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PROCUREMENT INTELLIGENCE BRIEFING

Stantec and Canada's Defence and Public Infrastructure

A deep read on Defence Construction Canada, the national incumbent landscape, the buyers and relationships that decide this work, and the accounts Meridian Strategies will open on Stantec's behalf.

Prepared for: Stantec

By: Meridian Strategies

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The defence estate is the prize. Stantec is already inside it.

Stantec is one of Canada's largest and most active public-sector architecture and engineering firms, with **3,074 visible awards** across the country. The single largest and fastest-growing pool of work it competes for is the federal defence estate, procured through **Defence Construction Canada (DCC)**. Stantec already ranks **#3 among A and E firms at DCC**. The opportunity is not to enter. It is to convert a strong national position into a far larger share of a defence recapitalization that is only beginning.

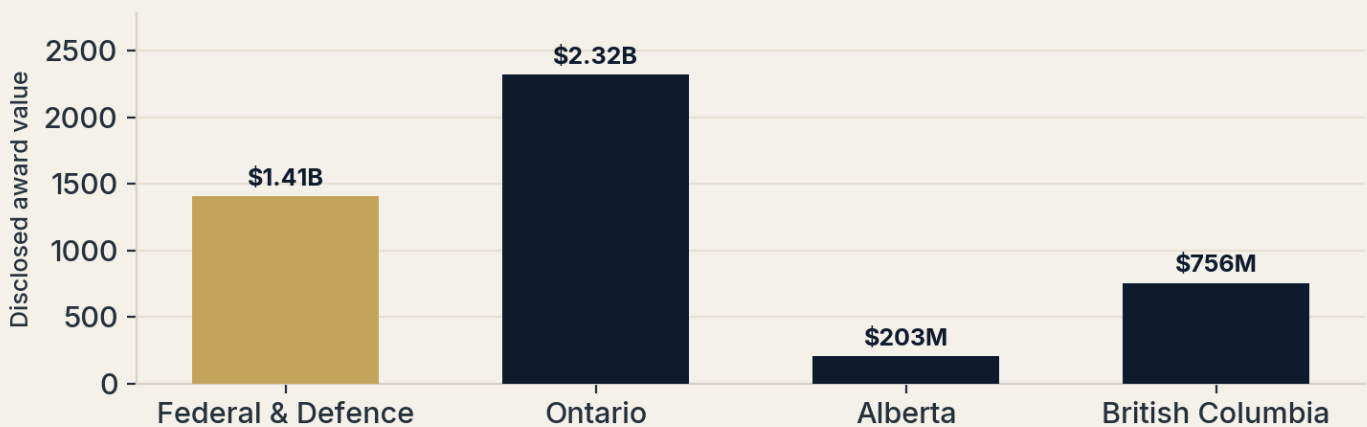


- **A deep, recurring book.** \$4.68B of visible in-scope A and E awards (2015 to 2025, a floor); federal and defence is the largest jurisdiction at \$1.41B, roughly 30 percent of the total.
- **DCC is the centre of gravity.** DCC alone has placed 7,682 awards worth \$4.04B (2015 to 2025), and its published forward program is \$40B+ across 141 major projects, with about \$6.39B forecast over the next three years across 32 installations.
- **Stantec is positioned, not absent.** Already #3 at DCC and present in every region; the work is fragmented across regional specialists, which is exactly the structure a national prime can consolidate.
- **The recommendation.** Defend and expand where Stantec is strong (Quebec, the West), backfill the open North through partnership, and concentrate on the large capital projects, not the low-dollar task work, where Stantec's scale and discipline depth win.

THE MARKET

A \$4.68B market, led by federal and defence

Stantec competes for the architecture, engineering, environmental, and advisory work behind Canada's public infrastructure: the design, planning, and delivery that federal, defence, and provincial buyers procure. Across the federal estate plus Ontario, Alberta, and British Columbia, that is **\$4.68B of visible awards across 8,313 contracts (2015 to 2025)**, with only 4,529 disclosing a dollar figure, so true spend is materially higher.



Disclosed advisory award value by jurisdiction, 2015 to 2025, amendment rows removed. **Federal and defence is the single largest pool by dollars.**

Stantec's national footprint

Why this is a floor

Region	Visible wins	Counts are awards visible in public procurement records, with amendment rows and multi-firm roster or prequalification lists removed. They understate the true total: much design work is bundled into design-build, P3, and construction-management contracts that never post as a standalone advisory tender, and a large share of federal and defence work flows through standing offers, supply arrangements, and source lists that disclose at the vehicle level, not per award.
Quebec	1,389	
Ontario	460	
Alberta	291	
British Columbia	246	
National total	3,074	

THE TRACK RECORD

What Stantec already wins, and where it can grow

Stantec's public-sector record spans the full range of the work, from large transmission and bridge programs to municipal water, transit, and federal advisory. These visible marquee awards are the reference accounts a government-relations campaign builds on, and the proof points it carries into every new room.

