Episode 06

Gaël : We're in a canoe on the Kiamika Reservoir, in the Upper Laurentians. I'm with my girlfriend, Élise, who you heard in previous episodes and with whom I co-direct the podcast. (pause, thoughtful)

In just one year, so many things have happened… It feels like we're all a bit dazed, in a world changing quickly.

The irony is that even when we head out into nature to recharge, we find ourselves more and more in places compromised by mining activity. Like here, where an open-pit graphite mine could begin operations right inside the park's territory.

The kind of situation we're more used to in Abitibi-Témiscamingue, but that's starting to spread across the country, into regions that aren't traditionally mining regions.

We're making a new episode of the podcast precisely because these projects could accelerate and multiply, in a global context that's intensifying on every level.

The famous "dilemma" from the first episodes—multiplying open-pit mines in the name of the energy transition… sadly already feels far away.

One year later, conflicts, annexation threats, political tensions, recession fears, new diplomatic alliances, and tariff wars have upended our governments' priorities. And these events often have a link to critical and strategic minerals.

Closer to home, still within the same year, Quebec's battery supply-chain project is faltering. One of its biggest instigators, the Minister of Economy, Innovation and Energy, Pierre Fitzgibbon, resigned.

The much-touted Northvolt mega battery-factory project has been definitively abandoned by the Government of Quebec. Following the parent company's bankruptcy in Sweden and in the United States between November 2024 and March 2025, the CAQ government lost confidence in the project. At the time of recording this episode, Quebec had lost, at a minimum, nearly 300 million dollars in this affair.

And even if the government's objective remains to develop the battery supply chain, numerous mining or processing projects are struggling to get off the ground.

In the meantime, we still don't have a costed plan to reach our GHG reduction targets.

But that's not all. Over the past year, we stumbled upon surprising news. The U.S. Department of Defense—the Pentagon—invested in a developing graphite mine project. Not the one where we're canoeing, but another project, this time in Petite-Nation, in the Outaouais region.

That piece of information seems to have slipped under the radar… Then again, the news cycle wasn't exactly short on twists and turns. But… still, it doesn't seem trivial…

Why would a military organization like the Pentagon be interested in graphite from the Outaouais? What is it going to be used for?

And… if a military body subsidizes a critical and strategic minerals project, can we really still talk about a transition plan?

Sooo, uh, well… hello again. It's me, Gaël Poirier, the guy from Abitibi-Témiscamingue who's into critical and strategic minerals… and who's kicking things off a little strong, huh?

You're listening to the sixth episode of *Au pays des cratères*.

On May 16, 2024, in an official press release, the U.S. Department of Defense announced an investment of about 11 million dollars in research and development for a graphite mine in Petite-Nation, near five municipalities. The project, called "La Loutre," is led by Lomiko Metals, a Canadian mining exploration company specializing in graphite and lithium.

The potential mine isn't at the exploitation stage yet but rather in "pre-development." After purchasing claims on the territory, Lomiko undertook exploration work from 2018 to 2022 to find two promising deposits.

According to the company, the deposits contain ore of excellent quality and would be an opportunity to compete with graphite from China, which holds a near-monopoly on the resource worldwide.

But starting up a mine obviously involves significant costs, and companies need investors. That's the stage where the U.S. Department of Defense subsidy comes in: the pre-development stage. The federal government is also participating, for 4.9 million dollars.

Let me make a brief aside here, because it's important to know that the graphite that would be mined there is one of roughly thirty minerals identified as critical and strategic by our governments, at the same level as lithium, which we talked about a lot in the first five episodes.

It's an essential component used in lithium-ion batteries for electric cars, but also in solar panels and in micro-technology components.

That's why I don't understand why a military organization would financially support the project…

And it feels like this is all taking on… enormous proportions.

To better understand the situation, I started by contacting someone on the ground who knows the La Loutre project very well.

I spoke with Louis St-Hilaire, a local resident who opposes opening the mine. Among other things, he co-founded the QLAIM Coalition, which now brings together more than 150 lake-protection associations across Quebec and advocates for protecting the territory. He told us how it all began.

