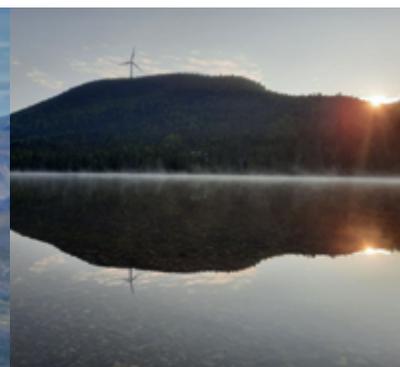


PROPELLING QUÉBEC'S MINING SECTOR

Québec Strategy for the Development of Critical and Strategic Minerals



2025
2031



Ministère des Ressources naturelles et des Forêts (MRNF)
in collaboration with the Direction des communications.

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PREMIER'S MESSAGE

Dear Quebecers,

The world is changing radically, and Québec must adjust if it wants to move forward on the road to prosperity. In a context of energy transition, technological transformations and realignment of security challenges around the world, critical and strategic minerals have become essential. For Québec, they represent a concrete opportunity to strengthen the expertise available to us here, and to create more wealth, especially in our regions.

With the Québec Strategy for the Development of Critical and Strategic Minerals 2025-2031, our government is setting a clear direction, as we committed ourselves to do in our new economic vision, [Le pouvoir québécois](#).

Québec can rely on important assets: a rich territory, recognized expertise, a skilled workforce and a capacity for innovation. By working with industry, the research community and Indigenous and local communities, we can meet the needs of markets here and abroad, especially since Québec is a reliable partner and ally for democratic countries.

By focusing on our critical and strategic minerals, we are making a clear choice: to support the development of the regions, create quality jobs and ensure Québec's long-term economic growth.

François Legault

Premier



MESSAGE FROM THE MINISTER OF NATURAL RESOURCES AND FORESTS

The Québec Strategy for the Development of Critical and Strategic Minerals 2025-2031 is based on a simple conviction: by leveraging our resources and ingenuity, we are propelling Québec's mining sector and building together a more prosperous Québec, with more industries, more green technologies and more quality jobs in our regions.

We want to see the emergence of new responsible mining projects, which build on best practices in terms of the environment, social acceptability and collaboration with Indigenous and local communities. We also want to increase the processing of our resources in the territory.

Through this ambitious strategy, we aim to strengthen our economy by reducing our reliance on foreign supply chains for products critical to electric mobility, industrial electrification, clean energy generation, and high technology. Through investments in research, innovation and training, we will become a hub of knowledge and expertise in the field of critical and strategic minerals.

Quebecers will be able to appreciate the results of this mobilization: first-class jobs, growing local businesses, strong partnerships with Indigenous and local communities, mining projects integrated into their communities and the collective pride of being at the forefront of harmonious and responsible mineral development.

Jean-François Simard

Minister of Natural Resources and Forests

GLOSSARY

Value chain: All of the steps generating added value and determining the capacity of a field of strategic activity, a company or an organization to obtain a competitive advantage.

Local community: All non-Indigenous people who live in a given territory, such as a local municipality or a regional county municipality.

Host community: Local or Indigenous population and actors of the territory in which the project takes place or where its repercussions are most directly felt. Includes the Indigenous and local communities that host, live with, and adapt to the project, both in terms of positive outcomes and associated constraints.

Ecodesign: Product or process design approach by integration of environmental considerations in order to reduce environmental damages throughout the lifecycle of these products or processes.

Circular economy: Production, exchange and consumption system intended to optimize the utilization of resources at every stage of the lifecycle of goods or services, in a circular logic, while reducing the environmental footprint and contributing to the welfare of individuals and communities.

Sector: All of the actors engaged in the value-creating activities of a given sector of economic activity, including, but not limited to, research and development, exploration, production, processing, recycling and marketing activities.

Ore deposit: Mineral deposit that has been proved to be profitably exploitable.

Mineral deposit: Concentration at the same location of a mineral containing one or more possibly exploitable metals or mineral substances. It is described in the following technical reports: calculation of resources, preliminary economic assessment and pre-feasibility study.

Maximizing of economic benefits: Approach to linking prime contractors and suppliers which aims to ensure that a maximum of direct and indirect contracts related to a major project are awarded to regional companies with a view to mutual benefits.

Public participation: All of the processes and activities related to information, consultation and active participation, allowing integration of the participants' concerns, needs and values into decision-making.

Mining project under construction and running-in: Phase corresponding to construction of the mining facilities up to the start of commercial production.

Mining project under deposit appraisal: Phase when all aspects of the mining project are appraised with greater precision. During this phase, all of the technico-economic studies leading to the performance of the mining project are carried out. It begins with publication of a first preliminary economic assessment (PEA) and ends with the decision to build the mining facilities.

Mining project under monitoring and maintenance: Temporarily closed mining site where all the infrastructures are maintained in monitoring and maintenance mode in view of eventual restarting.

Recycling: Action of transforming a residual material into an input or a marketable product.

Reserve: Refers to the economically viable part of the mineral resources of a deposit. Mineral reserves are defined by pre-feasibility or feasibility studies. Mineral reserves can be broken down into probable and proven. The degree of confidence given to probable mineral reserves is lower than that given to proven mineral reserves.

Northern territory: Québec territory located north of the 49th parallel, the St. Lawrence River and the Gulf of St. Lawrence.

