Exploring Pathways for Indo–Canada Critical Mineral Diplomacy

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1. Introduction

As India and Canada seek to diversify their trade dependencies, strengthening bilateral relationships has been a priority. Critical minerals and the clean energy transition have emerged as shared strategic issues between the two partners. This emphasis reflects both countries' commitments under the G7 Critical Minerals Action Plan (June 2025)[1]. The October 2025 Joint Statement[2] during Canadian Foreign Minister Anita Anada's visit to New Delhi underscored collaboration on green supply chains, clean technologies, and responsible mineral development. Further, the recent India-Canada Ministerial Dialogue on Trade and Investment (MDTI) held in November 2025, signalled growing policy alignment and aims to further sustainable economic co-operation.

India and Canada have 23 common critical minerals – including lithium, graphite, copper and Rare Earth Elements (REEs) – on their official lists as highlighted in Table 1. These official lists reflect minerals that both countries consider essential for economic growth and energy transitions, often due to heightened risks of supply disruptions. Canada has vast mineral reserves, advanced mining technologies, established regulatory processes, and processing expertise, which, combined with India's growing market, manufacturing capabilities, and clean energy ambitions, are an organic synergy for a meaningful economic partnership. Yet, despite this complementarity, Canada's current contribution to India is minimal, making up only 2% of Canada's total critical mineral export share[3].

This is a pivotal moment to deepen co-operation on critical minerals, as a closer partnership with Canada offers a concrete pathway to rebuild trust, strengthen engagement, and advance mutual prosperity. To this end, both countries committed to re-establishing the Canada-India Ministerial Energy Dialogue (CIMED) and holding the first Critical Minerals Annual Dialogue in Toronto in March 2026, marking a renewed phase of structural engagement.

This policy brief aims to understand the role that Canada can play in the context of India's broader energy security goals. It does so by examining existing domestic priorities of India's critical mineral strategy, particularly on the role of international co-operation.

Table 1: Common Priority Critical Minerals in India and Canada

Mineral	India			Canada
	Listed as a critical mineral	Domestic mineable deposits (Reserve)	Potentially mineable domestic deposits (Resource)	Listed as a critical mineral
High Economic Importance and High Supply Risk for India				
Antimony	✓	✓	✓	✓
Beryllium	✓	No data	No data	X
Cobalt*	✓	X	✓	✓
Gallium*	✓	X	✓	✓
Graphite	✓	✓	✓	✓
Hafnium*	✓	No data	No data	X
Lithium*	✓	No data	No data	✓
Nickel*	✓	No data	✓	✓
Niobium*	✓	No data	No data	✓
PGE	✓	X	✓	✓
Phosphorous	✓	✓	✓	✓
Strontium*	✓	No data	No data	X
Tin*	✓	✓	✓	✓
Tungsten*	✓	X	✓	✓
Deemed as High Economic Risk for India				
Copper*	✓	✓	✓	✓
Silicon*	✓	No data	No data	✓
Tellurium*	✓	No data	No data	✓
Titanium	✓	✓	✓	✓
Potash*	✓	X	✓	✓
Zirconium*	✓	✓	✓	X
Molybdenum*	✓	X	✓	✓
Selenium*	✓	No data	No data	X
Cadmium*	✓	No data	✓	X
Deemed as High Supply Risk for India				
REE*	✓	X	✓	✓
Bismuth	✓	No data	No data	✓

Germanium*	✓	No data	No data	✓
Indium*	✓	No data	No data	✓
Tantalum*	✓	No data	No data	✓
Vanadium*	✓	X	✓	✓
Rhenium*	✓	No data	No data	X
Not deemed a critical mineral by India				
Aluminium	X	No data	No data	✓
Caesium	X	No data	No data	✓
Chromium	X	✓	✓	✓
Fluorspar	X	No data	No data	✓
Helium	X	No data	No data	✓
High-purity iron ore	X	No data	No data	✓
Magnesium	X	✓	✓	✓
Manganese	X	✓	✓	✓
Scandium	X	No data	No data	✓
Uranium	X	No data	No data	✓
Zinc	X	✓	✓	✓

Source: Official critical mineral lists of India and Canada, along with corresponding reserve and resource data of India. * Import duties for these critical minerals have been removed under the 2024 and 2025 union financial budget. For silicon, import duties still apply to quartz and silicon dioxide imports[4].