LOUIS : They did some small exploration work, but in 2022, they did a real exploration campaign that totaled 13,000 meters.

And so, if you do the math, that's actually 80 holes of about 160 meters each that were drilled. They started by insisting a lot, a lot on the fact that it was a green project. That resonated with some people who are concerned about the environment, who say we need to help depollute the planet. It lost a lot, a lot of its shine when we learned that the U.S. Department of Defense was now subsidizing that company. That happened in May 2024. We did our research on that, and found studies saying that the mineral in most short supply for the U.S. military is graphite. That set off a red light for many people.

Gaël : The project raised so many concerns that citizens, elected officials, and even businesspeople joined forces to publicly oppose the mine.

audio excerpt town-hall meeting

They organized gatherings, put signs in front of their homes, spoke up in the media and at municipal councils, and launched local and regional petitions.

The five municipalities affected by the project formed the Alliance of the Petite-Nation Nord Municipalities to pool their voices and financial resources to face the mining boom in the region.

It must be said that Lomiko Metals didn't hide the scale of the La Loutre project. In its own documents, it ranked itself 7th among the largest graphite deposits in the world.

Among the concerns frequently raised by citizens, water contamination often topped the list.

The targeted site would be just a few hundred meters from Lac Doré, and it sits on two watersheds, with lakes on each side that together have several hundred residences. The lakes eventually converge and flow into the Ottawa River, which empties into the St. Lawrence River…

LOUIS : But beyond that, I'd add there's a whole way of life that's completely disrupted. It's a sociological upheaval. We change the way of life; we become an industrial region even though we chose to live in a nature park.

Gaël : In response to this mobilization, the minister responsible for the region, Mathieu Lacombe, "announced (…) that the La Loutre project did not have the necessary social acceptability to receive government support." He therefore confirmed that the graphite mine project would not receive financial backing from the provincial government.

A public statement like that from a minister—well, for a guy from Abitibi, that's unheard of.

But that doesn't mean the mine won't happen. It's simply a refusal to fund the project, while the federal government and the U.S. Department of Defense still support it.

In the winter of 2025, the tariff war imposed by the United States and the numerous annexation threats against Canada, Greenland, and Panama destabilized global geopolitics. Trump also issued an ultimatum to withdraw diplomatic and military support for Ukraine unless it signed an agreement guaranteeing the U.S. a significant share of its natural resources, including critical and strategic minerals. And all of this unfolded at a breakneck pace.

It's hard to look at the situation without thinking of La Loutre. I wonder if it's a one-off in this country… If the Pentagon has invested in other mining projects.

The more we research, the more we start to grasp the scope of the situation. We discover, with astonishment, that the Pentagon ramped up its investments across Canada starting in 2019, 2020…

We dig a little deeper. We move from press releases to newspaper articles, all the way to stock fluctuations for metals like graphite, lithium, and nickel.

By the way, our whole thing may sound a bit "investigative journalist"… but in the end, it's all available online, on the DoD website. It's not hidden at all. The U.S. Department of Defense states pretty clearly its intentions to invest in our deposits.

Office recording, like for buying mining claims:

Gaël : Okay, I made the list of investments that the U.S. Department of Defense has announced since 2024…

Élise: Go ahead.

Gaël: They announced 22 million Canadian dollars for tungsten extraction in the Yukon, 27 million for cobalt in Ontario, 9 million for cobalt in the Northwest Territories, 20 million in tungsten-molybdenum in New Brunswick… On top of that, I found 18 million more in a company in Candiac, Nano One Materials, which produces military-grade lithium-iron-phosphate cathodes.

Élise: Okay, so it's not just La Loutre…

Gaël : All that money was invested at the same time we were pushing the energy transition narrative in Quebec and Canada…

Now, we should nuance that most of those mining projects aren't yet in operation, and at the industry scale, those subsidies aren't that huge. What's surprising, though, is the number of investments made and the variety of minerals targeted.