Year	Buyer	Assignment	Value
2024	British Columbia Hydro and Power Auth...	T&D Engineering and Project Delivery Services	\$294M
2021	Public Procurement Agency	NL Bridge Management System Maintenance and Support	\$221M
2025	Region of Peel	Consulting Engineering Services for the South Caledon...	\$77M
2025	City of Mississauga	Detailed Design and Contract Administration Services...	\$42M
2022	City of Barrie	Integrated Project Delivery Team - Prime Consultant for...	\$29M
2023	SQI-Direction Gestion de projets Oues...	Services professionnels en génie civil et génie...	\$25M

A selection of Stantec's largest visible public-sector awards, 2015 to 2025 (disclosed value, a floor). The breadth is the point: power transmission, bridges, water and wastewater, transit, and Quebec civil and structural. Stantec competes across every discipline and jurisdiction in scope.

Reference accounts are leverage. Each of these is a credibility anchor with a specific buyer and an adjacency to win next. The campaign turns a delivered project into a relationship, a renewal, and an introduction to the buyer down the hall.

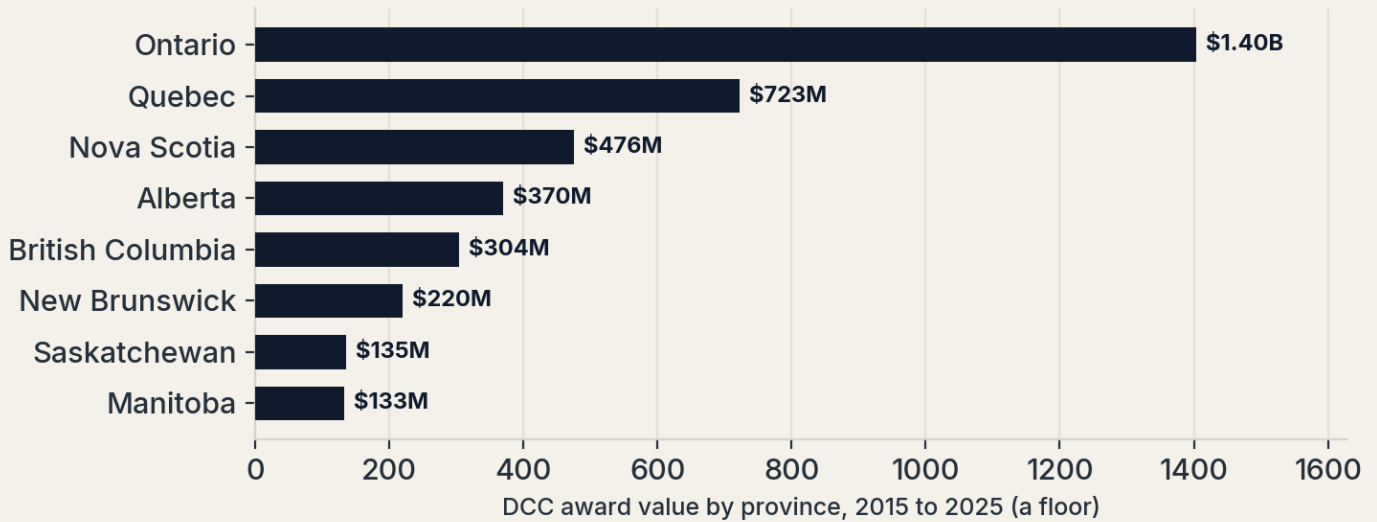
DEFENCE CONSTRUCTION CANADA

The single biggest opportunity, and how it is bought

Defence Construction Canada is the Crown corporation that procures and delivers infrastructure for National Defence. The Department of National Defence buys almost no infrastructure directly: it builds through DCC and, for some real property, PSPC. DCC has placed **7,682 awards worth \$4.04B since 2015** across roughly 40 installations nationwide. For an architecture and engineering firm, understanding how DCC buys is the difference between chasing tenders and shaping them.