LIST OF ABBREVIATIONS AND ACRONYMS

BAPE	Bureau d'audiences publiques sur l'environnement	MEQ	Ministère de l'Éducation du Québec
BCD	Bureau de coordination des droits	MES	Ministère de l'Enseignement supérieur
CAR	Conférence administrative régionale	MESS	Ministère de l'Emploi et de la Solidarité sociale
CDEPNQL	Commission de développement économique des Premières Nations du Québec et du Labrador	RCM	Regional county municipality
CDPQ	Caisse de dépôt et placement du Québec	MRIF	Ministère des Relations internationales et de la Francophonie
CSMO-Mines	Comité sectoriel de main-d'œuvre de l'industrie des mines	MRNF	Ministère des Ressources naturelles et des Forêts
EIJB	Eeyou Istchee James Bay	MSSS	Ministère de la Santé et des Services sociaux
ESG	Environment, Social and Governance	MTMD	Ministère des Transports et de la Mobilité durable
NREC	Fund Natural Resources and Energy Capital Fund	QPDCSM	Québec Plan for the Development of Critical and Strategic Minerals 2020-2025
HQ	Hydro-Québec	IESP	Integrated Energy System Planning
IDDPNQL	Institut de développement durable des Premières Nations du Québec et du Labrador	SDBJ	Société de développement de la Baie-James
INMQ	Institut national des mines du Québec	SIDEX	Société d'investissement dans la diversification de l'exploration
IQ	Investissement Québec	QSDCSM	Québec Strategy for the Development of Critical and Strategic Minerals 2025-2031
ISQ	Institut de la statistique du Québec	SOQUEM	Société québécoise d'exploration minière
CSMs	Critical and strategic minerals	SPN	Société du Plan Nord
MO	Departments and agencies	SRPNI	Secrétariat aux relations avec les Premières Nations et les Inuit
MAMH	Ministère des Affaires municipales et de l'Habitation	STIQ	Sous-traitance industrielle Québec
MEIE	Ministère de l'Économie, de l'Innovation et de l'Énergie		
MELCCFP	Ministère de l'Environnement, de la Lutte contre les changements climatiques, de la Faune et des Parcs		

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INTRODUCTION

Québec once again has the opportunity to make its mark and create wealth by capitalizing on its natural resources. *The Economic Vision 2025* expresses, in this respect, a clear ambition: to make Québec a true hub for critical and strategic minerals (CSMs), not only in North America, but also on the international stage.

Beyond the abundance of its CSM resources (see Appendix 1 – List of Québec’s critical and strategic minerals), Québec benefits from distinctive assets that strengthen its attractiveness, notably the stability of its business environment (political, economic and legal) which makes it a trusted partner. In a global context marked by market uncertainty and volatility, these advantages give Québec credibility and reliability sought by investors and industrial partners.

Québec is putting in place the levers to take full advantage of this strategic opportunity to develop the entire CSM value chain, by stimulating innovation and attracting investment. It also intends to maximize the economic benefits for Québec society as a whole by adding value to its minerals, from mining to processing and recycling.

A strategic opportunity to seize

The current energy and digital transition, as well as the growing needs in the security sector, require the growing contribution of CSMs, which Québec has at its disposal. The anticipated growth in demand for these products will be considerable over the next few years, thereby providing significant economic growth opportunities, both in terms of operations and processing.

Moreover, those who do not have access to these resources on their own territory will want to ensure a secure and reliable supply, because their economic security depends on it. As a result, they are striving to forge new strategic partnerships, which is putting Québec in an advantageous position. Historically recognized as a producer of base metals, mainly copper, nickel, zinc, iron and precious metals such as gold, Québec is now establishing itself as a rapidly evolving mining territory. Renowned for the mineral resources of its subsoil, it appears, thanks to its CSMs, to be in a strong position to become a player in the new global economy.

Québec currently produces several CSMs in varying volumes, mainly from mining, but also from tailings processing. These include nickel, cobalt, copper, certain

platinum group elements, lithium, natural graphite, niobium, scandium, gallium, tellurium, titanium and zinc. Québec is the only producer of niobium in the northern hemisphere, the only producer of natural graphite in North America, as well as the largest producer of lithium, in the form of spodumene concentrate, also in North America. Nevertheless, for several of these CSMs, there is untapped potential that could lead to increased production in the coming years. There is also untapped potential for rare earths and antimony, which are of strategic interest to several industries.

Compared to the rest of Canada, Québec is well positioned, with the country's largest calculated proven and probable graphite reserves (79% in 2024), as well as the majority of lithium reserves (81% in 2024). It is also home to one of the world's 10 largest hard rock lithium projects in terms of total resources. Québec also holds the main Canadian reserves for niobium, titanium, vanadium and phosphate, in addition to holding significant reserves of rare earth elements (in 2024, the province held 91% of the country's total combined reserves and resources), nickel, cobalt and zinc.

Québec is thus faced with a unique opportunity to create wealth and add value to the exploitation of its CSMs by promoting their processing here. These efforts will help strengthen established and emerging value chains, such as that of batteries and semiconductors, and develop new ones, thus contributing to the diversification and resilience of the Québec economy.

By choosing to rely on its CSMs, Québec is also choosing to strengthen its economic independence and secure its own supplies for its strategic development sectors. It

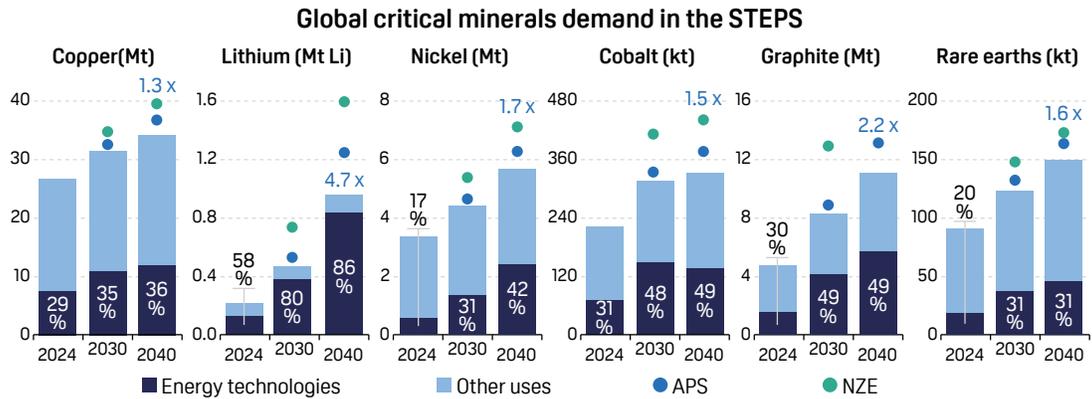
is also advantageously positioned on the world stage as a responsible and reliable supplier in the development of supply chains for minerals that are essential to the economies of today and tomorrow. This positioning enables it to increase its international influence while continuing its contribution to global efforts to reduce dependence on fossil fuels and, therefore, to support a greener and more sustainable economy.



The establishment of CSM value chains represents not only an opportunity for economic growth for Québec, but also a necessity to ensure its economic security.



