GZERONORTH
the politics of canada-us relations

Dear <<First Name>>,

Happy "More Threats" Thursday. Here is the rundown for you today to help you make sense of things:

- Liberals can thank Donald Trump for their rise in the polls
- Tariff flip-flops: the latest
- Does Quebec still want sovereignty?
- Canadian nationalism — and history of US trade spats
- Ottawa's critical mineral worries
- **Plus:** Could Elon Musk's Canadian citizenship be revoked?

But first: Is the free world lost without America, or is America lost without the free world? We are looking for your answers today.

It's a question no one thought about when **Donald Trump** assumed office just 38 days ago.

Though he promised to be a transformative, "drain the swamp," America First leader, Trump 2.0 is exponentially more radical and less restrained than his first term as the 45th president.

In less than five weeks, Trump has upended the postwar world order, forcing America's longtime allies to redraw their maps, literally in the case of the Gulf of Mexico/America and strategically in every other way. It is a new world.

To Trump supporters, he is simply fulfilling his campaign promise of delivering deep change to the "deep state." After all, with a clean sweep of the presidency, Congress, and the popular vote, he has a genuine mandate — one that is strengthened by a right-leaning majority on the Supreme Court. Cue **Elon Musk**'s DOGE chain saw.

But let's pause for a moment and ask what exactly was included in the promise to make America great again:

Representatives on that.

- **Cutting the size of government?** Sure. Finding inefficiencies matters.
- **Border security and cutting down on illegal immigration?** That has already started, and he has support on that too from a wide array of voters.
- **Ending the war in Ukraine?** Yes. Who would be against that in principle?

But the details of these things matter. You can treat a broken foot by amputating the whole leg with a chain saw, but then you can't walk. In less than 40 days of mass policy amputations, you might start getting the sense that the treatment is already worse than the disease.

For example, do Republican voters, who wanted a more isolationist foreign policy, really want the US to take over the Gaza Strip? What part of the MAGA agenda saw that one coming?

Do they want to take over Canada, Greenland, and the Panama Canal too? Imperial land grabs were never part of Trump's campaign promises.

What about threatening to destroy Canada's economy in a trade war? Was that part of the promise? Because that's a lot different from negotiating better trade deals with friends.

To read the rest of my article on America Alone, click here. Otherwise, here is what else we have for you.

— Evan Solomon, Publisher

What We're Watching



The Liberals may have a chance after all

Over the past year, everyone had counted the Liberals down and out — with their chances of holding on to power after the next federal election in Canada hovering somewhere south of slim. But now the party is enjoying a twin boost from two recent shifts in the political terrain and has closed the polling gap between itself and the Conservative Party.

In January, **Justin Trudeau** announced his intention to resign as party leader and prime minister. Then **Donald Trump** was inaugurated as US president for the second time and immediately started coming after Canada hard, threatening economy-destroying tariffs, calling Trudeau "governor," and boasting about annexing the country and making it a "cherished" 51st state.

With Trudeau (and his baggage) on the way out and Trump stirring up nationalist fervor, the Liberals have, according to a recent poll by Ipsos, *surpassed* the Conservatives, bouncing back from 26 points behind in just six weeks to lead 38% to 36%. Another poll, by Léger, finds that with **Mark Carney** as Liberal leader, the party's support would hit 40% compared to 38% for **Pierre Poilievre** and his Conservatives.

One or two polls will never tell the whole story, but over at 338 Canada, which aggregates federal polls, the Liberals are showing a sharp uptick and, on average, find themselves within 10 points of their Conservative competitors — and climbing day by day.

Eurasia Group, but no one other than GZERO's editorial team — and excluding publisher Evan Solomon, a family friend of the Carneys — is involved in the selection and editing of our coverage.

Tariffs were postponed. For a day. They're back. For now.