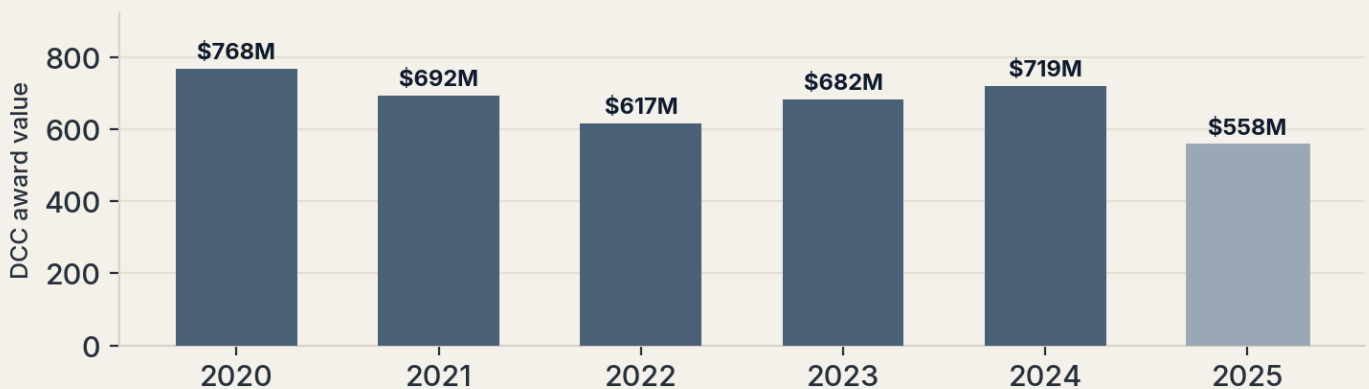
How DCC procures, and why most of it is invisible. A large share of DCC work never appears as a discrete, openly competed contract. It flows through **standing offers, supply arrangements, source lists, and prequalification vehicles**: once a firm is on the list, it wins task orders by internal assignment, not by tender. Large capital projects are awarded in design phases, often years before construction. The practical consequence is that the roster and the relationship are the real selection mechanism, and positioning happens well before anything is posted. This is precisely where a dedicated government-relations and intelligence capability changes the odds.

DCC demand by province



DCC award value by province, 2015 to 2025 (a floor). Ontario (the National Capital Region and army bases), Quebec (Valcartier, Bagotville), and Nova Scotia (the Halifax naval estate) carry the most DCC dollars, but every province has a defence footprint.

A steady, recurring book



DCC award value by year. Volume has held in a steady band; the 2025 bar is a partial year still being recorded. DCC is a recurring book of work, not a one-time spike, and the forward program points up.

WHAT IS COMING

The forward program: \$40B+ and recapitalizing

Beyond what has been awarded, DCC's published forward capital program is **\$40B+ across 141 major projects** (28 in active procurement, 88 in pre-procurement, 25 planned), with roughly **\$6.39B forecast over the next three years across 32 installations**. The driver is a sustained defence recapitalization, consistent with Canada's stated path toward the NATO two-percent-of-GDP commitment, flowing into real property: jetties, hangars, training and health facilities, energy systems, and northern basing.

Four programs concentrate the dollars

Capital cluster	Scale	What it is
Naval recapitalization	~\$9.7B	Esquimalt and Halifax jetties, dry-dock and fleet-support modernization on both coasts.
Northern Basing Initiative	~\$7.5B	Arctic hangars, runways, fuel storage and operations facilities (Goose Bay, Yellowknife, Inuvik, Iqaluit, Alert). Indigenous and northern partnership effectively mandatory.
F-35 fighter basing	\$1B+	Hangars, maintenance, power and airfield infrastructure at Cold Lake and Bagotville.
Strategic Tanker Transport	\$1B+	Hangars, fuelling depots and runway expansion concentrated at 8 Wing Trenton.

The 141 projects, by type

Stantec's fit

Sector	Projects	
Hangars	15	The clusters map onto Stantec's multi-discipline strengths: naval (marine and water), northern basing (remote delivery and energy), F-35 fighter (power-grid modernization and airfield works), and strategic tanker (fuel systems and utilities). A national prime with Stantec's breadth can credibly lead on two or three of these at once, where a single-discipline or regional firm cannot.
Utilities (power, fuel, water)	15	
Training facilities	14	
Jetties and marine	12	
Housing and accommodation	12	
Other facilities	73	

Source: Defence Construction Canada published forward capital program and Industry Day briefing material. These are forward-looking planning figures, not awarded contracts, and are shown separately from the award data above.

Where the defence dollars are going

The forward program lands at specific installations. The twelve below carry the largest three-year forecasts, each with a flagship project that defines its near-term procurement. This is the map Stantec's pursuit teams should be working now, well ahead of the tenders.