Demand for critical minerals continues to rise in all scenarios, driven by the rapid deployment of energy technologies



Notes: STEPS (*Stated Policies Scenario*) = Scenario that takes into consideration current policies and measures. Mt = millions of tonnes. APS (*Announced Pledges Scenario*) = Scenario that takes into consideration the full compliance with all climate and energy commitments announced by governments. NZE (*Net Zero Emissions by 2050 Scenario*) = Scenario that takes into consideration the achievement of global carbon neutrality by 2050. Figures for copper are based on data for refined copper (excluding direct-use scrap). Those concerning rare earth elements only take into account rare earth elements used for the manufacture of magnets. Growth rates (number in blue) range from 2024 to 2040.¹

An impulse already given

In 2020, Québec led the way when it launched the Québec Plan for the Development of Critical and Strategic Minerals (QPDCSM), the first plan of its kind in Canada. This plan marked a turning point in the way Québec's mining future was conceived, by laying the foundations for an integrated vision of the development of the CSM sectors.

In this way, the QPDCSM laid the foundations for a business environment conducive to the growth of this sector and its related industries. Despite a global context marked by uncertainty, Québec has seen a marked increase in mining activity, notably driven by a significant influx of capital and the involvement of major new players in the field of mineral exploration².

Since then, the global context has changed radically. The energy and digital transition has accelerated, and CSMs now occupy an even more central place in government policies worldwide. Securing their supply has become an issue of national security and sovereignty. As a result, Québec finds itself at a pivotal moment, when it must convert the successes of recent years into strategic levers for creating collective wealth and meeting the economic, environmental, technological and geopolitical challenges that lie ahead of it.

1. Adaptation and translation of the figure *Global critical minerals demand in the STEPS*, from *Global Critical Minerals Outlook 2025*, by International Energy Agency, 2025, p. 85. Consulted on line [<https://www.iea.org/reports/global-critical-minerals-outlook-2025>] Licence : Creative Commons 4.0.

2. For more detailed results of the QPDCSM, see Appendix 2.

Unlike fossil fuels, which for the most part burn and are non-renewable, materials used in energy transition technologies are highly recyclable and therefore require less extraction of raw natural resources. According to the *Energy Transitions Commission*, for example, the total cumulative mass of materials needed for the global energy transition would be less than the mass of coal currently used in just one year (*Energy Transitions Commission, 2023*). However, even in optimistic scenarios of reuse, recycling and technological efficiency, the transition will inevitably require a significant increase in the extraction and exploitation of critical minerals (Walter et al., 2024, cited in Climate Institute of Canada, 2025).



DID YOU KNOW?

With **23 metallic and non-metallic substances** extracted, Québec is the largest producer of **lithium** and **high-purity iron** in Canada as well as the only producer of **graphite**. It is also North America's only producer of **niobium**, **scandium** and soon, **gallium**.



+ 50%

of mining projects*
(2019-2024)

* have reached the deposit appraisal stage



+ 274%

increase in expenditures on
exploration and development of
critical and strategic minerals
(2019-2024)



+ 20

active mines, 8 of which produce
CSMs



+ 50

mining projects that have reached
the deposit appraisal stage, more
than half of which are targeting
CSMs



+ 1,100

publicly known mineral exploration
projects, including over 600
related to CSMs



\$6.2 billion

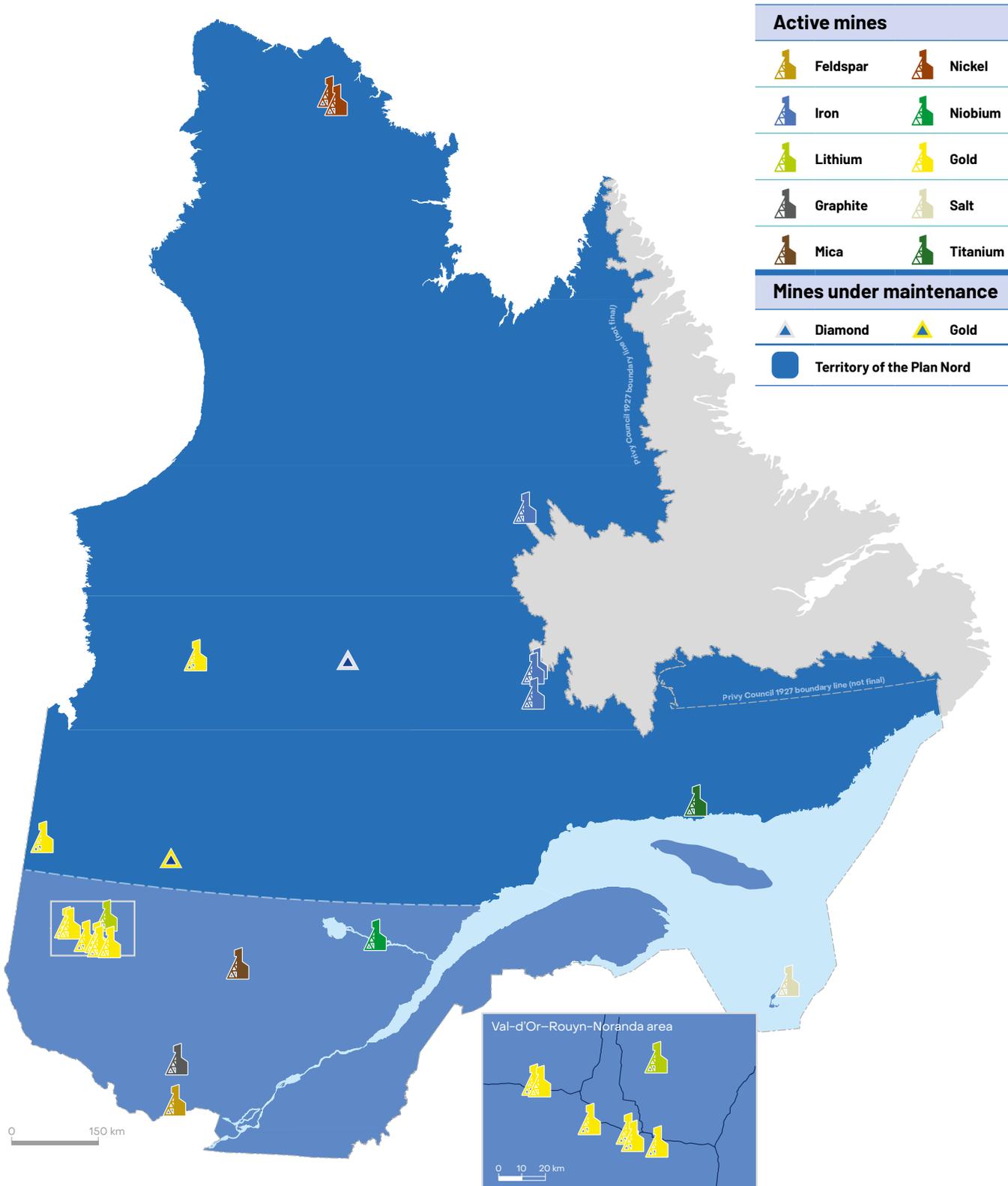
in private mining investments
(2024)