2. India's critical mineral policy landscape

In India, the development of critical mineral resources is the responsibility of the Ministry of Mines, under the Mines and Minerals (Development and Regulation) Act 1957, and the Offshore Areas Mineral (Development and Regulation) Act 2002. These efforts are shaped by the National Critical Minerals Mission (NCMM), launched in 2025, supplemented and regulated by the recently launched National Policy on Geothermal Energy[5].

In 2023, based on economic importance and supply risk, the Ministry of Mines listed 30 minerals as critical[6]. They are considered essential for the country's economic growth, clean energy transition, and national security, but may be difficult to secure since India has limited domestic supply (mentioned in Table 1). Of these 30 critical minerals, India has no known deposits for 14 of them. Further, while India has discovered deposits for 9 of the critical minerals, these deposits have not been fully explored or developed in the country.

Today, India is 100% import dependent on many of these minerals, of which 5 have been identified by the Ministry of Mines to have both high economic importance as well as high supply risk, namely, lithium, nickel, cobalt, niobium, and strontium[7]. This reflects India's need for developing strong international partnerships to secure reliable and long-term supplies of these resources.

2.1 The National Critical Mineral Mission

In view of the lack of significant domestic resources and high import dependency, the government of India has allocated US$3.94 billion in support of the NCMM over a seven-year period between 2024 and 2031. The NCMM has two primary objectives – to secure India's critical mineral supplies and strengthen value chains[8]. International partnerships are one of the seven interventions under this mission. The rest are a 'whole-of-government' approach, policy change, financing, infrastructure development, human resource development, and technology.

Public Sector Undertakings (PSUs) are expected to play an important role under this mission, namely through Khanij Bidesh India Ltd. (KABIL), which is a joint venture of the National Aluminium Company Ltd., Hindustan Copper Ltd., and Mineral Exploration and Consultancy Ltd. The National Mineral Development Corporation, National Thermal Power Corporation Mining Ltd., and Indian Rare Earth Ltd. are also among other PSUs expected to invest in critical minerals.

To encourage these PSUs and private enterprises to acquire critical mineral assets overseas, the mission has a budget of US$2.07 billion. Through an 'Empowered Committee,' direction and inter-ministerial support will be provided to increase trade with resource-endowed countries across value chains with Critical Minerals Partnership Agreements (CMPAs). Financing is expected to come from international institutions such as multilateral development banks (MDBs), the Resilient and Inclusive Supply-Chain Enhancement (RISE) initiative, and the Confederation of Indian Industry's (CII) Activate Startups in Cleantech to Strategise, Execute, Navigate & Deploy (ASCEND) initiative.

RISE is an initiative of the World Bank, managed and implemented by the Energy Sector Management Assistance Program (ESMAP) and the Extractives Global Programmatic Support (EGPS) Multi-Donor Trust Fund. It provides knowledge, technical assistance, and finance facilitation to (i) create an enabling business climate generating new opportunities for developing inclusive supply chains of clean energy products in targeted low- and middle-income countries, bringing value addition and benefits of diversified economies; and, (ii) support global decarbonization efforts through more diversified and inclusive supply chains of clean energy products for the global economy.[9]

The ASCEND initiative seeks to serve as a platform for driving cleantech innovation through collaboration and bringing together all stakeholders – innovators, industry leaders, incubators and accelerators, investors, and ecosystem enablers to collectively accelerate the adoption of clean technologies in Indian industry.

Free trade agreements (FTAs) will play an important role. The 2022 India-Australia Economic Cooperation and Trade Agreement (ECTA) is a prominent example, as it removes tariffs on various Australian critical minerals, facilitating value chain integration[10]. Besides this, India is also in talks with Chile and Peru to finalize FTAs with critical minerals as

priority sectors [11]. The 10th negotiation for the India-Peru Trade Agreement and the 4th negotiation for the India-Chile Comprehensive Economic Partnership Agreement (CEPA) are planned to be held in January 2026.