Installation	Prov	3-yr forecast	Flagship project and scope	Project size
5 CDSB Gagetown	NB	\$557M	Road and training-network recapitalization (>\$1B); water supply	>\$1B
CFB Esquimalt	BC	\$496M	Rocky Point Jetty; Fleet Diving Unit; dockyard recapitalization	\$500M to \$1B
NCR / Ottawa	ON	\$487M	DRDC laboratory; National Defence Secure Campus	>\$1B
Garrison Valcartier	QC	\$342M	Water and wastewater recapitalization; telecom network	\$25M to \$150M
CFB Petawawa	ON	\$338M	427 Squadron hangar; special-operations training centre	\$500M to \$1B
CFB Kingston	ON	\$290M	Strategic radio capability; signals and training facilities	\$150M to \$500M
CFB Halifax	NS	\$286M	Jetty NH construction; Halifax heating district-energy upgrade	\$500M to \$1B
North Warning System	North	\$232M	Arctic surveillance recapitalization	\$150M to \$500M
19 Wing Comox	BC	\$204M	Canadian Multi-Mission Aircraft hangar; simulator	\$150M to \$500M
CFS Yellowknife	NT	\$196M	Northern operations and fuel; hangar upgrades	\$150M to \$500M
4 Wing Cold Lake	AB	\$160M	F-35 fighter hangars and training; power-grid modernization	\$500M to \$1B
14 Wing Greenwood	NS	\$151M	Canadian Multi-Mission Aircraft hangar; training	\$150M to \$500M

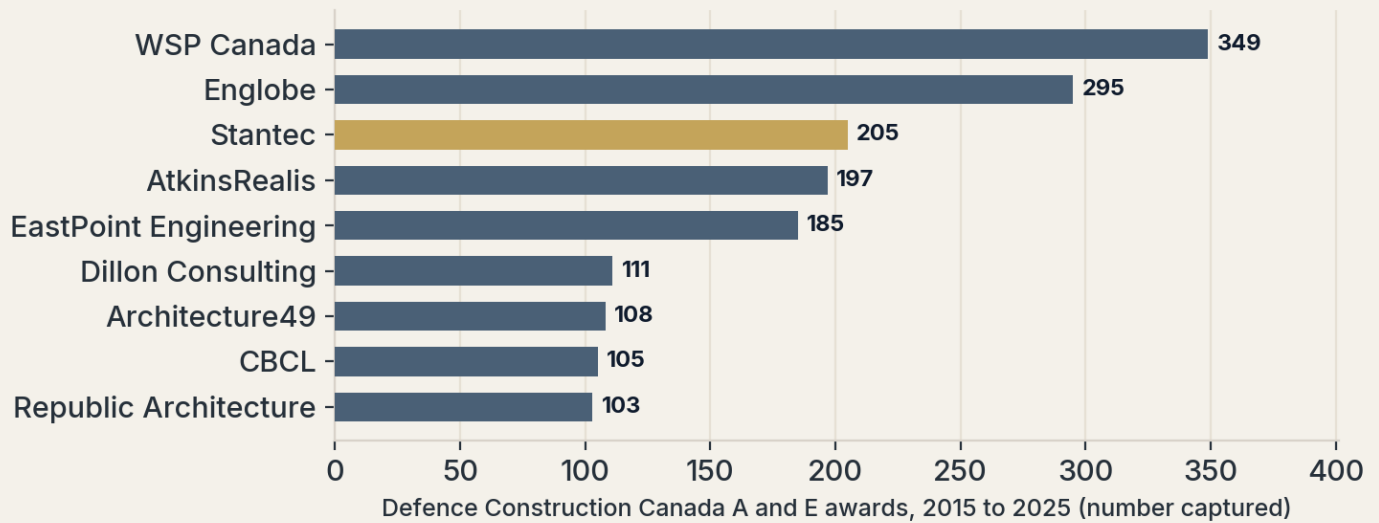
Source: DCC published forward program (FY2026 to FY2029 forecast across 32 installations; forward-looking, not awarded). The full installation list is in the appendix.

The wedge. Every one of these was knowable before it posted. The 427 Squadron hangar at Petawawa and the F-35 works at Cold Lake are in active procurement now; the Esquimalt and Halifax jetties and the entire Northern Basing Initiative are pre-procurement, with design awards staged across the next several years. A standing intelligence capability surfaces the budget line and the decision-maker months ahead, so Stantec shapes the scope and arrives as the expected bidder.

WHO HOLDS THE DEFENCE ESTATE TODAY

The DCC incumbent map

The A and E field at DCC is led by the national multidisciplinary firms, with Stantec already among them. No single firm dominates: incumbency is concentrated in low-dollar task work and is fragmented region by region. That fragmentation is the opening for a national prime.



Most active architecture and engineering firms at Defence Construction Canada by number of captured awards, 2015 to 2025 (a floor), vendor names consolidated. Stantec ranks #3 with 205 captured DCC awards, behind WSP Canada (349) and Englobe (295).