\$12.8 billion

in shipment value (sales of mining
products (2023), including \$1.9 billion
from CSMs (excluding high-purity iron
and aluminum)

Active mines and mines under maintenance in Québec



Active mines *	Metallic minerals
1- Fire Lake (ArcelorMittal Exploitation minière Canada)	Iron
2- Goodwood (Tata Steel Minerals Canada)	Iron
3- Lac Bloom (Minerai de Fer Québec)	Iron
4- Mont-Wright (ArcelorMittal Exploitation minière Canada)	Iron
5- North American Lithium complex (Elevera Lithium)	Lithium
6- Nunavik Nickel (Canadian Royalties)	Nickel
7- Raglan (Glencore Canada)	Nickel
8- Niobec (Magris Resources)	Niobium
9- Casa Berardi (Hecla Québec)	Gold
10- Canadian Malartic complex (Agnico Eagle Mines)	Gold
11- Goldex complex (Agnico Eagle Mines)	Gold
12- La Ronde complex (Agnico Eagle Mines)**	Gold
13- Eleanor (Dhilmar Canada)	Gold
14- Kiena (Wesdome Gold Mines)	Gold
15- Lamaque (Eldorado Gold Québec)	Gold
16- Westwood (IAMGOLD Corporation)	Gold
17- Lac Tio (Rio Tinto Fer et Titane)	Titanium

Active mines *	Non-metallic minerals
18- Othmer (Dentsply Canada)	Feldspar
19- Lac-des-Îles (Northern Graphite Corporation)	Graphite
20- Lac Letondal (Imerys Canada)	Mica
21- Seleine Mines (Windsor Salt)	Salt

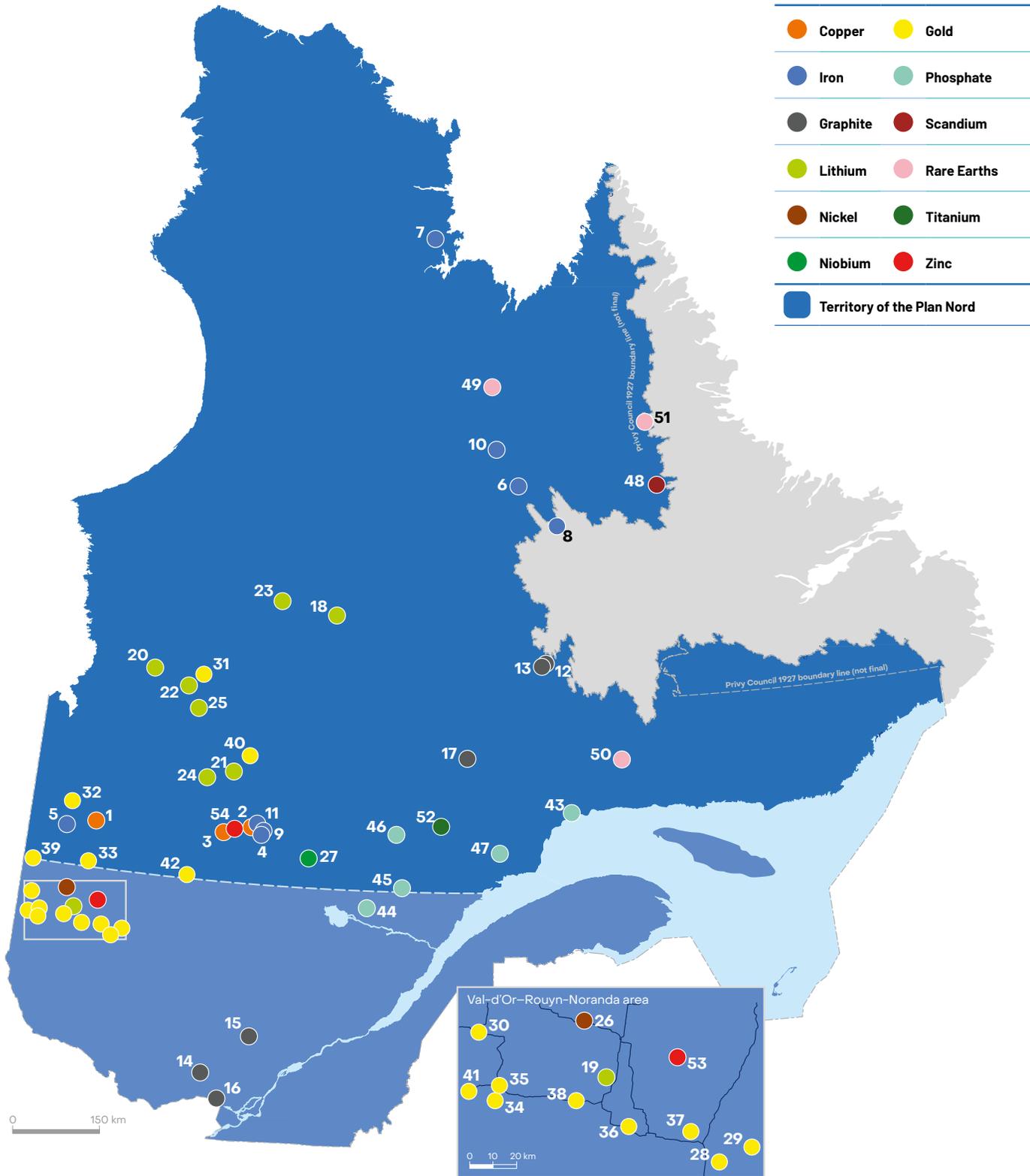
Mine under maintenance	Metallic Mineral
22- Lac Bachelor (Ressources Bonterra)	Gold

