner coordination	Align participating organizations, regional context and engagement priorities.
May 6–7	Asia Pacific Rail, Bangkok	Deploy the Hub internationally and test the two-way narrative.
May 7–8	EECO dinner and formal project briefing	Move from exhibition networking to direct institutional and project dialogue.
June 17–18	TRACCS Rail Day, Toronto	Reconnect international opportunities to Canada's domestic ecosystem.
June 22–26	Team Canada Trade Mission, Japan	Strategic continuity outside the original pilot scope; advance selected relationships and federal awareness.

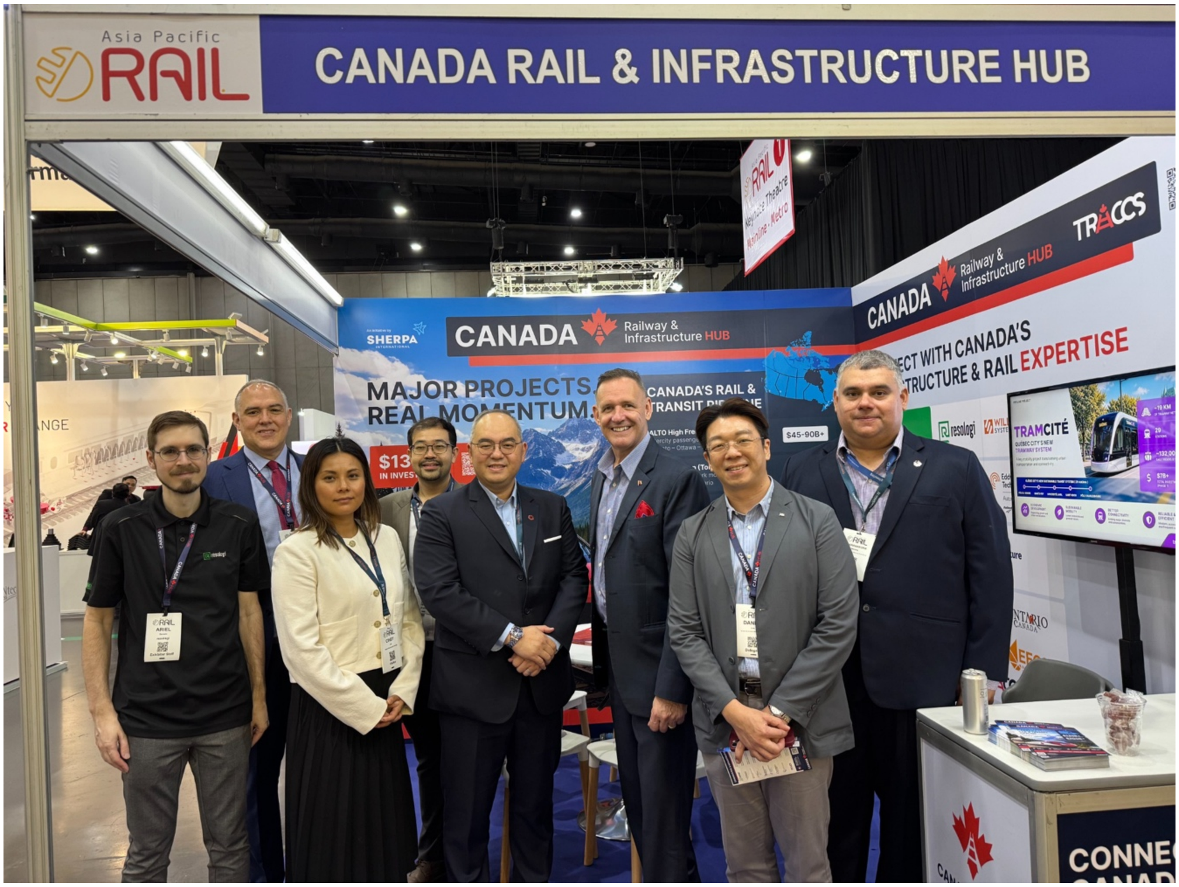
Operating model tested

- A national market narrative and project-led booklet;
- A branded meeting point at two industry events;
- Pre-event briefings and coordination with institutional partners;
- Planned and walk-in discussions, organizer introductions and off-floor relationship building;
- Formal institutional dialogue with EECO;
- A consolidated contact, opportunity and evidence base;
- Communications that extended visibility beyond the physical booth.

The model worked, but the pilot also exposed its limits. Building the platform while simultaneously recruiting partners and arranging meetings reduced predictability. A second phase requires earlier market selection, clearer roles, dedicated resources and a smaller set of qualified opportunity themes.

03 Bangkok: Asia Pacific Rail and institutional follow-up

Asia Pacific Rail was the first full test of the Hub. The Canadian presence was positioned as more than an exhibition booth: it combined a visible national story, Canada's project pipeline, selected Canadian capabilities, a meeting point and a platform for government and commercial conversations.



Canada Hub discussion with ST Engineering at Asia Pacific Rail. Participants included Canadian institutional partners and company representatives.