After realizing all this, I got back in touch with Rodrigue Turgeon, whom you heard in previous episodes. He's a lawyer practicing environmental law, co-lead of the national program at MiningWatch Canada, and also a co-spokesperson for Québec meilleure mine.

Rodrigue : What we know is that the U.S. reserve, during peacetime, had considerably reduced its stocks—its mineral reserves. Since there was no need to process those resources, they sold these commodities on the markets. But now, their reserves have dwindled. So in a context where war is more present, the military is looking to rebuild its mineral reserves and wants to source from its allies.

Ultimately, the notion of the energy transition, which was the justification, has blown up in recent months. It no longer holds. We're now talking about national security. We're in a war-economy mindset… and if, ultimately, what's more profitable to produce is military technology, then that's what Abitibi lithium will be used for, and the rare earths from the North Shore.

And militarization is something to worry about, but they're also open to the idea of selling to data centers for artificial intelligence. So, you know, is it more reassuring for it to go to AI data centers than to militarization? One might be tempted to say yes, but at the same time, that has nothing to do with reducing greenhouse-gas emissions.

Gaël : I also contacted Michel Jébrak, professor emeritus at UQAM and an internationally recognized economic geologist. He devoted his career to understanding the link between natural resources, large industrial projects, and geopolitics. I wanted to better understand why those investments have accelerated. Is the U.S. Department of Defense the only military that invests in mining projects? If these metals are suddenly in very high demand, is it because we're starting to rearm all over the planet?

Michel Jebrak : Today, military technologies and civilian technologies have merged. An F-35 is packed with the same materials you find in a Tesla. In other words, military technologies have become hungry for the same products as the civilian sector. It's almost indistinguishable.

There are a few military applications, like weapons—chrome, antimony—there are a few metals like that which are used more in the military realm than the civilian realm. But essentially, all the armed forces have gone electric. They've moved to drones. We're seeing the military revolution unfolding right now.

And so, obviously, they're going to… It's inseparable. A civilian drone and a military drone are the same. And the arms race has taken on considerable scope again, of course, because what the war in Ukraine shows today is that all militaries need to rebuild their armaments.

Thinking about it, it's true that extracting ore from the ground to make weapons isn't exactly new. Since antiquity, military equipment has always required metal. It's just that now, the global context is changing, upending, and accelerating the rush for our strategic minerals.

And Rodrigue and Michel aren't the only ones connecting this to the global context. Across the Atlantic, independent journalist Célia Izoard investigates the social and environmental stakes of new technologies—robotization or the energy transition. In 2024, she published *La ruée minière au XXIe siècle*, which deconstructs the myth of a green transition built on massive exploitation of natural resources.

I found really compelling passages in her book about political tensions and metal extraction culminating in a kind of… endless cycle. She writes, among other things:

Quotes : *"Since the beginning of the war in Ukraine, the world is in full rearmament. The irony is that this rearmament only intensifies the race for metals in which the great powers were already engaged, and which is itself partly the cause of the conflict in Ukraine." (p. 189)*

"The more the great powers seek to prepare for conflicts by accessing strategic deposits, the more they propel us into war."

Gaël : In the current context, calls to accelerate extraction from our subsoil are multiplying. They come from industry, from certain experts, and from government. In recent months, those calls have resulted in concrete actions.

In May 2025, the Government of Quebec adopted Bill 69 under closure. According to newspaper articles and expert analyses, the law aims to better plan energy in Quebec for the

next 25 years and would give the government more power to quickly approve major energy projects.

The federal government, for its part, adopted Bill C-5 last June, also under closure. Broadly speaking, this law will favor trade between provinces and accelerate the realization of economic projects deemed strategic for Canada.

A few days earlier, the Canadian Climate Institute published a report stating that to secure our place in the race for critical minerals, it will be necessary to open between 30 and 40 mines on our territory by 2040. That plan would require investments of more than 30 to 65 billion dollars.

Another sign that things are moving quickly: new agreements on rearmament targets are multiplying worldwide.