After a short break, President **Donald Trump** announced Thursday that tariffs for Canada and Mexico are back on for March 4, with an additional 10% tariff for China. That's the plan as of right now, but things could change, as we've seen in recent days. One day earlier, **Donald Trump** *postponed* across-the-board 25% tariffs on Canada and Mexico until April 2. That pause came shortly after he said the tariffs were, in fact, going ahead on March 4 — and after he had paused them for 30 days last month. The White House also said steel and aluminum tariffs are still planned for March 12, as well as retaliatory tariffs in early April. Is that clear ... as mud?

The on-again-off-again tariffs are driving politicians in Canada and industry on both sides of the US-Canada border mad. The market hates uncertainty, and Trump's tariff plans and contradictory statements are leaving policymakers and the business community wondering what exactly he has planned for the long term.

Commerce Secretary **Howard Lutnick** did offer *some* clarity on Trump's tariff goals, saying that Canada and Mexico might be able to avoid duties if they can convince the administration they've done "an excellent job" on border security, but it's anyone's guess whether a) that's true and b) what qualifies as an "excellent job." Besides, any clarity ought to be taken with a grain of salt, given that Trump has also suggested tariffs are a means to balance US trade deficits, to force Canada to spend more on defense, to crush the country economically — and to bring it further under US control as the 51st state.

Will the Five Eyes become Four Eyes?

This week, Canada and the global intelligence community were shocked and concerned at the suggestion that the White House was considering removing Canada from the Five Eyes intelligence alliance. On Tuesday, the Financial Times reported that **Donald Trump**'s trade and manufacturing adviser, **Peter Navarro**, a trusted consigliere to the president, was lobbying the administration to kick Canada out of the intelligence-sharing group, which also includes the United Kingdom, Australia, and New Zealand. Navarro was quick to deny the reports, calling it "crazy stuff," and adding, "We would never, ever jeopardize our national security ever with

the administration who say Navarro's threats to cut Canada out of the Five Eyes alliance is a tactic for pushing the country to fall in line with Trump's demands on trade, border security, and defense spending.

CTV News reporter **Stefanie Ha** spoke with former **Justin Trudeau** national security and intelligence adviser **Vincent Rigby**, who said the Five Eyes threat could indeed be a "pressure point" the Trump administration is exploiting, similar to a tactic the president used during his first term by threatening to withhold intelligence from Canada.

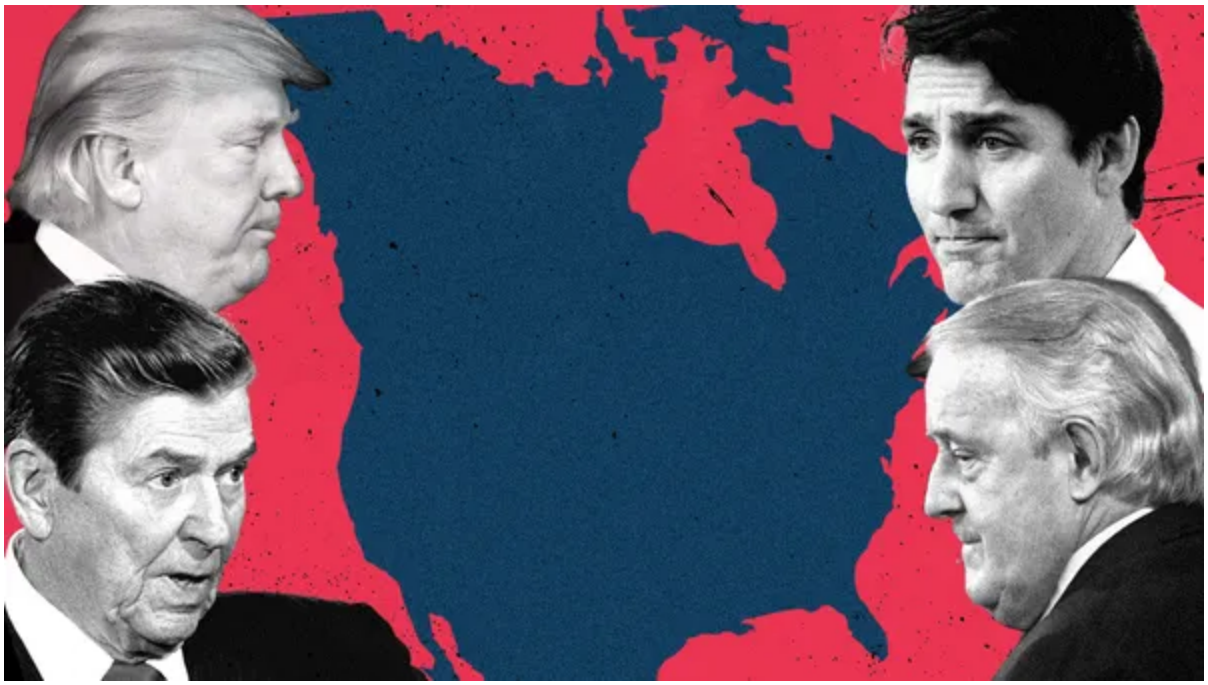
What does Trump's critical minerals play in Ukraine have to do with Canada?