Mines under maintenance	Non-metallic minerals
23- Renard (Les Diamants Stornoway (Canada))	Diamond

* Mining operations subject to the Mining Tax Act

** Copper by-product

Mining projects in Québec



Mining projects	Minerals	Mining projects	Minerals
1- Caber complex (Nuvau Minerals)	Copper	30- Duparquet (Mines d'Or Duparquet)	Gold
2- Corner Bay complex (Cygnus Metals)	Copper	31- Eau Claire (Fury Gold Mines)	Gold
3- Opemiska (XXIX Metal Corporation)	Copper	32- Fenelon (Wallbridge)	Gold
4- BlackRock (Strategic Resources)	Iron	33- Géant Dormant (Mines Abcourt)*	Gold
5- Collines de fer (Barlow Métal)	Iron	34- Granada (Granada Gold Mine)	Gold
6- Full Moon (Century Global Commodities Corporation)	Iron	35- Horne 5 (Ressources Falco)	Gold
7- Hopes Advance (Oceanic Iron Ore Corporation)	Iron	36- Marban (Mines Agnico Eagle)	Gold
8- Houston (Fosse Malcolm)(Labrador Iron Mines Holdings)	Iron	37- Novador (Probe Gold)	Gold
9- Lac Dore Vanadium (VanadiumCorp Resource)	Iron	38- O'Brien (Ressources minières Radisson)	Gold
10- Lac Otelnuk (MetalQuest Mining)	Iron	39- Perron (Amex Exploration)	Gold
11- Mont Sorcier (Métaux Voyager)	Iron	40- Troilus (Troilus Gold Corporation)	Gold
12- Lac Carheil Graphite (Metals Australia)	Graphite	41- Wasamac (Mines Agnico Eagle)	Gold
13- Lac Knife (Focus Graphite)	Graphite	42- Windfall (Gold Fields)	Gold
14- La Loutre Graphite (Métaux Lomiko)	Graphite	43- Arnaud (Mine Arnaud)	Phosphate
15- Matawinie (Nouveau Monde Graphite)	Graphite	44- Begin-Lamarche (Corporation First Phosphate)	Phosphate
16- Miller (Canada Carbon)	Graphite	45- Lac à l'Original (Corporation First Phosphate)	Phosphate
17- Uatnan (Nouveau Monde Graphite)	Graphite	46- Lac à Paul (Arianne Phosphate)	Phosphate
18- Adina (Winsome Resources)	Lithium	47- Nathalie (Baie Comeau minéral)	Phosphate
19- Authier (Elevra Lithium)	Lithium	48- Crater Lake (Scandium Canada)	Scandium
20- Galaxy (Rio Tinto Lithium Canada)	Lithium	49- Ashram (Mont Royal Resources)	Rare earths
21- Moblan (Elevra Lithium)	Lithium	50- Kwjibo (SOQUEM)	Rare earths
22- Rose Lithium-Tantale (Corporation Lithium Éléments Critiques)	Lithium	51- Strange Lake / B-Zone (Métaux Torngat)	Rare earths
23- Shaakichiuwaanaan (Ressources PMET) Lithium	Lithium	52- La Blache (Temas Resources Corporation)	Titanium
24- Sirmac-Dike #5 (Vision Lithium)	Lithium	53- Abcourt-Barvue (Mines Abcourt)	Zinc
25- Whabouchi (Nemaska Lithium)*	Lithium	54- Lac Scott (Les Ressources Yorbeau)	Zinc
26- Dumont Nickel (Dumont Nickel S.E.C)	Nickel		
27- Crevier (Les métaux Niobay)	Niobium		
28- Chimo (Cartier Resources)	Gold		
29- Croinor Gold (Probe Gold)	Gold		

* Mining project under construction and running-in



TAKING THE NEXT STEP THE QUÉBEC STRATEGY FOR THE DEVELOPMENT OF CSMS 2025-2031

The Gouvernement du Québec is today taking a significant step in the realization of its economic vision, through the responsible development of value chains that benefit the economy of the host regions and communities.

This is the background to the Québec Strategy for the Development of Critical and Strategic Minerals 2025-2031 (QSDCSM). It sets out an overall vision and concrete actions that will build on the strengths of the community, Québec's expertise and open dialogue with Indigenous and local communities.

By presenting an ambitious and promising strategy on CSMS, recognizing their potential for the future, the government is expressing its vision of a Québec that is a key leader in the exploration, production, processing and recycling of CSMS.

Its **objective** is to enable Québec to seize the opportunity to create wealth through integrated sectors, while becoming a key source of value-added products essential to the global energy and technological transition, by mobilizing its natural resources, expertise and industrial capacity.

However, Québec's position as a leader in this emerging sector will not be built overnight: it is a long-term project that will require several years of concerted efforts, sustained investments and strategic partnerships to fully realize its potential.



Building on its achievements in recent years, Québec is fully up to the new challenges that it faces in order to continue the development of CSMs. Meeting these challenges is the inspiration for the government action presented in the Québec Strategy for the Development of Critical and Strategic Minerals.



As a component of the development of the QSDCSM, the Ministère des Ressources naturelles et des Forêts (MRNF) organized a series of discussion workshops³ with stakeholders in the development of the mining sector and value chains, with the aim of identifying a common vision. As such, three guiding principles have been adopted:

- » support the competitiveness of Québec's mining and processing industry;
- » foster wealth creation for Indigenous and local communities, regions and Québec;
- » apply the principles of responsible development and circular economy across the board.

In addition, these discussion workshops were a continuation of the efforts made over the past five years to guide Québec's mining development in a responsible and concerted manner. They served to identify the challenges to be met that call for action by the Gouvernement du Québec and all stakeholders in Québec's mining development. These exchanges made it possible to define **four priority orientations** to consolidate and strategically advance Québec's position.

3. See Appendix 3 – Discussion workshops.

Orientation 1: Improve the business environment and accelerate projects.

It is essential that mining projects develop at a sustained pace, and the government must ensure that project approval times are kept to a minimum, while maintaining rigorous oversight. This business environment, along with Québec's strategic positioning on the international scene, are key factors in attracting the significant investments that are necessary for the development of CSM projects.