Among the most notable examples is NATO's new target: the 32 member countries voted to increase their military budgets.

The minimum percentage of their respective GDP devoted to defense must therefore rise from 2% to 5% within 10 years. Which means that in Canada, the military budget must go from 62 billion dollars per year… to 150 billion.

At the provincial level, Investissement Québec modified its policy to allow the financing of companies in the defense sector. Previously, the state corporation wasn't allowed to invest in that sector. The government also stated that "Defense is now one of (its) three priorities."

All that amounts to enormous changes that will directly impact us on the diplomatic, economic, and even democratic fronts…

And it all happened in just a few weeks…

We're told there's an urgent need to act. I share that feeling, but does that now mean the energy transition is suddenly being brushed aside? Because the climate crisis is also accelerating and intensifying…

And are we going to witness a multiplication of mining projects? What will that mean for our territories? For my region?

It feels like we don't know where we're headed any more than before, except we're getting there faster and faster.

As in the previous episodes, I tried to contact our governments to get answers to those questions.

I wasn't too hopeful about getting a reply, but this time, Quebec's Ministry of Natural Resources and Forests and Natural Resources Canada did get back to me…!

Well, I couldn't get a formal interview to ask my questions. Instead, I received long emails several dozen lines long. Obviously I can't read their entire messages to you, but I'll share a few excerpts that confirmed their intentions.

Quebec's answer : To maintain and improve its position on the world stage, Quebec will seek to accelerate the development of projects, notably by improving governmental authorization processes and with dedicated financial support, but always without compromising existing regulations, an element that is part of its brand image in terms of ESG (environmental, social, and governance) criteria.

Gaël : … and the response from Natural Resources Canada.

Canada's answer : We intend to accelerate progress in Canada's critical minerals sector, a responsible, sustainable, and innovative sector.

With a budget of 3.8 billion dollars, the strategy frames the entire value chain—from exploration to recycling, including processing—so that the development of critical minerals supports clean growth and the resilience of our economy.

As a sign that Canada's ambitions are translating into concrete actions, domestic production of key critical minerals has grown by 15% since this strategy was adopted.

Gaël : Ian London, executive director of the Canadian Critical Minerals and Materials Alliance, also shares the desire to accelerate the development of our metals industry. The Alliance advocates for a comprehensive industrial strategy around critical minerals in Canada. It doesn't stop at extraction: its objective is to develop the entire value chain.

Gaël: Sorry for our English, it's a bit rusty.

Ian London: Your English is much better than my française!

Gaël : Far from speaking in platitudes, he agreed without hesitation to talk to us on Zoom, noting in passing that this interview wouldn't be possible without transition minerals.

Ian London : The mine will happen, but we can't wait for the mine to happen. We do have to accelerate the approval process. Some of these things take 15 years for an environmental process. Too long, shorten it. We still need quality work, but we have to make that shorter. For the last 20 years, as Canada talks about it, as Ontario talks about it, Saskatchewan talks about it, Quebec talks about it… Our friends in China and Asia have implemented four five-year plans. So by the time we get going, they're going to be two generations ahead.

Gaël : To speed up processes, Ian London suggested something that really surprised me.

Ian London : There's about—there's lots of projects in Canada. Many of them will go nowhere, ever— they're promotions, these are sales pitches, they're not very good projects. But we have to make priorities. Some of these communities don't want the project, so don't proceed from a government perspective because we're against the timeline. Some of these discussions on some of the projects are going on for 20 years. I believe we do need environmental standards, but we can—we're never going to get it perfect. And if some communities say no, thank you very much, tomorrow.

Gaël : I couldn't believe it. Since we started working on the podcast and trying to get in touch with players in the mining industry, I never would've imagined hearing one of its members recommend that governments not move forward with a mining project. It's worth highlighting that

from someone actively advocating for the critical minerals industry, that kind of message is pretty rare.

And Ian London isn't necessarily wrong that mining projects can sometimes develop very slowly.