India has removed import duties on a wide range of critical minerals under the 2024 and 2025 union financial budgets (see Table 1), reflecting its strategic focus on securing mineral supply chains. Additionally, exemptions have been extended to lead, zinc, graphite (with reduced duties), lithium-ion battery scrap, and various recycled forms of these minerals[12].

Table 2 provides a comprehensive description of the various international partnerships currently signed by the Indian government, with their focus areas. India engages across bilateral, minilateral, and multilateral frameworks to diversify supply chains, but most agreements have yet to translate into operational projects that strengthen domestic value chains. Advanced engagement is mainly with Australia and Japan, as well as developments in Argentina under KABIL.[13]

Table 2: India's existing international partnerships

Partner Country/Organisation	Type	Purpose/Focus
Zambia, Namibia, DRC, Ghana, and other AU	Bilateral	Access/collaborate on copper, cobalt, mining tech, supply chain diversification
Côte d'Ivoire	Bilateral	Knowledge/technology exchange, joint mining ventures, critical minerals development
Malawi, Mali, Morocco, Mozambique, Zimbabwe	Bilateral	Mining/critical minerals, diversify supply, tech & expertise sharing
Argentina (via KABIL)	Bilateral	Secure lithium, joint ventures, tech transfer, long-term supply for the EV sector
Australia	Bilateral+Minilateral	Lithium/cobalt/REE supply, tech/R&D, joint ventures, Quad/IPEF/MSP co-operation
Bolivia (via KABIL/CIL/Greenko)	Bilateral	Lithium: exploration, investment, joint ventures
Brazil	Bilateral	Access nickel, graphite, lithium, REE; knowledge sharing, joint research, and investment
Canada	Bilateral	Enhance minerals value chain, exploration, processing/refining collaboration
Chile (via KABIL, CIL)	Bilateral	Lithium exploration, due diligence, investment, supply agreements
European Union (EU)	Multilateral	Joint research, battery tech, recycling, supply chain resilience, TTC/MSP co-operation

Japan	Bilateral+Minilateral	REE refining, R&D, CEP, Quad/SCRI supply chain, rare earth trade/processing
Kazakhstan (IREUK JV, Rare Earth Forum)	Bilateral/Minilateral	Titanium, rare earth JV, tech exchange, training, regional forum
Mongolia	Bilateral	Copper, formal supply routes, private sector engagement, and reducing China's reliance
Russia	Bilateral	Geoscience MoU, REE extraction/processing, joint research, modernisation
Saudi Arabia	Bilateral	Investment, supply chain resilience, value-add processing, tech collaboration
United Arab Emirates (UAE/IRH)	Bilateral	Joint acquisition/development of global critical minerals assets
United Kingdom (UK)	Bilateral	Innovation/R&D, supply chain mapping, lifecycle management, India–UK TSI, observatory
United States	Bilateral+Minilateral	Critical minerals MoU, TRUST initiative, extraction/recycling, MSP, Quad
G20	Multilateral	Principles/frameworks, policy harmonization, resilient supply chains
International Energy Agency (IEA)	Multilateral	Data access, policy, capacity-building, research/training in mineral extraction
United Nations (UN)	Multilateral	Just transition, equitable access, sustainable mining, global voluntary principles
G7	Multilateral	Secure supply/diversification, ESG, large-scale investment, global co-ordination
Indo-Pacific Economic Framework (IPEF)	Minilateral	Regional supply chain, mapping, trade, downstream investment, India as vice-chair
Minerals Security Partnership (MSP)	Minilateral	Secure/diversify global supply, ESG, joint projects/financing, India as Global South representation
Quad (India, US, Japan, Australia)	Minilateral	Critical minerals supply, tech/investment/R&D, regional supply chain resilience

Source: Authors' compilation based on various sources.

3. Potential Models of Co-operation: Learning from the Australia Partnership

Signed in March 2022, the India-Australia Critical Minerals Investment Partnership (CMIP) represents one of India's most advanced critical minerals collaborations[14]. As India and

Canada develop their partnership, the CMIP offers a valuable blueprint of models that can be adapted.