Canadian participation and delivery team

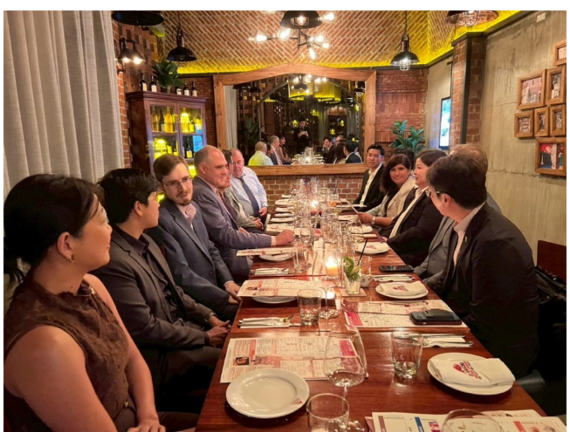
ROLE	PARTICIPANTS / CONTRIBUTION
Featured companies	Resologi; Willowglen Systems; TISEC; Railmetrics/Eddyfi; Infrastructure United.
Institutional participants	Investissement Québec International; Government of Ontario; Trade Commissioner Service; EDC; Embassy of Canada to Thailand; EECO engagement.
Program and sector leadership	Martin Beaulieu (Sherpa International); Geneviève Thémélis-Tremblay (systems integration); Ciaran Mullan (rail industry connector/media); strategic support from Stephen Hudon (procurement).
Local delivery support	Duangkamol (Noi) Pengkrajarng and Permpong (QP) Tharmviboonsri supported booth coverage, transportation, logistics and local coordination in Bangkok.
Supporting industry partners	TRACCS and the Infrastructure Council supported the initiative and its broader industry positioning.
Company delegates present	Ariel Gamelin and Bruno Ricard (Resologi), Blake Bradburn (Willowglen) and Guillaume Turbide (Railmetrics/Eddyfi). Joel Hay (TISEC) and Kémoo El Sayed (Infrastructure United) were represented through the Hub but were not present on site.

Strategic relationships and market intelligence

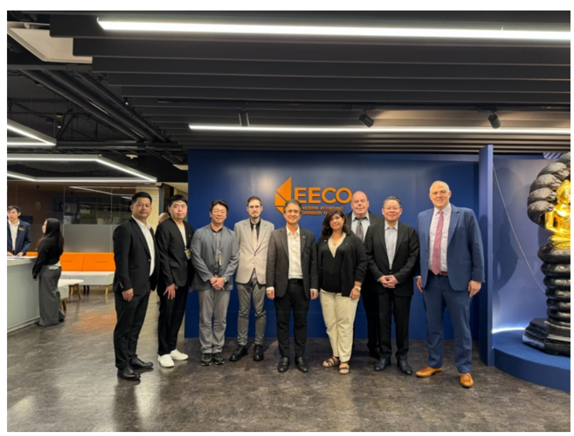
RELATIONSHIP	WHY IT MATTERS	FOLLOW-UP
Arup APAC / TC Chew	Senior engineering relationship across APAC; potential influence on project concepts, partnerships and procurement pathways.	Maintain executive dialogue around 1–2 concrete Canada–APAC themes and include him in relevant Canadian or Hub-related industry events when appropriate.
RATP Dev Asia / Henri Pottier; Adrien Marcelat	Operator/developer access through Singapore and Manila, with a useful Francophone bridge.	Re-engage in Singapore/Manila and qualify operator needs.
Bureau Veritas / Martin Dilly	Certification and compliance can enable or block Canadian market entry.	Scope reusable pathways for selected Canadian technologies.
SBS Transit / Jeffrey Sim, Group CEO	Senior operator relationship in Singapore with broad visibility across the regional transit ecosystem.	Maintain the executive relationship as a source of operator-side market intelligence, context and introductions where appropriate.
InnoTrans Asia / Joyce Sng	Potential Singapore activation platform for 2027.	Begin early scoping tied to qualified companies and meetings.
Terrapinn / Jonathan Drape-Comyn	Critical event relationship for APR 2027.	Debrief the pilot and design a more meeting-led activation.
ST Engineering	Singapore-based technology group with direct engagement in Bangkok and Toronto; already present in Canada.	Frame as localization, partnership and reciprocal supply-chain development—not greenfield entry.
BTS / Asia Era One / Department of Rail Transport	Operator, concession and policy access within Thailand's rail ecosystem.	Qualify needs by project and route to relevant Canadian capabilities.

EECO: from networking to institutional dialogue

A May 7 dinner with Eastern Economic Corridor Office leadership was followed by a formal May 8 meeting at EECO offices. The Canadian delegation included Martin Beaulieu, Ciaran Mullan, Geneviève Thémélis-Tremblay, Ariel Gamelin, Blake Bradburn, Guillaume Turbide, Daniel Lim and Ritishka Grover. EECO participation included senior leadership—among them Assistant Secretary General Cholachit Vorawangso Virakul and Deputy Secretary General Dr. Tharit Issarayangyun—as well as directors and officers from the High-Speed Rail Linking Three Airports project and the Investment Strategy Division. The briefing covered EEC infrastructure, HSR, promotional zones, industrial development and EECiti. This sequence illustrates the Hub's intended value: moving from general visibility to direct institutional dialogue and project intelligence.



May 7 working dinner with EECO leadership.



Canada Hub delegation and EECO representatives following the May 8 formal briefing.

RTRDA and Thailand’s local-content agenda

The Rail Technology Research and Development Agency (RTRDA) presented Thailand’s deliberate strategy to increase domestic rail capability. The opportunity for Canadian firms is therefore broader than direct product sales: it includes certification, testing, technology transfer, training, systems integration, validation and supplier development. Blue Engineering’s role in supporting Thailand’s rail manufacturing ambitions reinforces the importance of industrial partnerships and local-content strategy. A particularly useful outcome was the relationship established with Yannick Jacob, Urban Mobility Expert at RTRDA working under Expertise France; follow-up discussions are already exploring potential working sessions with Resologi and other relevant stakeholders.