Who leads, region by region

Region	Most active A&E firms	Where Stantec sits
Pacific (BC)	WSP (geotechnical, Esquimalt), AECOM, AtkinsRealis	Stantec present; WSP holds the geotechnical lead
Western (AB / SK)	Stantec, EastPoint, AECOM, Englobe	Stantec already among the leaders
Ontario	AtkinsRealis (airfield and pavement), Jp2g (Petawawa), WSP	Local incumbency at army bases
Quebec	Englobe (Valcartier), CIMA+, Stantec Experts-conseils	French-language delivery required; Stantec present via Experts-conseils
Atlantic (NS / NB)	AECOM, AtkinsRealis, CBCL, EastPoint, Architecture49	Volume held by Atlantic task-work specialists
North (territories)	Thin: Stantec, WSP, EXP	Wide open; about \$3.5M in current awards against a multi-billion pipeline

Observed leadership in DCC award records, consolidated across entity variants. Regional incumbency is held through local presence and past performance, which is what a national entrant most needs to borrow through partnership.

THE WIDER FEDERAL ESTATE

Beyond DCC: the rest of the federal buyers

DCC is the defence procurement arm, but it is not the whole federal opportunity. The single largest federal buyer of architecture and engineering services in scope is **Public Services and Procurement Canada (PSPC)**, which procures real property for the entire federal estate, well beyond defence. The in-scope federal A and E buyers outside DCC are below.

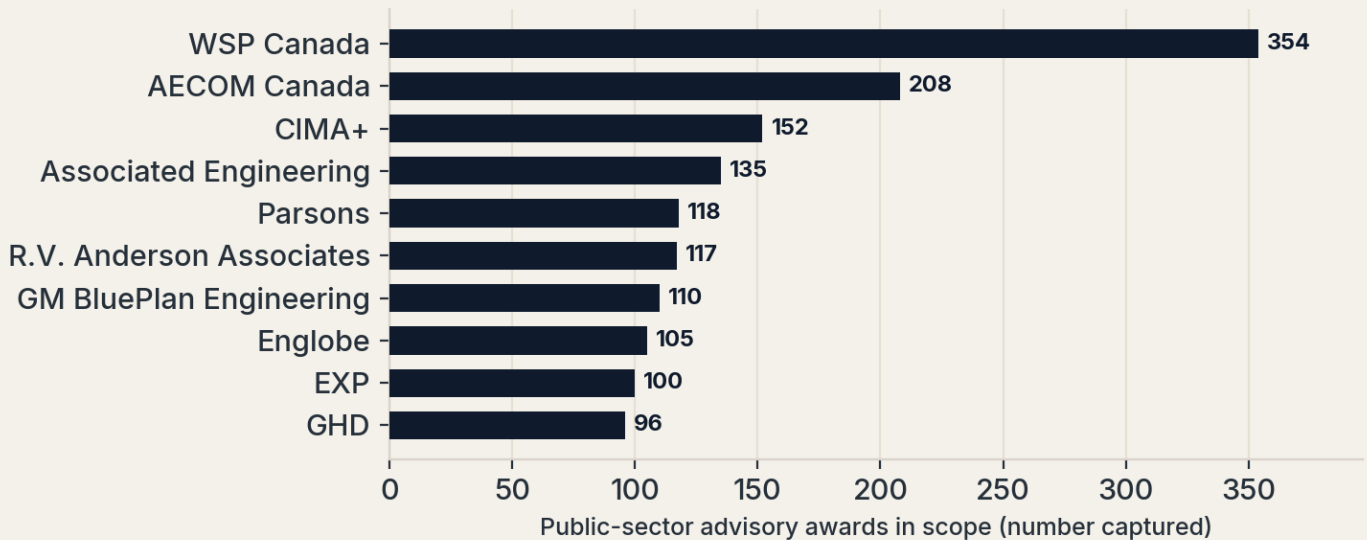
Federal buyer	Visible awards	Visible value
PSPC	991	\$754M
Parks Canada	78	\$226M
Shared Services Canada	21	\$139M
RCMP	34	\$25M
Indigenous Services Canada	6	\$19M
National Defence (DND)	39	\$14M
Fisheries and Oceans Canada	45	\$8M

In-scope A and E awards by federal buyer outside Defence Construction Canada, 2015 to 2025 (a floor). PSPC dwarfs the rest: it is the federal government's real-property landlord and the most important single federal relationship after DCC. Parks Canada, Shared Services Canada, the RCMP, and Indigenous Services each run their own recurring A and E books.