Élise and I reached back out to citizens we had interviewed on the ground. Just for the mining projects we covered in the first five episodes, for example, most are still at the same stage as when we recorded two years ago…

But then let's think about it… If the life and death of those mining projects are dictated by market fluctuations… Is it possible that the 30 to 40 mines expected to open in the country, according to the Canadian Climate Institute, will face the same challenges?

Normand Mousseau : Look at the projects, If after two years nothing has happened, why is it essential that we make a snap decision in three months, when nothing might happen for 15 years afterward?

Gaël : The person you're hearing is Normand Mousseau, physics professor at the Université de Montréal and scientific director of the Trottier Energy Institute, whom you heard in episode 4. He's a renowned expert on energy issues. I contacted him again to understand the risks associated with this acceleration. Because if everything is going faster and faster… I wonder whether we'll have enough time to reflect and make the right decisions about our energy future…

Normand Mousseau : I think it represents the risk of making decisions that are always based on short-sighted analyses, and therefore making mistakes that will be very costly to fix. Whether it's when we're told we have to accept a mine because if it's not now, it's never—okay, well, that's not how to proceed. We need to take the time to analyze. We need to do it properly and quickly, but we need to do it properly.

We sometimes tend to drag things out too long; that's not a solution either. But we need to be able to project ourselves forward and understand. I'm not convinced we have a plan, once again. We have sectors we're trying to deploy. For example, with lithium, we're trying to tie it to battery cell manufacturers. It's somewhat tied. In Bécancour, we do have one manufacturer really setting up, another delaying.

So, it's difficult, but it's developing slowly. And I'd say it fits into a supply chain more than into a plan.

Gaël : Okay, so this is a little update on that time in episode 4 when I kind of panicked upon realizing we didn't have a transition plan.

According to Mr. Mousseau, we still don't. Okay.

Normand Mousseau : But we have energy visions where no one believes what they're saying. The government—what interests it is thinking we'll attract investments to Quebec. Without understanding that the energy transition is also our job to do, to transform ourselves, and that we stand to gain by transforming.

At the federal level, they talk about things that don't hold water. We will not be a green energy superpower. Let's forget about that. And we have certain players, actors, who use international

conditions for their own benefit. There are winners in that. Players who benefit from always being in a state of urgency because it allows costly decisions to be made—decisions whose winners are not the ones who would be if we took the long view.

So obviously, that benefits certain players. But as a society, that's not in our interest; our interest is to project ourselves ahead and say, here is our objective, and then structure measures or approaches to take us somewhere.

Gaël : Rodrigue Turgeon is also concerned about the impact that accelerating mining development could have.

Rodrigue Turgeon : What's unfortunate is that right now we're going to see losses of what we considered social gains in terms of oversight and impact assessments. We're certainly going to lose a lot. But again, we need to put that in context because even the protections we have in Quebec were of little use.

Because beyond that, it's an industry that self-regulates. There are no inspections, there are no sanctions—or very few. And it's the market that dictates the life and death of projects.

The government is about to table an action plan for the next five years, but can it answer the question "why are we doing this?"

Investments—the money spent by the state—keeps shrinking in public services, in education, in health, but keeps increasing in sectors tied to the battery supply chain, to critical and strategic minerals, to the tune of hundreds of millions of dollars, without us having an answer about the ultimate goal of why we're doing this.

Is it just to buy ourselves time, or will it be because we will have truly integrated it into a plan to reduce pressure on the environment?

Gaël : Today, I feel far from Abitibi. Far from home.

I couldn't go back to make this episode, and I think I miss it.

I went for a walk by the river here in Montreal, near the Lachine Rapids. Just to try to breathe and slow time down.

It always gets to me to remember that this water, in part, comes from home.

I feel like we're pretty far from the first episodes, when we almost believed in a transition plan. We barely talk about it anymore today.

I would've liked to end this project on a more luminous note. And tell you that we're moving forward.