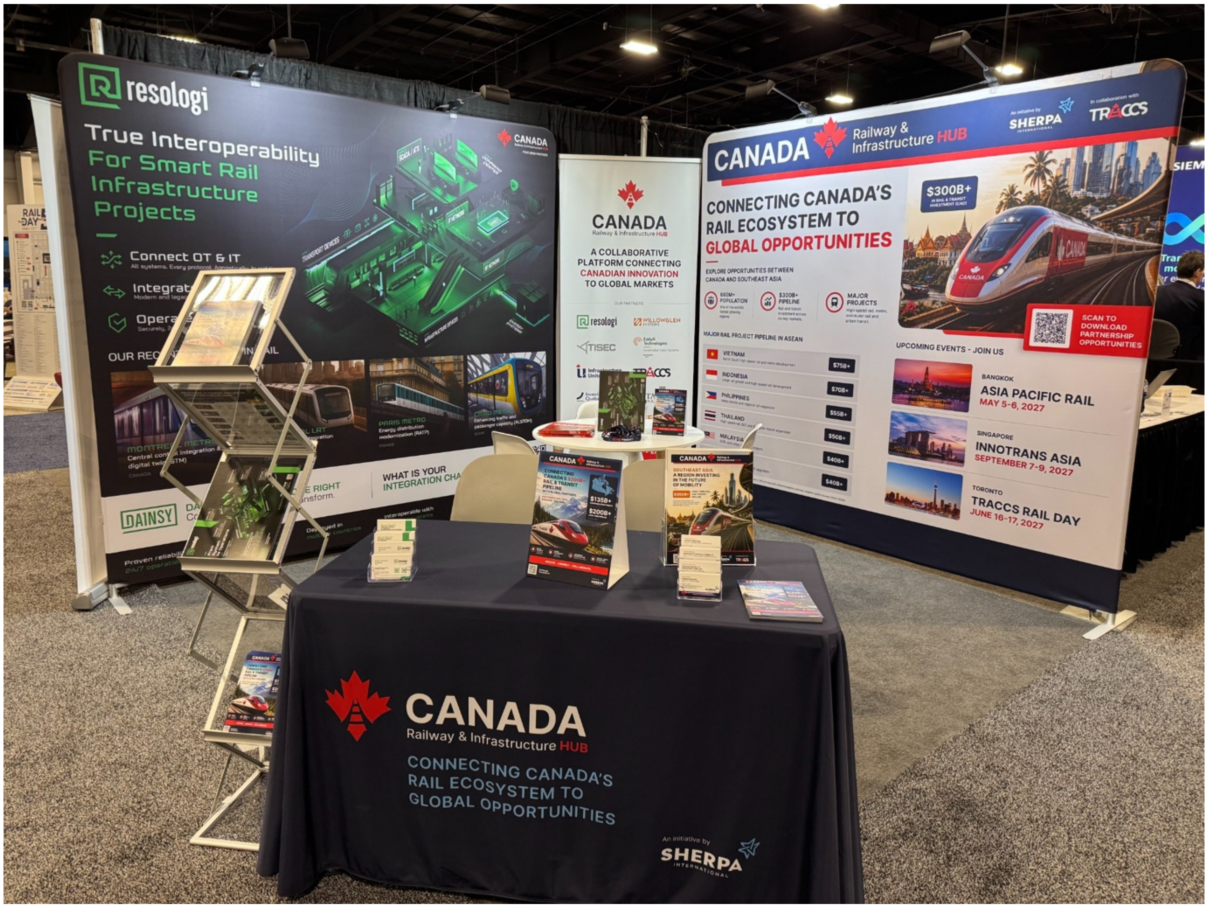
Meeting with RTRDA Executive Dr. Piang-Or Laohavilai and Canadian/international stakeholders at Asia Pacific Rail.

OEM and Tier-1 channels

Alstom and Hitachi Rail illustrate two different OEM channels for future follow-up. Alstom has a substantial operating presence in Thailand and an active relationship with Resologi, creating a practical route to test how Canadian technology and services can be integrated through an existing OEM relationship. Hitachi Rail’s APR presentation provided useful intelligence on digital asset management, condition monitoring, AI and data integration; any follow-up should be tied to specific Canadian capabilities and company-led use cases rather than treated as a generic Hub opportunity.

04 Toronto: TRACCS Rail Day and domestic validation

TRACCS Rail Day was the mirror of APR, the domestic counterpart to Bangkok. It tested whether the Hub remained useful when placed within Canada's own rail ecosystem. The activation generated operator visibility, supplier discussions, international market-entry conversations and deeper alignment with TRACCS.



Canada Railway & Infrastructure Hub and Resologi activation at TRACCS Rail Day 2026 in Toronto.

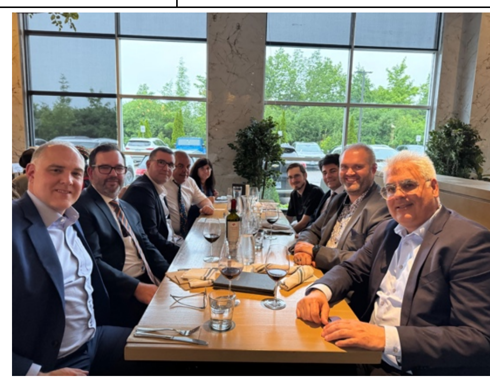
What Toronto validated

- The Hub could connect an international market-development story to Canada's project owners, suppliers and industry institutions.
- Specialized Canadian companies responded more positively than the largest global engineering firms.
- International firms already active in Canada still need support around partnerships, new provinces, project access and supply-chain integration.
- TRACCS has the sector legitimacy and convening platform to be a central partner in any broader international program; the appropriate governance, branding, roles and delivery model should be scoped jointly before 2027 commitments are made.
- The Toronto activation generated concrete follow-up with Willowglen, Resologi, Prelco/Beclawat, ApoSys, In a Blink, CAF and other firms.
- Interest to collaborate was also expressed by the Toronto Region Board of Trade and the Ontario Centre of Innovation, alongside consular, university/training and broader business-network participants.
- Several foreign companies—particularly German, Indian and U.S. suppliers—also approached the Hub to better understand Canadian market access, project positioning and partner requirements. These interactions should be treated as qualification opportunities rather than assumed FDI leads.