THE NATIONAL FIELD

Who Stantec competes against, coast to coast

Beyond defence, the same multidisciplinary firms recur across federal, provincial, and municipal buyers. The chart shows the most active firms across the in-scope market; Stantec's record is carried separately because it is captured by a different method.



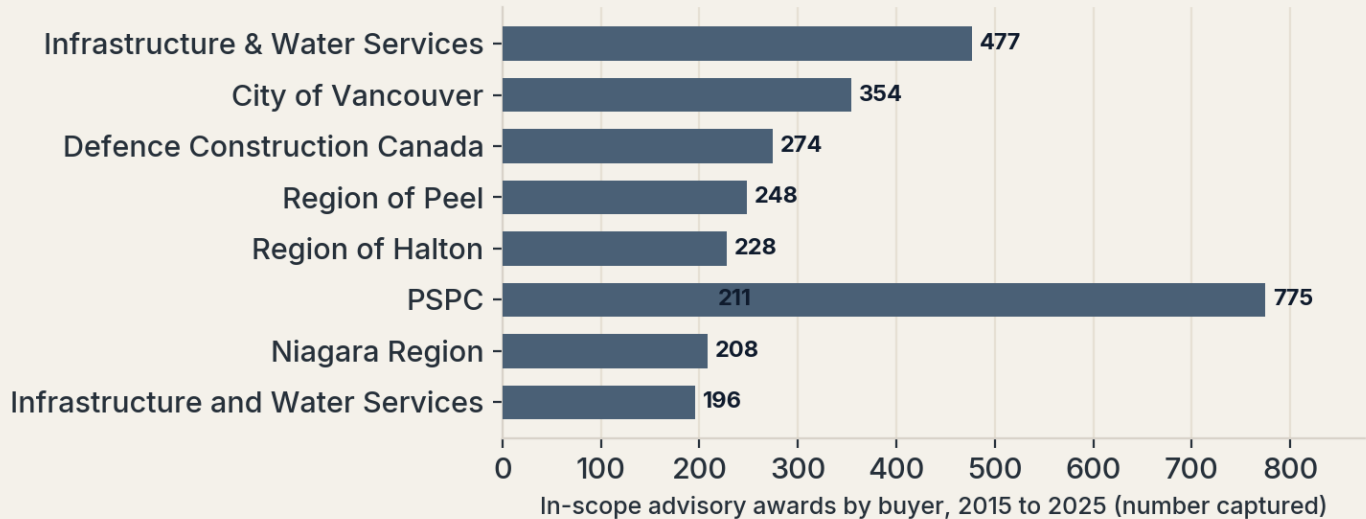
Most active firms across the in-scope public-sector advisory market by number of awards, 2015 to 2025 (a floor), names consolidated. Stantec is held off this chart by design: its firm-name win count is not directly comparable to the field, so plotting it would mislead.

Where Stantec sits. Stantec's **3,074 visible national wins** place it firmly in the top tier alongside WSP Canada and AECOM. The task is not entry, it is share, and in this market share is decided through early positioning and standing relationships well before the tender posts. The relationships are the asset.

THE BUYERS AND THE RELATIONSHIPS

The accounts that drive the market

Demand concentrates in a recognizable set of repeat buyers. The federal and defence estate (PSPC and DCC) is the single largest concentration; provincial infrastructure and water departments and the large municipalities are the recurring provincial anchors. These are the relationships Meridian builds and maintains on Stantec's behalf.



Most active in-scope buyers by number of awards, 2015 to 2025. The pattern is consistent with the defence thesis: federal procurement arms sit at the top, alongside the provincial water and infrastructure programs and the largest municipalities.

Relationships compound. In this market a firm that is known to a buyer, qualified on its vehicles, and present when scopes are written wins disproportionately. Stantec's existing footprint with these buyers is a defensible base; the work is to deepen it where Stantec is strong and open the doors where it is not.

OPEN NOW, WORTH PURSUING

A focused read on what is live today

Not an exhaustive list. A short, curated set of larger, relevant opportunities open now with real runway, defence and federal first, then provincial. The full, filterable pipeline of 555 live opportunities updates daily in the portal.