After softening its demands, the US has secured a critical minerals development deal with Ukraine, whose president, **Volodymyr Zelensky**, is planning to visit Washington on Friday. The US had initially demanded $500 billion in critical minerals for jointly developing these resources and, ostensibly, repaying the country for money sent to Ukraine to aid it in its defense against Russia. Ukraine hopes the deal will ensure future US military funding assistance, which has been thrown into doubt since **Donald Trump** came into office. (Read our explainer on rare earths here.)

Closer to home, as Trump threatens Canada with tariffs, there's growing concern that the president's ultimate aim — aside from possibly annexing the country — is gaining control of Canadian critical minerals and rare earths. These resources, which include lithium, cobalt, copper, graphite, and more, are essential to several industries and products, including electric vehicles, cellphones, computers, and military hardware, making them not just essential to the economy but to national defense too.

In Canada, concern over critical minerals played a notable part in the Liberal Party's English-language leadership debate on Tuesday night, as candidates to replace outgoing Prime Minister **Justin Trudeau** spent much of the evening talking about threats from the US. Presumptive front-runner **Mark Carney** said Canada ought to leverage its critical minerals to deal with Trump and to strengthen the Canadian economy, while Parliament member and Cabinet minister **Karina Gould** warned that Trump's focus on Canada was expressly tied to a play for those resources. The growing focus on economic and domestic security in the US means we could be hearing a lot more about critical minerals and rare earths in the weeks and months to come as the president refines his demands on Canada.

Donald Trump is making Canadian nationalism great again



Canadian nationalism is surging as **Donald Trump** threatens the country with tariffs and annexation through "economic force." Struggles over free trade and talk about Canada becoming the 51st state aren't new; in fact, the history of US-Canada trade conflicts and worries about Canadian sovereignty go back more than a century. But this time, things may be different.

To understand the roots of Canadian nationalism and both the parallels and differences between past and present US-Canada battles, GZERO's **David Moscrop** spoke with historian **Asa McKercher**, Steven K. Hudson Chair in Canada-US relations at St. Francis Xavier University in Nova Scotia.

David Moscrop: Since Donald Trump started talking about making Canada the 51st state and threatening tariffs, there's been a surge in Canadian nationalism — as if the country became a nation of flag-wavers overnight. Are there other times in Canadian history when an external force or event has produced a nationalist wave?