Selected opportunity signals

OPPORTUNITY	SIGNAL	DIRECTION
CAF / Eduardo Moya Baonza	Relationship developed across Abu Dhabi, Montréal, Madrid and Toronto; interest in Canada and ALTO; possible Canadian supplier partnerships.	Treat as a market-development and localization dialogue; coordinate with existing relationship owners and relevant provincial partners.
Metrolinx / Michael Lindsay	Senior project-owner relationship within Canada's largest regional rail transformation.	Maintain high-level operator engagement and widen the model to other transit authorities.
Transdev / Thierry Marguerite	Senior rail relationship tied to Ontario Line delivery.	Assess targeted supplier and technology introductions.
Prelco / Beclawat / Spencer Kull	Québec and Ontario supplier exploring rail, defence and international diversification.	Continue strategic growth and mission discussions.
Zöllner / Quentin Matthiesen	Specialized German rail-safety supplier strengthening its Canadian presence.	Currently focused on Ontario; qualify project fit and broader Canadian expansion needs if company interest develops.
Ciemmebi / Antonio Giordano	Italian/US supplier evaluating a Toronto opening, with Québec also potentially relevant.	Route to the appropriate market-entry and provincial partners after qualification.
Railmetrics / Eddyfi / Plasser	Expressed interest in future Hub participation before the business was acquired by Plasser.	Reconfirm interest and decision-making under the new ownership.
JR West Rail Tech – Canada–Japan technology collaboration	Following the APR connection, Tsuyoshi Tabuchi met with Resologi in Japan to explore combining JR West Rail Tech's railway hardware and maintenance expertise with Canadian software, data integration and digital capabilities.	Maintain the relationship, identify complementary Canadian partners and use cases, and pursue targeted follow-up with Canadian rail stakeholders and at InnoTrans.

TRACCS leaders Paul Murphy and Mark Salsberg with Ciaran Mullan and Martin Beaulieu at the Hub.



Working dinner with CAF, Willowglen, Resologi and Canada Hub participants.

An important segmentation effect

MARKET FIT IS NOT HUB DEMAND

WSP, Hatch, AtkinsRéalis and other large firms demonstrate the depth of Canada's rail ecosystem, but their engagement with the Hub has been limited. These organizations already possess global offices, regional business-development teams and established partnership channels. The strongest early value proposition appears to be for specialized and mid-sized firms, technology providers and companies entering new geographic markets.

TRACCS complementarity

TRACCS—the Transit Rail Association for Canadian Contractors, Maintainers, Operators and Standards—brings sector legitimacy, membership and convening power, and is itself showing growing international ambition. The 2026 pilot should therefore be treated as a proof point and a set of market assets that can inform a jointly scoped next phase—not as a parallel structure competing for the same industry space. Before 2027 commitments are made, TRACCS, the Hub/Sherpa and relevant public partners should jointly define governance, branding, relationship provenance and opportunity-routing principles, priority markets, funding and delivery responsibilities.

05 Independent ecosystem assessment

Independent research of the June 6, 2026 TRACCS Rail Day pre-event registration snapshot provides a useful test of the broader market thesis. It does not measure actual attendance, Hub engagement, willingness to pay or deal flow. It should therefore be read as an indicative addressable ecosystem—not demonstrated demand for the Hub. The registration snapshot included 2,404 individuals prior to the event, while TRACCS publicly projected approximately 5,000 attendees for Rail Day 2026. No official final attendance figure has subsequently been published, so the 5,000 figure should be treated as an organizer estimate rather than confirmed attendance.

METRIC	INTERPRETATION
2,404	Individual registration records in the snapshot
675	Distinct organizations after normalization
600	Commercial or commercial-candidate organizations
242	Organizations researched in depth (Tier 1)
166	Strong or Possible Hub characteristics (69 Strong + 97 Possible)
42	Canadian organizations with High or Medium export potential
109	Foreign organizations with High or Medium FDI/localization potential
≥105	Of those 109 already have an established Canadian presence

From ecosystem size to actionable opportunity

LENS	BASE	QUALIFIED SIGNAL	MORE SPECIFIC SIGNAL	WHAT IS STILL UNPROVEN
Canadian export lens	114 Canadian-headquartered Tier-1 organizations	42 High/Medium export potential	11 Canadian-headquartered organizations appear in the 32-company Strong ASEAN-fit cohort	Actual need for Hub support remains to be validated company by company.
Inbound / localization lens	128 foreign-headquartered Tier-1 organizations	109 High/Medium FDI/localization potential	≥105 of those 109 already have an established Canadian presence	**The actionable opportunity is additional provinces, capacity, localization and partnerships—not a greenfield headline.**

MARKET FIT ≠ HUB DEMAND

Market fit, export capacity and Hub demand are three different tests. A company can be highly capable internationally and still have little need for a collective market-access platform. Conversely, a specialized firm with a narrower global footprint may derive significant value from structured introductions, market intelligence and shared activation.