Federal and defence

Closes	Left	Buyer	Opportunity
2026-08-31	75d	Defence Construction Canada - Atlantic...	APN - Health Services Centre And Transition Centre, CFB Halifax, Nova Scotia
2026-07-21	34d	Defence Construction Canada	Architectural and Engineering Services – Source List
2026-07-07	20d	Public Services and Procurement Canada	Geotechnical Investigation - Saint John Ferry Terminal
2026-07-02	15d	Defence Construction Canada - Western...	APN Construction Management Services For Wainwright Base Program CFB Wainwright

Provincial (Ontario, Alberta, British Columbia)

Closes	Left	Buyer	Opportunity
2027-12-31	562d	City of Greater Sudbury	Request for Prequalification (RFPQ) for Various Water/Wastewater 2024-2027 Capital
2027-05-31	348d	City of London	2024-815 Consulting Engineering Services for City of London Stormwater Management
2027-01-29	226d	Greater Vancouver Regional District	Drinking Water Treatment Residuals Management
2026-12-30	196d	Claystone Waste Ltd	Claystone Waste Ltd. - Pre-qualification Request - Engineering Services
2026-11-30	166d	City of London	- Prequalification for Consulting Engineering Services for Transportation

The renewal radar: incumbent contracts coming up

The highest-value opportunities are often not new tenders but renewals: large assignments whose current term is ending, where the incumbent must re-compete and the door opens. These in-scope contracts expire within the next 24 months. Each is a displacement target Meridian tracks so Stantec is positioned before the re-tender posts.

Term ends	Current incumbent	Buyer	Assignment	Value
2026-12-31	Zeidler Architecture Inc.	PSPC	Block 2 Architectural and Engineering Services	\$102M
2026-07-31	WSP Canada	PSPC	Highway and Bridge Engineering Services...	\$14M
2026-07-31	Tetra Tech	PSPC	Highway and Bridge Engineering Services...	\$10M
2028-03-31	AECOM Canada	Parks Canada	Civil Engineering and Prime Consultant...	\$10M
2028-03-28	Montgomery Sisam Architects Inc.	Plexxus	North York General Hospital - Architectural...	\$8M
2028-03-31	McElhanney	Parks Canada	Civil Engineering and Prime Consultant...	\$6M
2026-07-31	AECOM Canada	PSPC	Highway and Bridge Engineering Services...	\$6M

In-scope advisory contracts with a recorded end date within 24 months, by disclosed value (a floor; only a minority of awards record an end date, so the true renewal pipeline is larger). The incumbents here, WSP, Tetra Tech, AECOM, and others, are precisely the firms Stantec competes against; a renewal is the cleanest moment to take share.

Renewals beat cold tenders. The buyer already needs the work, the scope is known, and the only question is who delivers it next. Positioning twelve to eighteen months ahead of a renewal, while the incumbent is still mid-term, is where a relationship and early intelligence decide the outcome.

WHERE TO POINT MERIDIAN

Target accounts and the path to share

- 1. Defence Construction Canada and PSPC.** The largest, fastest-growing pool. Stantec is already #3 at DCC; the objective is to move up as the estate recapitalizes. Secure and defend positions on the source lists, supply arrangements, and prequalification vehicles that govern this work, region by region.
- 2. The capital clusters, not the task work.** Concentrate on the large projects in naval, northern basing, F-35 fighter, and strategic tanker, where Stantec's scale and discipline depth win. Cede the low-dollar base-condition assessments to regional specialists.
- 3. The open North.** The Northern Basing Initiative is a multi-billion pipeline against roughly \$3.5M of current awards. Northern and Indigenous partnership is effectively mandatory and is the single most important relationship to build first; later movers are locked out.
- 4. Provincial infrastructure and water programs.** The recurring provincial anchors in Alberta, BC, and Ontario; map renewals before they post.

5. **The large municipalities** on the buyers chart (City of Vancouver, Region of Peel, Region of Halton and peers): repeat buyers of design and engineering services, several on competitor contracts approaching renewal.
6. **Protect and expand the incumbent base.** Use Stantec's 3,074 visible wins as reference accounts to defend positions at renewal and expand into adjacent buyers and jurisdictions.

How to talk about market size

The \$4.68B figure is visible, disclosed, amendment-stripped award value, and a floor. Real category spend is larger because design work is bundled into design-build and P3 contracts that never post as advisory tenders; because federal and defence work flows through standing offers and source lists that disclose at the vehicle level; and because only 4,529 of 8,313 captured awards publish a dollar figure. Add the \$40B+ DCC forward program on top. State the visible floor, name the invisible channels, and let the buyer infer the rest.

THE CONVERSATIONS TO HAVE

What the data says, what it does not, and what to ask

Intelligence is a starting point, not an answer. For each priority account, the award data tells us a great deal, leaves real gaps, and points to the specific questions Meridian takes into the room on Stantec's behalf.