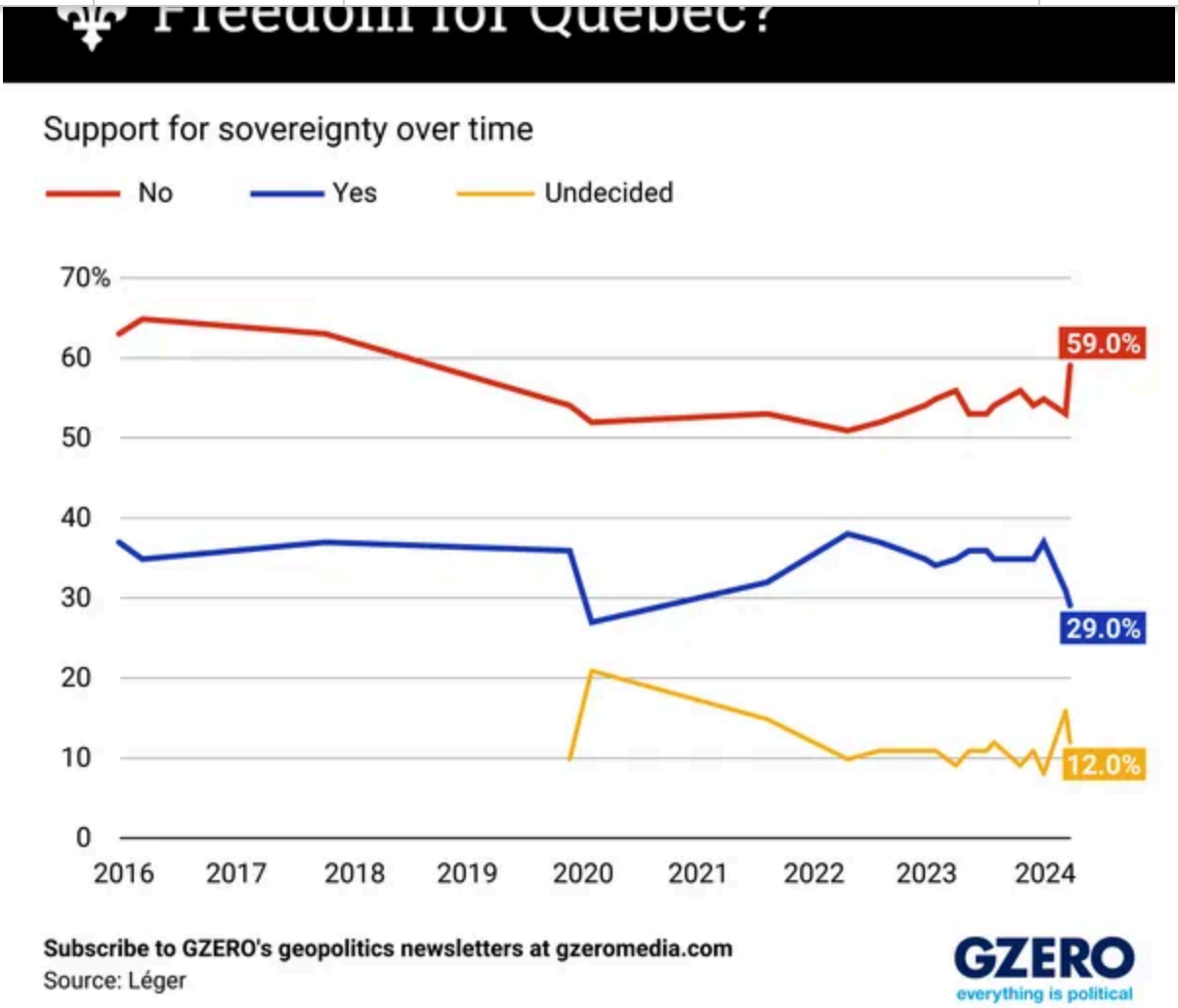
sparked a lot of this kind of nationalism. The 1911 election, very famously, was about free trade. The **Wilfrid Laurier** government had signed a free trade agreement with President **William Howard Taft**, and this led to a huge nationalist panic among Canadians — an anti-American nationalist panic driven by worry that the Laurier government was going to sell us out, that they were annexationists. That wasn't helped by the fact that the incoming speaker of the House of Representatives, a guy named **Champ Clark**, made a statement after the treaty passed through Congress but got held up in the Canadian Parliament. He basically said he couldn't wait for the stars and stripes to fly over British North America. That stirred a lot of nationalist, anti-American sentiment. The Laurier liberals were portrayed as sellouts.