What the research supports—and what it does not

READING	CONCLUSION
Supported	Canada contains a broad rail and infrastructure ecosystem from which a recurring market-development platform could recruit selectively.
Supported	A verified core of 166 organizations has characteristics potentially relevant to future Hub activities.
Supported	Forty-two Canadian organizations demonstrate at least some export capability, although the strongest scores are concentrated among already-global firms.
Not supported	That 166 companies are potential participants, customers or sponsors of the Hub.
Not supported	That 109 foreign firms represent a large pool of new investors entering Canada for the first time.
Not supported	That pre-event registration proves actual attendance, near-term intent, willingness to pay or deal flow.

The export and ASEAN opportunity is selective

Only 32 of the 242 deeply researched organizations showed a Strong ASEAN/Southeast Asia fit, compared with 95 for the United States and 80 for Europe. Eleven of those 32 are Canadian-headquartered. This is not evidence that ASEAN is irrelevant; it shows that ASEAN is a selective market for a defined subset of the ecosystem. The Hub should recruit for fit, readiness and need for support rather than promote the region to the industry as a whole.

ILLUSTRATIVE COMPANY / SEGMENT	STRATEGIC READING
WSP Global	Strong theoretical ASEAN capability; limited Hub engagement to date.
Hatch	Strong theoretical ASEAN capability; limited Hub engagement to date.
AtkinsRéalis	Established international and Singapore activity; limited Hub engagement to date.
Stantec	International capacity; no demonstrated Hub demand.
EllisDon	Strong regional-market score; participation interest must be tested.
CPCS	Transport advisory with demonstrated international reach.
Willowglen Systems	High engagement with the Hub and active discussion of 2027 budgeting, despite a narrower documented ASEAN footprint.
Resologi	Active client work, regional relationship development and direct Hub participation; not part of the registration-based list used for every research score.
TISEC / specialized suppliers	Potentially relevant where certification, compliance or project fit is concrete; readiness must be qualified.

The full 32-company Strong ASEAN-fit cohort is retained in the underlying ecosystem research workbook and can be made available on demand. It should not be treated as a pre-qualified sales pipeline or as evidence of interest in the Canada Hub.

Inbound opportunity: expansion and localization, not a greenfield headline

The research identified 109 foreign-headquartered organizations with High or Medium FDI/localization potential, but at least 105—approximately 96%—already operate in Canada. The practical opportunity is therefore to help selected firms deepen their Canadian footprint, establish in additional provinces, add engineering or manufacturing capacity, build Canadian supply-chain partnerships, or connect existing Canadian operations to international opportunities.

OPPORTUNITY TYPE	DEFINITION
New market entry	A genuinely new Canadian foothold. The researched greenfield cohort was small and none was scored High/Medium.
Localization / expansion	New province, added operating capacity, engineering, manufacturing, maintenance or additional mandates.
Canadian partnership & supply-chain integration	Partnership with Canadian suppliers, integrators, operators, projects or institutions without assuming a new legal establishment.

Province-level mapping: useful, but not yet evidenced in the source research

The source workbook records Canadian presence largely as an establishment-level field rather than a complete province-by-province footprint. It therefore cannot yet support a reliable national localization map. The final report does not infer locations that were not documented. A province-level map would be valuable for Québec, Ontario and other jurisdictions, but it should be built only for a qualified shortlist of companies where expansion or localization is credible—not by blanket-classifying all 109 firms.

> PRACTICAL FDI LENS
>
> **A foreign firm already present in Ontario may still represent a Québec expansion opportunity; a firm with only sales representation may still represent deeper localization; and a company with substantial Canadian engineering or manufacturing capacity may be a partnership or export-channel prospect rather than an investment target.**

What this evidence means in practice

PARTNER LENS	PRACTICAL IMPLICATION
Export agencies / trade teams	Prioritize the small set where international capability, target-market fit and need for external support overlap. The 42 export-capable firms and 11 Canadian-headquartered Strong ASEAN-fit firms are starting populations—not participant counts.
FDI agencies	Treat "already in Canada" as the beginning of the analysis. Shortlisted firms should be mapped by province and by nature of footprint: sales, engineering, manufacturing, maintenance, project office or distribution.
TCS / EDC	Use the Hub as a qualification and routing layer: clarify the company objective, project relevance, local-partner need and commercial maturity before mobilizing public resources.
Industry / associations	Test willingness to participate, pay and commit staff. Registration intensity and theoretical fit are not substitutes for demand.

Evidence against overstatement

- 31% of the deeply researched cohort (76 of 242) showed Limited Hub fit.
- About 60% of commercial candidates (358 of 600) had only one registrant and received light-touch identification.
- The FDI headline substantially overstates genuinely new investment potential.
- The registration snapshot includes non-rail entries and data artifacts.
- Industry consolidation is active, so ownership and routing data will require periodic verification.

06 Opportunity portfolio and partner routing

The pilot's strongest output is not a long list of leads. It is a portfolio of relationships across project intelligence, operator access, certification, OEM channels, market activation and Canadian supplier development. The table below identifies the most actionable themes and the appropriate routing logic.