Orientation 2: Develop the entire CSM value chain.

This includes the realization of mining projects, which requires both continued mineral exploration and support for investment in the development and mining of the most promising deposits. However, to maximize the benefits, it is also necessary to develop the processing sector, which raises a whole series of technical challenges related to processing operations, access to energy, access to manpower and investment in technologies. The entire chain therefore needs to be developed, right through to recycling, with a view to the circular economy.

Orientation 3: Plan and develop strategic logistics infrastructures.

Access to the territory is a major challenge for the mining of our resources, as is the ability to transport raw materials to processing sites and, eventually, the shipment of our exports to markets.

Orientation 4: Engaging partners and maximizing community-level benefits are critical to the success of the Strategy.

As such, it is essential that development be carried out in collaboration with the Indigenous and local communities of the territories in question, in order to promote the harmonious development of projects in their host community. Within the ecosystem, the link between the different actors in the chain must continue to be strengthened. And on an international scale, Québec's position as a leader in CSM sectors is a key issue in an ever-changing geopolitical context.

The Strategy's implementation is supported by a total budget of \$88.1 million for the 2025-2031 period, obtained through the 2025-2026 Budget Plan. Under the same plan, the Ministère de l'Économie, de l'Innovation et de l'Énergie (MEIE) obtained a sum of \$15.0 million to assess the feasibility of optimizing rail transport from the Labrador Trough, which will also contribute to the Strategy.

In addition, certain actions carried out within the framework of other programs or policies, supported by partner departments and agencies, will contribute to the development of CSMs. Their implementation is estimated at \$14,657,000.

- » \$11,657,000: 2023-2028 Northern Action Plan of the Société du Plan Nord (SPN);
- » \$3,000,000 from the MEIE budget envelope.

As such, \$29.657 million will be added to the \$88.1 million, i.e. a total of \$117.757 million of direct financial resources as part of the Strategy for the 2025-2031 period. In addition to this amount, there are a number of important existing levers, including the \$1.5 billion Natural Resources and Energy Capital Fund (NREC Fund) alone, as well as many other government intervention tools, which can contribute to the objectives of this strategy, without being specifically dedicated to it.

The QSDCSM also relies on a series of equally decisive non-financial governmental actions. It is in line with and complementary to several public policies of the Gouvernement du Québec, ensuring the alignment of

the development of the Québec mining sector with the economic, environmental and social targets established in government strategies and plans. This consistency in government action is a key success factor for the Strategy, since it enables the entire mining ecosystem and host communities to benefit from coherent measures adapted to the diversity of their realities. The list of the main plans and strategies that act in synergy with the QSDCSM can be consulted in Appendix 4 – Consistency and complementarity with Québec’s public policies in force.

The management of mineral resources is within the exclusive jurisdiction of Québec, which through this strategy indicates its development priorities. Within this framework of competence, Québec will also be able to benefit from the contribution of the federal government, which has also made the development of critical minerals a priority, and could contribute to the development of this sector in Québec, in line with the orientations and action priorities of the Gouvernement du Québec.

Main other envelopes that can contribute to the Strategy’s objectives	Amounts
Québec Infrastructure Plan (mining regions)	\$1,923 M
The NREC Fund (IQ-MEIE, MRNF, MFQ)	\$1,500 M
Enhancement of the Resource Tax Credit relating (MFQ)	\$27 M
NQ Investissement minier Fund (SDBJ, ARBJ)	\$17 M
Recovery of by-products from the battery sector – CRIBIQ (MEIE)	\$4 M
Non-exhaustive total	\$3.471 billion

Targeted effects

The performance of a government strategy is measured by the effects and consequences of its interventions on the target clientele.

The MRNF has defined five impact indicators that will make it possible to monitor the evolution of the impacts of the interventions, implemented within the framework of the QSDCSM, on the entire ecosystem gravitating around the field of CSMs:

- 1- Increased mining investment;
- 2- Progress of CSM mining projects in Québec;
- 3- Evolution of innovative solutions for the CSM field;
- 4- Improved host communities' perception of CSM projects;
- 5- Increased circularity rate in the mining sector.

In a rigorous legal context

In Québec, mining development is part of a structured legal and regulatory framework, notably through the Mining Act (chapter M-13.1), which sets out the rules relating to the issuance of mining rights, such as exclusive exploration rights and mining leases. This law is based on the premise that mineral resources belong to Québec and must therefore be developed in the collective interest, while specifying the obligations of mineral rights holders, notably in terms of site restoration, the circular

economy and relations with Indigenous and local communities. The mining regime coexists with other laws, such as the Environment Quality Act and laws relating to conservation, forests, wildlife, public land and its management. Québec therefore has a defined, stable and recognized regulatory framework that promotes predictability and sustainable, responsible development of mineral resources.

In addition, the Québec mining tax system enables the State to obtain fair compensation for the exploitation of a resource belonging to the public domain. As such, the State collects mining tax fees (commonly known as royalties) from mining operators in Québec. The system is governed by the Mining Tax Act.

All mining projects in southern Québec are subject, before being authorized by the government, to the environmental impact assessment and review procedure, which includes a public information and consultation process led by the Bureau d'audiences publiques sur l'environnement (BAPE). Mining projects in Eeyou Istchee James Bay and Nunavik are subject to the environmental and social impact assessment and review procedure, in accordance with the provisions of chapters 22 and 23 of the James Bay and Northern Québec Agreement.

Finally taking account of the rights and interests of the Indigenous communities is an integral part of reconciling mining activity with other land use options.

 Mining development takes place within a legal, regulatory and contractual framework that guarantees the predictability and stability of activities. 

**Supported by
the best practices
in terms of social
acceptability**

CSM mining projects are expected to play a structuring role in the global energy and technological transition, as well as in the economic development of Québec. However, their development is greatly influenced by social acceptability in the regions and communities where these projects take place.

Québec has adopted its own approach to social acceptability. Constantly evolving, it is part of a logic of continuous improvement, leading the government to integrate the best practices into its ways of doing things, while asking mining proponents to do the same. This approach is reflected as much in the analysis of projects as in the development of public policies and the legislative framework. The influencing factors targeted by the MRNF also guide

the drafting of the entire QSDCSM and reflect a vision of social acceptability that goes beyond community relations to encompass all of the practices that guide the development of a mining project (see Appendix 5 – Mineral development process).

