



NORTH OF THE BORDER: How U.S. Policy is Impacting Canada's Regenerative Medicine Sector

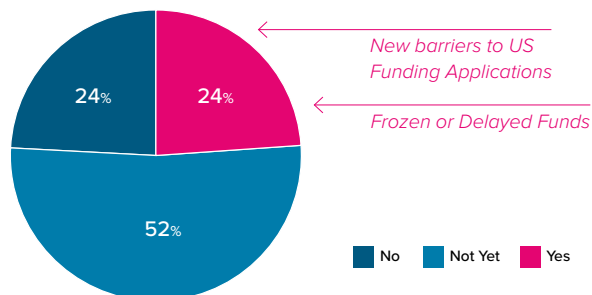
In April 2025, SCN invited its national research community to provide feedback on how current policy and research funding shifts in the United States are affecting the Canadian research system. Researchers from across Canada responded, sharing perspectives on uncertainty, the impact of tariffs, and concerns about Canada's direction in a changing global landscape. Key findings from are summarized below.

CROSS-BORDER COLLABORATIONS

Respondents to SCN's survey indicated heightened uncertainty about the funding landscape in the US. Among those with ongoing US collaborations or funding, more than 20% reported already being affected, while over 50% stated they had not yet been impacted but expressed concern about the future. This climate of uncertainty has begun to influence decision-making, with some respondents indicating they are cautious about initiating new US collaborations until funding stability is clarified. Additional concerns were raised regarding potential travel restrictions, equity for Canadian researchers, and the preservation of academic freedom, and the impact of reduced collaborations on Canadian and US researchers.

In response to increased uncertainty, most respondents indicated they are considering new collaborative opportunities outside the US, particularly in Europe and Canada. Despite this shift, US collaborators remain highly valued for their specialized expertise and access to unique resources.

Has the US government's policy changes, cuts/freezes on research had any direct or indirect impact on any of your cross-border collaborations or projects?

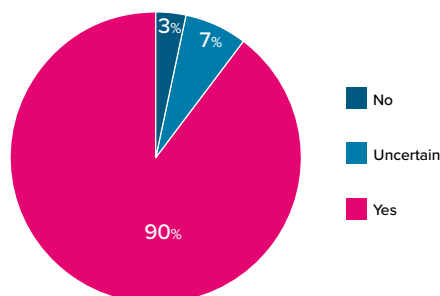


Canadian researchers value their collaborations with US researchers and are keen to find solutions to ensure global regenerative medicine research does not falter in the years to come.

TARIFFS AND ECONOMIC UNCERTAINTY

The impact of tariffs and rising costs is being felt across the research community, with 90% of respondents indicating they are already feeling the impacts of tariffs. Many researchers have begun adjusting their research programs to adapt to these changes. Efforts include seeking additional funding, reallocating and reprioritizing spending, and actively exploring the sourcing of research equipment and reagents from non-US vendors.

Are you concerned that incoming Tariffs will increase the costs of performing research at a level that will impact the conduct of experiments, projects, or longer-term programs?

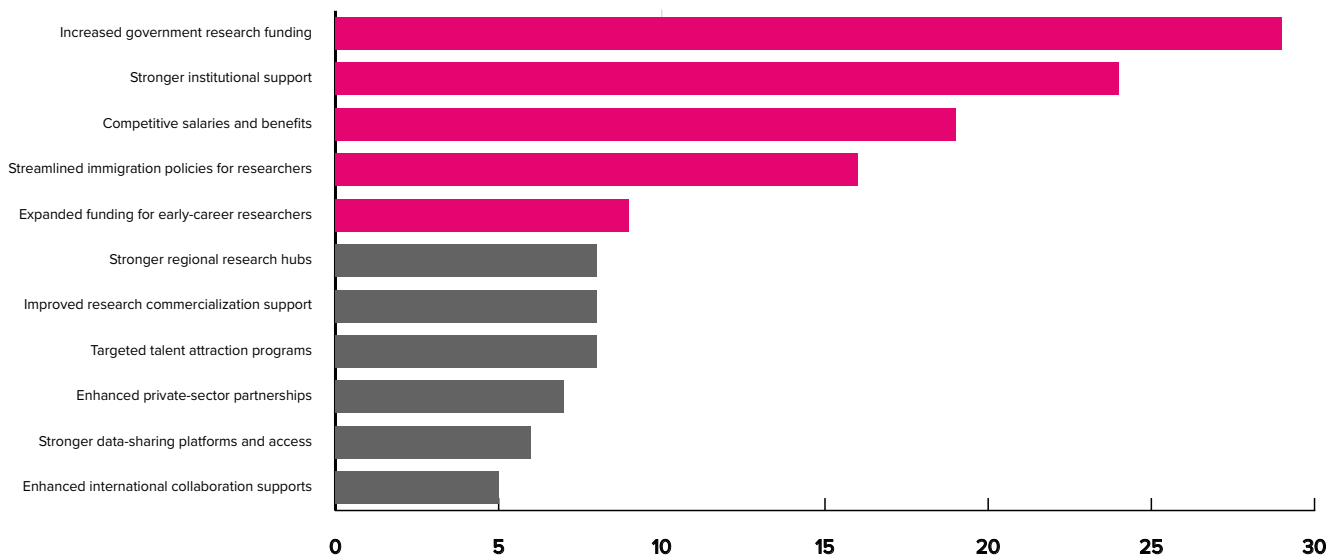


CAN THE US LOSS BECOME CANADA'S GAIN?

Respondents indicated moderate optimism that Canada may be in a position to attract US research talent and strengthen its research sector in response to new US policies, but only if proactive measures are taken to bolster the existing research system. Respondents emphasized the need for financial and practical research supports at both the governmental and institutional levels, including increased funding and research infrastructure. Streamlined immigration policies were also highlighted as a potential mechanism to attract and retain research talent from the US.

Respondents indicated concerns that increased talent recruitment from the US could place unsustainable pressure on Canada's existing funding programs and infrastructure if adequate and sustained resources are not available. There is also concern about an overreliance on short-term measures that lack long-term sustainability. The potential disruption to the established research ecosystem underscores the importance of strategic planning and the need for stable and predictable investments in research.

In your opinion, what are the top five conditions that must be in place for Canada to successfully realize the opportunities presented by US policy and funding shifts (including attracting new talent and strengthening the research sector)?



CONCLUSION:

Canada is home to world class health research, researchers, institutions and research hospitals. To fully addresses the challenges and opportunities associated with the policy and funding shifts in the United States, Canada

must stabilize and bolster the current research enterprise. By doing so both US and Canadian talent can collaborate and work at the cutting-edge of science in an effort to deliver the health innovations of tomorrow.

**IF YOU ARE A
REGENERATIVE MEDICINE
RESEARCHER IN CANADA
AND WISH TO ADD
YOUR VOICE TO THIS
SURVEY, PLEASE FOLLOW
THIS LINK.**