OPPORTUNITY	TYPE	VALUE	ROUTING
EECO / EEC infrastructure	Project intelligence	HSR, EECiti, industrial zones and infrastructure planning.	Hub/Sherpa + TCS Bangkok + provincial partners
RTRDA / local rail capability	Export / technology partnership	Certification, testing, training, transfer and supplier development.	Hub/Sherpa + TCS Bangkok + qualified suppliers
Arup APAC	Strategic engineering channel	Senior regional relationship; potential project and partner influence.	Hub/Sherpa + relevant public/company partners
RATP Dev Asia / Manila	Operator access	Regional operator/developer network and concrete Manila relationship.	Hub/Sherpa + TCS Singapore/Manila
Bureau Veritas	Export enablement	Certification and compliance pathways for selected products.	Participating companies + Hub/Sherpa
Alstom / Hitachi / OEM channels	Export / partnership	Potential integration of Canadian content into international bids and projects.	Company-led with Hub/TCS support
CAF	Localization / partnership	Canada and ALTO dialogue; potential Canadian supplier relationships.	Relationship owners + IQI/Ontario as appropriate
JR West / Tsuyoshi Tabuchi	Operator / innovation	Smart maintenance, CBM, data and potential package discussions with Resologi.	Resologi-led + TCS Japan
ST Engineering	Localization / reciprocal partnership	Existing Canadian presence; potential further Canadian expansion, localization and supply-chain dialogue.	Company/relationship owners + relevant provincial/TCS partners
TRACCS	Program platform	Canadian industry legitimacy, membership and convening power.	TRACCS + Hub/Sherpa
Willowglen / Prelco / specialized firms	Canadian growth	Strongest early evidence of Hub demand among specialized and mid-sized companies.	Company-led + Hub/Sherpa + relevant public partners

Priority relationship maintenance and market development

GEOGRAPHY	RELATIONSHIPS / SIGNALS	2026–27 PURPOSE
Singapore / APAC	TC Chew (Arup); Henri Pottier (RATP Dev Asia); Martin Dilly (Bureau Veritas); Joyce Sng (InnoTrans Asia); Jonathan Drape-Comyn / Terrapinn	Executive relationship maintenance; certification pathways; operator access; early 2027 activation scoping.
Thailand	EECO; RTRDA; BTS / Asia Era One; Alstom Thailand; Department of Rail Transport	Project intelligence; local-content strategy; operator/OEM pathways; follow-up on specific Canadian capabilities rather than general promotion.
Japan	Tsuyoshi Tabuchi / JR West Rail Tech; Sumitomo; Hitachi Rail relationships	Company-led continuity, technology partnership and Canada-facing business development; route through TCS/Japan where relevant.
India	Indian suppliers identified at APR/TRACCS; Canadian companies participating in upcoming market activity	Use 2026 activity to test standards, price competitiveness, partner quality and reciprocal market-entry hypotheses before treating India as a scaled Hub market.

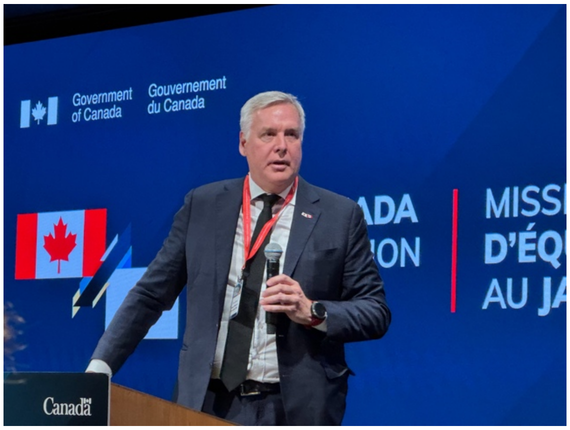
Routing principles

- Relationship origin should be respected and documented, while recognizing that qualified opportunities may appropriately involve multiple companies, provinces or public agencies.
- The Hub can identify, qualify and convene; public agencies retain their export and investment mandates.
- Operators and transit authorities should be engaged as sources of project need, procurement insight and credibility—not treated as sponsors by default.
- OEM opportunities should focus on supply-chain integration, technology partnership and project access rather than an unrealistic assumption that the Hub itself attracts major manufacturers.
- Each priority opportunity should have a clearly identified lead contact, documented next steps, and a shared understanding of which companies, provinces or public partners are actively engaged. Where mandates overlap or jurisdictions compete, coordination and transparency should take precedence over assigning a single “owner.”

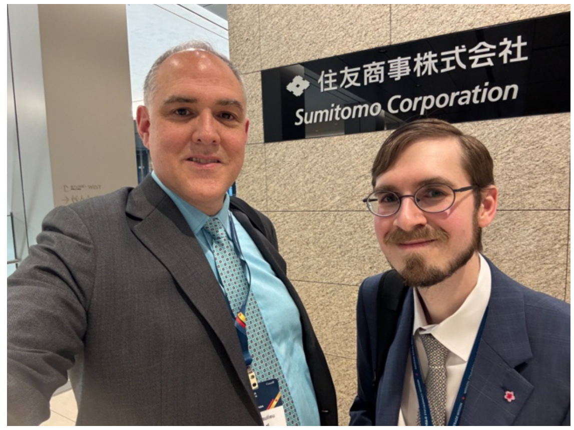
07 Japan continuity and communications

Team Canada Trade Mission to Japan

The June 22–26 mission was not part of the original Bangkok–Toronto pilot and was primarily a Resologi mission. It nevertheless extended selected relationships and provided a useful continuity test. The Hub concept was discussed with Deputy Minister of International Trade Glenn Purves, who requested more information and received the Hub booklet. Minister Maninder Sidhu was also informed of the initiative. Ariel Gamelin followed up with Tsuyoshi Tabuchi, now President and CEO of JR West Rail Tech, on a potential package approach combining Japanese hardware and expertise with Resologi software and services. Resologi also met Sumitomo Corporation, which is active in North America and seeking growth opportunities in Canada.