The government is also improving its ground-level support offers, both to help the Indigenous and local communities that are hosting mining development to better understand and get involved in projects, and to help proponents understand legal expectations and the best practices that should be adopted.

The development of a mining project involves a series of steps. At each of these, the integration of sustainable development principles into the project analysis is essential. In accordance with government guidelines, public policies, financial assistance programs and project evaluation grids must incorporate sustainability criteria. Consequently, a mining project must demonstrate its compliance and alignment with sustainable development principles throughout its development.



ORIENTATION 1.

IMPROVE THE BUSINESS ENVIRONMENT AND ACCELERATE PROJECTS

What challenges does it address?

In order to foster and accelerate the development of new mines and new sectors, a competitive business environment must be ensured while taking into account, with a view to strategic efficiency, all environmental, technical and socio-economic dimensions. Despite the resurgence of a more protectionist vision of the economy in many countries, capital remains mobile and Québec must set itself apart to attract the necessary investments on its territory.

The legal and regulatory environment is one of the main factors influencing mining investment. Indeed, the legal and regulatory environment for the mining sector in Québec remains complex. Mining proponents must devote considerable time and effort to meeting certain government requirements.

Reminder of actions already taken

Implementation of the revised Mining Act (Act 36)

In November 2024, the Act to amend the Mining Act and other provisions (L.Q. 2024, chapter 36) was adopted by the Québec National Assembly. This law gives concrete expression to the government's commitment to modernize the mining regime following the participatory approach "For a harmonious development of mining activities" launched in the spring of 2023. Social acceptability issues as well as the desire to promote the processing of mineral resources on Québec soil and to secure their supply, to develop the circular economy and to limit speculation have prompted the government to act and modernize the mining regime.

Regulatory streamlining process

The aim of the government's policy on regulatory and administrative streamlining is to better regulate and counteract the burdens imposed on businesses, thereby helping to maintain a business environment conducive to their development. To this end, efforts are continuing to streamline the processes for granting authorizations, rights and permits, and to enable a mine to go into production more quickly, in compliance with the laws and regulations in force.

Bureau de coordination des droits

The MRNF's Bureau de coordination des droits (BCD) project was launched in 2019 to reduce the time required to grant the rights (permits and authorizations) necessary to carry out a mining project in Québec, without compromising on regulatory requirements.

Coordinated by the MRNF, this government project is being carried out in collaboration with four other departments and agencies, as follows:

- » Ministère de l'Environnement, de la Lutte contre les changements climatiques, de la Faune et des Parcs (MELCCFP);
- » Ministère des Affaires municipales et de l'Habitation (MAMH);
- » Ministère de l'Économie, de l'Innovation et de l'Énergie (MEIE);
- » Société du Plan Nord (SPN).

The BCD is part of a drive for sustainable regional economic development, and it is initially targeting the Québec mining sector. In the long term, other business sectors will be able to benefit from the work of the BCD.

Work to remove duplication of environmental assessments

Based on the principle of "one project, one environmental assessment, one decision", notably by requesting that the need for a federal assessment be eliminated for projects that fall primarily under provincial jurisdiction, Québec wishes to offer mining proponents a clear, consistent process that complies with the highest standards of environmental protection. Québec relies on best practices in the restoration and redevelopment of lands affected by mining activity and emphasizes public participation and consultation with Indigenous communities at all stages of the process to promote the harmonious development of mining projects in host communities.

What we want to achieve by 2031

The Gouvernement du Québec is committed to developing its business environment by prioritizing actions that serve to lighten the administrative burden of mining proponents.

Reduce the administrative burden associated with mining projects

Without reducing the scope of requirements and obligations, it is possible to simplify processes and make them more efficient and faster in order to facilitate the realization of mining projects. Innovation within the government itself needs to be promoted, as does personalized support for companies.

Accelerate the environmental assessment procedure for projects

In recent years, a number of initiatives have been undertaken to optimize the environmental standards framework. These initiatives help to simplify and reduce the administrative burden for the clientele in question, while ensuring adequate environmental protection.

A concrete example of this commitment can be found in the MELCCFP's overhaul of its environmental impact assessment

and review procedure. At the end of this overhaul, departmental deadlines will be reduced to nine months, which is almost twice as fast as the current 13 to 18 months, thanks to a smoother and better structured sequence. The transition to paperless processes will reduce red tape, while clarifying requirements will provide greater predictability for initiators.

The early integration of public consultations is intended to strengthen social acceptability and promote harmonious planning. Overall, these measures will accelerate the development of mining projects, while maintaining the rigour and transparency of environmental assessments.

Facilitate the issuance of rights, permits and authorizations

The MELCCFP is also committed to a process of continuous improvement. As such, it continues to optimize its analysis process in order to reduce administrative formalities for applicants for environmental authorizations. It has taken concrete steps to reduce the processing time of ministerial authorization requests through a commitment in its Declaration of Services to Citizens that a decision would be rendered within 75 working days for 85% of requests. The achievement of this target is promoted by various measures such as the streamlining and simplification of the Regulation on the supervision of activities according to their impact on the environment, the improvement of the delivery of online services and the creation of modern forms. The deployment of a pre-submission meeting process also enables project initiators to benefit

from support prior to the submission of their authorization application, thus encouraging the filing of a complete and compliant application.

To ensure better management of administrative timelines in the allocation of rights and authorizations, and to better coordinate and optimize processes for issuing these rights and authorizations, the following work will continue within the government:

- » Regional interministerial panels intended to offer mining proponents custom-made support, adapted to the regional realities depending on the context and the evolution of their projects;
- » Optimization of permitting processes in order to eliminate non-value-added steps, reduce administrative delays and increase the quality of the services rendered;
- » Creation of a service counter in order to offer mining industry clients a one-stop service combining the information and transaction services relating to mining rights and authorizations;
- » Governmental coordination of Indigenous consultations among government departments that issue rights, to avoid multiplication of consultation approaches for the same project and favour the establishment and maintenance of harmonious relations based on dialogue, trust and mutual respect between the departments concerned and the Indigenous communities.