Also, the free trade election of 1988 stirred up a lot of passions. **Brian Mulroney** and the Conservatives were portrayed as American sellouts. There's a Liberal attack ad that you've probably seen of a Canadian and an American diplomat meeting in a shadowy area, and the American diplomat is scratching out the border between Canada and the United States. Prime Minister **John Turner** talked about Mulroney becoming governor of the 51st state.

So we've seen that kind of nationalism during elections before. What's interesting about this moment is it's the pro-free-trade side that is full of nationalism in its wings as opposed to the anti-free-trade side of those other two elections.

For the full Q&A, click here.

Graphic Truth



According to a recent Leger poll, 27% of Canadians see the US as an "enemy," and there is nothing like a common enemy to spread unity. As **Donald Trump**'s threats against America's northern neighbor ignite Canadian patriotism, the number of French-speaking Quebecois wanting sovereignty has declined. In fact, it fell six points during Trump's first two weeks in office.

French-speaking Quebecois have always seen themselves as a distinct nation within Canada. Back in 1995, when Quebec held its last referendum on sovereignty, the vote was razor thin: 50.6% voted to stay in Canada, and 49.4% wanted out.

Fast-forward to today, and the independence movement is weaker than it was in the 1990s. Globalization, generational shifts, and an increasingly multicultural Quebec have changed the game. Younger Quebecois, even if they support more autonomy, aren't as invested in full separation. Plus, economic fears about losing access to Canada's federal transfers, an uncertain currency future, and the risk of companies

most voters.

This has only been compounded under the new US administration, as Trump's tariff threats and hints of absorbing Canada into the US have jeopardized Canada's economy and security, resurging Canadian pride and unity.

HARD NUMBERS: Anti-Musk petition grows, Measles on the move, Trump hawks gold cards, Polls gauge president's approval



325,000: More than 325,000 people have so far signed an online petition demanding that DOGE czar **Elon Musk** be stripped of his Canadian citizenship on the grounds that he is "a member of a foreign government that is attempting to erase Canadian sovereignty." Musk's boss, **Donald Trump**, has repeatedly threatened to make Canada "the 51st state." Unfortunately for the petitioners, Musk has Canadian citizenship legally — through his mother, who was born in Saskatchewan — making it virtually impossible to revoke.

Canada, there have been 98 cases of the disease, which is particularly dangerous for young children, compared to 147 cases in 2024. The latest outbreak has been traced to cases in New Brunswick last fall. Meanwhile, in west Texas, a measles outbreak has sickened at least 124 people and killed a child. California, Georgia, New Jersey, New York City, Rhode Island, and New Mexico have also seen measles cases in recent weeks. Experts say that slower uptake of measles vaccines may be contributing to the outbreaks.

5 million: Want to be a US citizen? Well, if you've got $5 million burning a hole in your pocket, you're in luck! **Donald Trump** is now planning to sell "gold cards" for that amount, granting foreigners the right to live and work in the US and offering them a swift path to citizenship.

44: After about a month in office, **Donald Trump**'s approval rating is 44%, according to a new Reuters/Ipsos poll. His disapproval rating is at 50%. For comparison, Trump's approval rating is about the same as it was at this point in Trump's first term, but about 10 points lower than the analogous rating for **Joe Biden**.

This edition of GZERO North was produced by Writers Riley Callanan, Alex Kliment, and David Moscrop; Graphic Artists Jess Frampton and Luisa Vieira; Managing Editor Tracy Moran; and Publisher Evan Solomon.

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