Deputy Minister Glenn Purves addressing Team Canada delegates in Tokyo.



Martin Beaulieu and Ariel Gamelin visiting Sumitomo Corporation during the Japan mission.

Communications and visibility

Communications extended the Hub beyond the booth by documenting the Canada–ASEAN proposition, partner participation, event activity and follow-up. The communications sequence helped build recognition around the initiative before, during and after Asia Pacific Rail and TRACCS Rail Day.

A separate Social Media Evidence Annex presents representative, attributable examples and explains the reporting methodology.

PRINCIPLE	APPLICATION
Use in the pilot	Built recognition, documented partner participation and reinforced a consistent Canada/rail narrative.
Evidence standard	Only content directly tied to the Canada Hub, Asia Pacific Rail, TRACCS Rail Day activation or clearly identified continuity should be included in Hub reporting.
Attribution discipline	General mission content, company-specific announcements or unrelated industry communications should not be counted as Hub performance unless the Hub is clearly part of the activity or message.
Future reporting	Separate paid from organic reach and record post URL, owner, date, theme, impressions, engagement and Hub attribution at the time of publication.

08 Resourcing, operating model and the 2027 path

The pilot was delivered with limited dedicated resources and significant in-kind delivery capacity. This is strategically relevant because the product is not exhibition space alone. It includes market research, intelligence, participant recruitment, briefing, stakeholder qualification, meeting preparation, partner coordination, communications, CRM, travel, follow-up and reporting.

The 2026 economics were intentionally those of a pilot and should not be considered a sustainable pricing or delivery benchmark. Expanding the number of activations without adequately funding the work behind them would reduce execution quality and recreate several of the coordination constraints experienced during the pilot.

FUNDING PRINCIPLE

A second phase should proceed only with a funded delivery model that reflects the actual service intensity of the platform. Future company and partner contributions should support preparation, qualification, meeting development, CRM, follow-up and reporting—not simply exhibition space. Participant revenue, sponsorship and public cost-sharing may all form part of the model, but the program should be resourced on a sustainable basis rather than depend on exceptional in-kind contributions.

What a scalable program requires

RESOURCE	WHY IT IS REQUIRED
Program leadership and governance	Define roles, partner decisions, brand use, relationship provenance, opportunity-routing principles and priority markets.
Market and project intelligence	Maintain Canadian and international opportunity themes and identify concrete entry points.
Business development and meetings	Qualify companies, recruit the right participants, prepare introductions and manage follow-up.
Communications and design	Maintain the market narrative, booklet, digital assets and partner visibility.
CRM and reporting	Preserve relationship intelligence, assign owners and track results.
Travel and market activation	Support relationship-driven activity in selected markets.
Specialist capacity	Add certification, procurement, engineering, policy, media or regional expertise only when required.

Capabilities to combine in a jointly scoped model

PARTNER / CAPABILITY	CONTRIBUTION TO A JOINTLY SCOPED MODEL
TRACCS	Industry convening, member engagement, standards, sector priorities, communications and growing international initiatives.
Canada Hub / Sherpa	Existing pilot assets, market intelligence, international relationships, project framing, activation experience and delivery capacity.
Public partners	Export, investment, financing, diplomatic access and market intelligence within their formal mandates.
Participating companies	Commercial objectives, technical capabilities, market priorities, follow-up ownership, staff commitment and co-funding.
Operators / authorities	Project needs, procurement insight, validation and participation where relevant.

The governance and commercial model should be negotiated rather than assumed. The objective is to combine complementary capabilities while avoiding brand overlap, duplicated outreach or ambiguity around relationship provenance, partner roles and opportunity routing. Additional provincial and regional partners can be incorporated where qualified companies, projects or market opportunities justify their participation.

Exploratory digital layer — not yet validated

The pilot also surfaced a longer-term opportunity to explore digital tools for supplier discovery, capability profiling, opportunity matching, certification and market-entry information, and eventually broader trade-enablement functions. This remains an industry-discovery hypothesis, not a current Hub product. Any digital layer should first be validated with operators, procurement teams, OEMs, suppliers, industry associations and public partners before platform development or technology commitments are made.

2027 pathway

TIMING	ACTIVITY	DECISION / PURPOSE
Aug. 2026	Company-level India continuity	Resologi training activity with Alstom in Bengaluru provides market learning; it is not counted as a Hub mandate.
Sept. 22–25, 2026	InnoTrans Berlin	Maintain industry relationships, observe Canadian/international participation and test 2027 company interest; no formal Hub activation unless separately defined.
Oct. 12–17, 2026	Team Canada Trade Mission — India	Test outbound price/market fit and qualify inbound Indian supplier interest against Canadian standards and partner requirements.
Q3–Q4 2026	Program definition	Scope the 2027 operating model with TRACCS, participating companies and public partners; select a limited number of markets and opportunity themes; define governance, delivery requirements and indicative program economics.
Fall 2026	Demand validation	Interview or survey selected high-fit firms; test willingness to participate, pay and commit staff to follow-up.
Sept.–Nov. 2026	Public-partner budget alignment and funding discussions	Present pilot findings and the proposed 2027 program to federal and provincial partners while their upcoming-year budgets and international priorities are being developed. Define where institutional participation, program funding, cost-sharing or in-kind support may be appropriate before 2027 commitments are made.
Early 2027	Recruitment and meeting design	Recruit a small cohort based on market fit, readiness and need; build meeting agendas before exhibition commitments.
May 5–6, 2027	Asia Pacific Rail — Bangkok	Return only with a qualified cohort, project themes, meeting program and institutional follow-up plan.
June 16–17, 2027	TRACCS Rail Day — Toronto	Connect inbound/outbound opportunities to the Canadian supplier and operator ecosystem.
Sept. 7–9, 2027	InnoTrans Asia — Singapore	Use Singapore as a technology, operator and partnership gateway if qualified demand and partner support are confirmed.