First, it focuses on **structured investment mechanisms and offtake agreements**. Australia committed US$5.8 million over three years to encourage Indian investment in Australian projects, identifying five priority projects (two lithium and three cobalt) for detailed due diligence and potential joint investment[15]. By March 2025, KABIL and three other Indian firms were in talks for a 20% stake worth US$600 million in lithium projects in Western Australia[16].

Canadian uranium producer Cameco Inc. has already demonstrated the viability of supply agreements with India through uranium contracts. This model could be extended to other critical minerals where Canada has significant production capacity and reserves. Saskatchewan's potash reserves[17], Ontario's nickel deposits[18], Quebec's graphite resources[19], and rare earth projects across multiple provinces[20] position Canada as a reliable supplier for India's growing clean energy manufacturing sector.

Second, the Australia partnership supported by the FTA emphasizes **building resilient and sustainable supply chains** through the entire value chain. Rather than simply exporting raw ores, the partnership envisions Australian-processed critical minerals supporting India's manufacturing goals. India's 2024 budget announced zero customs duty on 25 critical minerals, including lithium, cobalt, and copper, with reduced duties on others, creating preferential market access for all suppliers[21]. This effectively places Canada on equal footing with other suppliers in accessing the Indian market.

Canada brings unique strengths in **processing and refining technology** that could significantly benefit India. While China dominates global critical mineral processing, controlling over 87% of rare earth processing and 58% of lithium refining[22], Canada has been investing heavily in developing midstream processing capabilities. The Canadian Critical Minerals Research, Development and Demonstration (CMRDD) Program has allocated US$192.1 million to support innovative processing technologies[23]. Some of the projects include rare earth oxide recycling facilities in Quebec, lithium processing technology development, and nickel-cobalt refining in Alberta. Canada's processing capacity for aluminium and uranium is well-established, and it is actively expanding capabilities for battery minerals[24].

A key lesson from the Australian partnership is the focus on creating value-added supply chains rather than raw material exports[25]. India-Canada co-operation could emulate Australia's approach by investing in joint processing and refining capacity, bolstering India's domestic manufacturing ambitions while enhancing supply chain security. This will help reduce dependence on third-country intermediaries that currently dominate critical mineral processing.

Third, Australia's targeted investment incentives for Indian firms to actively take **equity stakes in mining projects** have helped deepen long-term commitment and shared risks[26]. India-Canada dialogues could incorporate similar mechanisms, encouraging Indian public and private sector actors to co-invest alongside Canadian producers, thus facilitating technology transfer, capacity building, and trust.

Fourth, **research and development collaboration** has been recognized as an important pillar for India's partnerships with both Canada and Australia. The Australia partnership includes an Australia-India Critical Minerals Research Hub launched in 2023 between the Indian Institute of Technology (IIT)-Hyderabad and Monash University to foster collaborative research in mineral exploration, extraction, processing, and recycling[27]. A similar India-Canada research hub could focus on technology transfer in areas where Canada excels, including advanced mining technologies, sustainable extraction methods, mineral processing innovations, and recycling technologies.

Canada's initiatives, such as the MICA Network[28] , provide a platform for India-Canada collaboration. MICA's focus on advancing sustainable, efficient mining technologies aligns perfectly with India's objectives under the National Critical Mineral Mission to promote innovation, patent filing, and Research and Development (R&D)[29].

The October 2025 joint statement between India and Canada committed to relaunching the Joint Science and Technology Cooperation Committee (JSTCC)[30], which could serve as the institutional mechanism for critical minerals R&D collaboration. Areas of potential collaboration include processing technologies for complex deposits, recycling technologies for e-waste and battery scrap, artificial intelligence (AI) and machine learning applications for mineral exploration, and sustainable mining practices that minimize environmental impact.

The India-Australia partnership model of establishing dedicated bilateral research hubs for critical minerals exemplifies a strategic and institutionalised commitment to knowledge sharing. India-Canada could strengthen collaboration by establishing similar formalized centres to foster joint innovation, workforce skills development, and commercial-scale pilot projects – thus adapting the Australian partnerships template to Canada's unique technology strengths.