Account	What the data tells us	What it does not	The question Meridian asks
Defence Construction Canada	Stantec is a top-three A and E firm here; a \$40B+ forward program is staged across the next several years.	Which design packages are funded first, and which regional source lists Stantec is missing from.	Which active and pre-procurement projects are nearest a funded design award, and what qualifies Stantec onto each regional vehicle now?
PSPC	The largest federal A and E buyer in scope; Stantec already holds named federal advisory and bridge work.	Where PSPC's real-property renewals sit, and which incumbents are vulnerable.	Which PSPC standing offers and supply arrangements are up for renewal, and how does Stantec get onto the next refresh?
The North	A multi-billion northern basing pipeline against almost no current incumbency.	Which Indigenous and northern partners are still uncommitted, and the community-benefit terms.	Who is the right northern or Indigenous partner to secure first, before competitors lock them up?
Provincial water programs	Recurring demand in Alberta, BC, and Ontario; Stantec holds large water and wastewater wins (Peel, Barrie).	Which municipal renewals are approaching and where competitors are entrenched.	Which water and wastewater master plans and capital programs renew next, and where can Stantec displace an incumbent?

This is the deliverable. Meridian turns the data above into a standing map of conversations, updated as the pipeline moves, so Stantec's pursuit leads always know who to call, what to ask, and when.

FROM INTELLIGENCE TO OPPORTUNITIES

How Meridian Strategies converts this into wins

Meridian pairs trusted relationships across the federal government, National Defence, and the provinces with a procurement intelligence engine built for exactly this market. Meridian will:

1. **Build relationships with priority buyers.** Engage decision-makers across the defence estate (DCC, PSPC, DND and the federal departments) and the provincial governments of Ontario, Alberta, and British Columbia, including the high-frequency buyers named in this report.
2. **Identify and influence opportunities early.** Monitor renewals, incumbent contracts, source lists, and the DCC forward program to flag opportunities before tenders are released, with three ongoing services:
DAILY OPPORTUNITY MATCHES **WEEKLY ANALYTICS** **CUSTOM AWARDS REPORTS** .
3. **Win the vehicles.** Map the standing offers, supply arrangements, vendor-of-record lists, and DCC and PSPC prequalification vehicles that govern how this work is bought, and the concrete steps to keep Stantec qualified on each, region by region.
4. **Navigate government and defence stakeholders.** Leverage Meridian's relationships and understanding of federal, parliamentary, and provincial processes to build awareness of Stantec's capabilities with the people who shape scopes and budgets.
5. **Protect and expand existing wins.** Use Stantec's national track record as reference accounts to defend incumbent positions at renewal and expand across jurisdictions, and broker the regional partnerships (Atlantic, Quebec, and northern) that a national prime needs to win at the base level.

The objective: position Stantec as the expected, well-connected bidder across Canada's defence and public infrastructure markets, improving win rates and capturing a larger share of the recapitalization ahead.

Methodology and sources

Award data

Market and award figures are aggregated from published Canadian public-sector award records covering 2015 to 2025, across federal, provincial, and municipal sources. Amendment rows are removed (record type, amendment titles, and amendment source identifiers), so values are not inflated by restatements. Scope is architecture, engineering, environmental, and infrastructure advisory work across the federal and defence estate plus Ontario, Alberta, and British Columbia. Disclosed value is a floor: only 4,529 of 8,313 captured awards publish a dollar amount. Vendor names are consolidated across spelling and entity variants; Stantec win counts attribute awards naming Stantec, with multi-firm roster and prequalification lists removed.

DCC forward program

The DCC capital program, three-year forecast, base-by-base pipeline, capital clusters, and project counts are drawn from Defence Construction Canada's published forward program and Industry Day briefing material. These are forward-looking planning figures, not awarded contracts, and are presented separately from the award data throughout. The NATO two-percent reference is Canada's stated commitment and is qualitative.

Live tenders

Live opportunities are a point-in-time snapshot as of 17 June 2026, drawn from federal, provincial, and municipal tender sources and filtered to Stantec's categories. Closing dates and availability change daily.

DCC three-year forecast, leading installations

Installation	Province	3-year forecast (\$M)
5 CDSB Gagetown	NB	557
CFB Esquimalt	BC	496
NCR / Ottawa	ON	487
Garrison Valcartier	QC	342
CFB Petawawa	ON	338
CFB Kingston	ON	290
CFB Halifax	NS	286
North Warning System	North	232
19 Wing Comox	BC	204
CFS Yellowknife	NT	196
4 Wing Cold Lake	AB	160
14 Wing Greenwood	NS	151
Plus 20 further installations (Borden, Trenton, Wainwright, Shilo, Suffield, Moose Jaw, Winnipeg, Bagotville, Goose Bay, Saint-Jean, and others)		balance to \$6,387M

Prepared by Meridian Strategies. Figures reflect what is visible in public records: a floor, not the ceiling. Forward-program figures are DCC planning estimates.