CANADIAN PRESENCE VS. PAVILION

The pilot does not yet justify assuming a large standing Canadian pavilion at APR, InnoTrans Asia or other international events.
It does justify testing whether a targeted, project-led Canadian presence can be built around a qualified company cohort, pre-arranged meetings and coordinated public-partner participation. Pavilion scale should follow validated demand—not precede it.

Go / no-go conditions

DECISION	CONDITION
Proceed	A sustainable delivery model is funded; partner roles, governance and opportunity-routing principles are clear; a qualified company cohort commits; priority meetings and opportunity themes can be developed; and partners agree on a common measurement framework.
Re-scope	Interest exists, but company readiness, willingness to participate or pay, institutional capacity, or available funding is insufficient for a full activation; use a lighter briefing, targeted mission, shared market presence or other lower-cost model.
Do not scale	The operating model remains dependent on exceptional in-kind effort; event commitments are made before company demand is qualified; or no sufficiently credible opportunity themes, participating companies and follow-up capacity can be identified.

Performance measures

- Qualified companies recruited and retained;
- Priority meetings completed with relevant decision-makers, operators, partners or project stakeholders;
- Qualified opportunities identified and routed to the appropriate companies and public partners;
- Follow-ups progressing to pilots, partnerships, proposals, mandates, market-entry actions, investment discussions or other measurable next steps;
- Repeat participation, company satisfaction and demonstrated willingness to contribute financially;
- Public-partner value, including actionable market intelligence, export pathways and qualified localization/investment opportunities;
- Quality and progression of relationships over time, not simply the number of contacts generated;
- Communications performance separated into paid, organic and clearly Hub-attributable reach.

Strategic risks and responses

RISK	RESPONSE
Overlap with TRACCS and other industry initiatives	Jointly scope governance, branding, complementary roles, relationship provenance, opportunity routing, priority markets and delivery responsibilities before 2027 external commitments.
Too many markets	Concentrate on a limited number of activations supported by qualified companies, credible opportunity themes and existing relationships.
Event-centric model	Treat exhibitions as activation points rather than the product itself; the core value is market intelligence, qualification, access, meetings and follow-up.
Overstated FDI thesis	Distinguish new market entry from provincial expansion, deeper localization and Canadian partnership/supply-chain opportunities; verify existing Canadian and provincial footprints before classifying opportunities.
Under-resourcing	Establish a funded operating model and realistic delivery capacity before increasing the number of partners, companies, markets or reporting commitments.
Opportunity-routing ambiguity	Document relationship provenance, active partners, status, next action and routing in the master contact workbook; coordinate transparently where mandates or jurisdictions overlap.
Market fit mistaken for Hub demand	Do not assume that internationally capable companies require Hub services. Validate company need, readiness, willingness to participate and willingness to pay before using addressable-ecosystem analysis to justify program scale.
Data ageing	Reconfirm ownership, roles, contact details, Canadian presence and current market interest before outreach or opportunity classification.

Conclusion

The 2026 Canada Railway & Infrastructure Hub achieved its core purpose: it tested whether a coordinated Canadian rail and infrastructure platform could create a stronger market narrative, senior relationships and credible opportunity signals across international and domestic markets.

The evidence supports continuation—but not automatic scale. Bangkok demonstrated that selected Canadian companies can gain value from being connected to institutional, operator and industry counterparties in Southeast Asia. Toronto confirmed the breadth of Canada's rail ecosystem while also showing that the most responsive segment is likely to be specialized and mid-sized companies, technology providers and firms entering new markets rather than Canada's largest global engineering groups. Independent research confirmed a selective but meaningful addressable ecosystem, refined the inbound opportunity from greenfield FDI toward localization, expansion and Canadian partnerships, and reinforced that registration and market fit should not be confused with demonstrated demand.

For public and industry partners, the next decision is therefore not whether to endorse a large national rail program. It is whether a disciplined second validation phase can assemble a qualified company cohort, generate actionable export and localization opportunities, secure sufficient partner and company commitment, and demonstrate a sustainable delivery model.

FINAL ASSESSMENT

The Canada Hub is best understood as a proof-tested market-development platform at the beginning of a validation cycle. Its next phase should be selective, properly resourced, supported by clear governance and partner roles, and measured by qualified access, opportunity progression, partnerships, mandates and repeat company demand—not by the number of logos, registrations or booth visitors.

Senior APAC engagement at the Canada Hub with TC Chew, Arup, and Canadian partners.

Supporting deliverables

DELIVERABLE	ROLE
2 - Canada Hub 2026 Photo Evidence Annex	Visual record of APR, EECO, RTRDA/JR West, TRACCS and Japan continuity.
3 - Canada Hub 2026 Social Media Evidence Annex	Representative attributable communications evidence and reporting rules.
4 - Canada Hub Contacts Master – Final	200 sorted contact records, event-specific sheets and a curated priority follow-up register.
5 - Canada Rail & Infrastructure Projects Booklet — 2026	First market-facing inventory of major Canadian projects and ecosystem participants; candidate for a maintained digital asset.
TRACCS Rail Day Ecosystem Analysis + Master Table	*Independent analysis of the June 6 pre-event registration snapshot used to test the size and characteristics of the addressable ecosystem. Underlying master table available on demand.*