4. Future Pathways of Co-operation

The foundation for India-Canada resource and energy co-operation is already in place through decades of collaboration. Canada's nuclear energy sector played a formative role in India's atomic energy development, beginning with the Canada India Reactor Utility Service reactor in 1960 and continuing through the 2010 Nuclear Cooperation Agreement[31,32]. Beyond uranium, both countries have collaborated on renewable energy and clean technology. Building on these existing bilateral mechanisms, India and Canada can pursue the following strategic pathways to operationalize critical minerals co-operation:

1. Institutionalize Dialogue and Multilateral Engagement

Embedding the Critical Minerals Annual Dialogue as a permanent mechanism for policy oversight and implementation could help bring together government, industry, finance, and research stakeholders each year. Leveraging multilateral platforms, such as the Minerals Security Partnership (MSP) and the G7 Critical Minerals Production Alliance, to propose joint projects, secure funding, and enable triangular co-operation with developing nations could also be considered to help diversify the supply chain. This institutional approach could ensure comprehensive monitoring, strategic alignment, and flexible adaptation to evolving global supply chain dynamics.

2. *Forge Long-term Offtake and Joint Investment Agreements*

India and Canada can consider negotiating long-term offtake agreements for priority critical minerals, such as lithium, cobalt, nickel, graphite, and rare earths, involving Indian state-owned entities such as KABIL, Coal India, and NTPC. These deals can facilitate Indian equity participation in Canadian upstream mining projects, support financing for Canadian producers while delivering stable, diversified supplies for Indian manufacturing and energy needs.

3. *Build Resilient, Non-Competing Supply Chains*

Both countries can consider developing non-competing, mutually beneficial supply chains by leveraging the overlap of 23 critical minerals identified in their official critical minerals lists. This could enable co-operative stockpiling, joint exploration, and collaborative management of mineral resources to mitigate supply chain disruptions. The 18 critical minerals that do not overlap also present the opportunity for the creation of non-competing critical mineral supply chains. Policies can be considered to proactively cushion both sides against market shocks and force majeure events, while expanding the supply for green transition industries.

5. *Launch a Bilateral R&D and Technology Transfer Platform*

India and Canada could establish a cross-institutional platform linking research centres such as the Anusandhan National Research Foundation (ANRF), Natural Resources Canada (NRCan), and Indian Centres of Excellence (CoEs) for joint R&D, predictive geological mapping, and technology transfer, covering sustainable extraction, processing, and recycling technologies. NRCan is the Canadian government's research and policy-focused department responsible for sustainable development and management of the country's natural resources, including minerals. ANRF is India's apex statutory body providing strategic direction for research, innovation, and entrepreneurship across all fields of science and technology. CoEs are Indian government- and industry-led initiatives that focus on research, skills development, and innovation across specific fields such as skilling, petrochemicals, AI, and sustainable development.

The relaunched JSTCC could serve as this platform to include mutual learning of Indigenous Knowledge Policy, sharing data sets, and developing AI-driven exploration tools. Capacity-building initiatives, such as training exchanges and collaborative innovation projects, could be beneficial in supporting downstream value addition and developing future-ready supply chains.

6. *Set and Align Global ESG and Regulatory Standards*

Joint India-Canada committees can be established to harmonize environmental, social, and governance (ESG) standards, synchronise traceability, and update domestic policy based on shared best practices and global benchmarks. Such co-ordinated regulatory alignment has the potential to reduce investor uncertainty, enhance market access, and position India-Canada critical minerals as premium, responsibly sourced alternatives for global buyers.

In conclusion, India and Canada are both faced with the imperative to diversify supply chains, undertake climate action, and build economic resilience amid shifting global geopolitical headwinds. The foundation of decades-long collaboration and recent ministerial commitments lays a solid platform to institutionalize dialogue, forge long-term offtake and investment agreements, and jointly build resilient, non-competing supply chains. However, stakeholders must be mindful of geopolitical complexities, market volatilities, regulatory divergences, and dependencies on third-party suppliers that pose real risks to seamless co-operation. Proactive efforts to harmonize ESG standards, enhance exploration and processing technologies through joint R&D, and political will to overcome diplomatic and trade challenges will be vital for mutual success. By anticipating and addressing these, India and Canada can build upon a strong critical minerals partnership which has immense unrealized potential.

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