*** ambiance of referendum ambience

Volonteer : Hello, Mr. Brosseau. Yes, hello. My name is Diane, from Duhamel. I'm calling to remind you that today is referendum day…

Gaël : We went to Petite-Nation to attend Quebec's first municipal citizens' referendum on mining activity. The five municipalities invited citizens to vote for or against the establishment of an open-pit graphite mine on their territory.

It's a consultative referendum, overseen by Élections Québec, at the municipal level. Legally, there's no guarantee it will be recognized by the federal or provincial governments, but the five municipalities want to send a strong message with this democratic exercise.

*** Results + applause ***

Gaël : Since I'm from Abitibi, seeing people mobilize—and largely against a mine—for me it's like… surreal. I've never seen that.

****excerpt mayor David Pharand : The Alliance's mandate is to work very hard to ensure that funding and mining claims are withdrawn. That is our mission.*

Gaël : Because where I'm from, that would never happen like this.

Because Abitibi is still labeled a "resource region," we remain dependent on the mining industry. Back home, it's harder to oppose a mining project en masse—to bite the hand that feeds us.

So… I'm torn between my enthusiasm at seeing this democratic effort today and my fear that we'll be forgotten, farther north, if the south of Quebec started rejecting mining projects across the board.

I started reflecting on what it means to say no to a mine. On the fine line between the example it could set everywhere else in Quebec and Canada, without falling into "not in my backyard."

But today, I have to say, seeing these citizens mobilize, organize, weave bonds… I don't know, there's something about it that moves me.

****excerpt Louis St-Hilaire :"We built something with this. And we mustn't lose it."*

Gaël : Especially since, in a world changing so fast, with pressure to extract more, faster, with threats of tariff wars, annexation, technological upheavals, and a worsening climate crisis… Choosing to act is no small thing.

Because otherwise, what power do we citizens have left, when all these issues seem to overwhelm us, and we feel isolated and powerless?

Éloi Halloran, a local citizen, is looking precisely at these questions with the Comité autonome de lutte contre La Loutre, les Mines et l'Extractivisme—CALME. I'll let you hear his answer.

Eloi Halloran : Saying we're incompatible means yes, defending the territory, but also looking ourselves in the eye and deciding what we want to do with that territory. I think when we oppose a mine project, we have to be able to defend a societal project at the same time, because otherwise we end up refusing a project that will just be shoved down someone else's throat.

And unfortunately, it's a bit like the burden of proof—we end up having to oppose something to the mining company, so it's as if the weight is on our side to propose alternatives. Not just to

oppose projects, but to say in the name of what we're opposing. And to realize we're more than just settlers.

We can live on this territory; we can find something other than extracting resources to do with it. It's a broad program, agreed, but having those conversations, daring to assert dissenting lines, and talking with people—because people aren't stupid. As soon as you speak to them with respect, things can be set in motion; other collective narratives can emerge. And that's perhaps our only hope.

Rodrigue Turgeon : It's not just about saying "we have 40 mines to build—too bad for you, Abitibi; too bad for you, North Shore; too bad for you, Petite-Nation." It's more like "can we bring together minds, politicians, and Indigenous nations to ask how we can reduce our pressure on the environment, on the climate?"

We can't keep consuming so many mineral substances. We need to reduce our pressure because the rest of the world can no longer keep supplying us with these mineral resources. We have to operate them within our borders, and we might not be socially ready to sacrifice 40 communities.

But if we're not ready to sacrifice them here, we shouldn't be ready to sacrifice them elsewhere either. If the mineral pathway that demands more minerals doesn't seem viable to us, can we move toward a pathway that seems more humane?

Gaël : Beyond the numbers, this result is also a fairly unprecedented moment that could become a historical precedent.

The ball is now in our governments' court, to decide whether the result will be recognized and respected.

If mining issues are starting to affect regions that, until now, weren't touched by the mining industry… I hope this is a starting point to talk from one region to another. That it will force a collective reflection, a broader stance.

To decide together what model we want to follow. What kind of world we want to leave future generations.

You've just heard the final episode of *Au pays des cratères*.