By reducing the time required to obtain rights, permits and authorizations, Québec's mining industry will be more productive, improving its competitiveness compared to other states, provinces or territories that are striving to attract investment.

On December 9, 2025, Bill No. 5, which aims to accelerate the granting of authorizations for priority projects of national scope, was presented to the National Assembly. It proposes to establish a single authorization process, based on collaboration between departments, public bodies, municipalities and Indigenous communities, in order to simplify and accelerate the implementation of strategic projects. By reducing administrative complexity and ensuring better coordination between the actors involved, the new framework will promote predictability, speed of execution and investor confidence.

The bill provides for the centralization of government authorizations, while respecting current legislation, environmental assessments, public health and safety, and the rights of Indigenous communities. It also ensures process transparency by publishing key information, including designation notices, single authorizations, implementation conditions and timelines, BAPE reports, if applicable, and an annual project progress report.

Actions that will be carried out

- 1- Facilitate the issuance of rights, permits and authorizations, notably through:
 - » acceleration of the work on regulatory and administrative streamlining;
 - » the development of a service offer to facilitate the steps taken by proponents.



ORIENTATION 2.

DEVELOP THE ENTIRE CSM VALUE CHAIN

What challenges does it address?

The development of mining projects for certain underdeveloped or undeveloped CSMs presents additional technical challenges compared to that of minerals traditionally produced in Québec. Indeed, right from the exploration stage, in addition to evaluating the size and richness of a deposit, it must also be demonstrated that the CSMs in question can be extracted from the rock matrix. Subsequently, during deposit development, the proponents must prepare an ore processing procedure which, in some cases, is only mastered by a limited number of countries. The same issues apply to industrial processing methods, which also need to be defined and made profitable, often through the development of technologies involving circular economy strategies. These additional activities, specific to CSMs, generate additional development costs compared to those of mining traditional minerals and metals. At the same time, as several CSMs are not listed on the stock exchange, their price will depend on the agreements to be concluded between the producer and the buyer, or

user, of these CSMs through long-term supply contracts (commonly known as “*offtake*” agreements). As such, project proponents must be able to sell their production to strategic partners even before the construction of the mine or plant.

In order to promote the development of new mines and new sectors, in a highly competitive international context, and to optimize the development of CSMs in its territory, Québec must perform well at all stages of the value chain, from CSM exploration to recycling, both technically and economically as well as commercially. Adequate support for mining and industrial projects, from exploration to tailings reclamation, including mining and processing, is necessary to ensure responsible and efficient development of CSM value chains for the benefit of the entire population.

Reminder of actions already taken

Growing stakeholder ecosystem

The government is supporting the establishment of innovation zones⁴ that stimulate investment in cutting-edge technology sectors using CSMs. Four zones have already been recognized and a fifth, focused on mining innovation, is currently under consideration⁵. The set-up of innovation centres leading to the ramp-up of processes will contribute to the realization or strengthening of sectors promoting Québec's CSMs.

In addition to these hubs, Québec benefits from a strong research, development and innovation ecosystem, notably grouped within the Scientific Research Network Specific to CSMs (Réseau MCS) established under the QPDCSM⁶. This ecosystem contributes to advancing knowledge, supporting companies and strengthening emerging sectors. The government has also set up the Observatoire national de l'amiante, whose mandates include, among other things, the identification of best practices and scientific monitoring.

Proven financial assistance programs

The various financial assistance programs⁷ for research and innovation that have resulted from the implementation of the QPDCSM have been a resounding success. These programs, combined with studies on environmental contaminants, have advanced our knowledge on CSMs, for the benefit of the relevant sectors. There must be ongoing efforts to find innovative solutions that will meet the challenges faced by the various stakeholders in the field. Indeed, the control of the extraction processes of certain CSMs, for example, remains an important issue, as does the treatment of mining residues resulting from their extraction. It is necessary to appropriate knowledge and develop green and innovative technologies that will allow Québec to stand out from the competition. The Réseau MCS has succeeded in bringing together stakeholders and moving them forward with common research objectives. Collaborative and pre-competitive research can thus be carried out and benefit as many people as possible.

Finally, the integration of circular economy strategies must be prioritized in knowledge acquisition and innovation projects in order to maximize the sustainable sourcing of CSMs.

4. [Creation of innovation zones | Ministère de l'Économie, de l'Innovation et de l'Énergie \(gouv.qc.ca\)](#).

5. [Mining Innovation Zone – People at the heart of the transition \(zoneinnovationminiere.com\)](#).

6. [Mission and values of the Réseau MCS-CRITM](#).

7. CSM mining exploration support program, Axis 7 of the FRQ partnership program, R&D support program for the extraction, processing and recycling of CSMs (CRITM), R&D support program for the circular economy applied to CSM sectors (PRIMA), CSM Network project support program, Scale-up support program for mineralurgical and primary CSM processing procedures.

Natural Resources and Energy Capital Fund (NREC) and local processing

It is the intention of the government to encourage the responsible development and processing of natural and energy resources, so that Quebecers can participate directly, as shareholders, in the profits of the companies in question.

The NREC Fund has an envelope of \$1.5 billion for investment projects, notably in support of the Québec Battery Industry Development Strategy (Stratégie québécoise de développement de la filière batterie) and the QPDCSM. Through the NREC Fund, Investissement Québec (IQ), as the government's agent, has made investments in CSM mining projects that have already undergone a preliminary economic assessment in compliance with current standards.

In addition, the MEIE has various financing tools and programs at its disposal to support, through IQ, manufacturing investments in the processing of mining resources into higher value-added products in Québec.

Between 2020 to 2025, IQ granted nearly \$1 billion in assistance for secondary processing of CSMs, and almost as much for tertiary processing, thereby demonstrating the government's commitment to investing in the entire Québec value chain, from the mine to value-added products. The government intends to continue in the same direction, building on the financing tools already available.

Société québécoise d'exploration minière

SOQUEM, a subsidiary of IQ, is a leading player in mineral exploration in Québec. It capitalizes on innovation, research and strategic minerals.

SOQUEM's mission is to encourage exploration, discovery and deposit appraisal of Québec's mineral resources. It has participated in and contributed to the startup of hundreds of projects that have led to major discoveries of lithium, niobium, rare earth elements and several other mineral substances, which makes it one of the most prolific exploration companies in Québec. SOQUEM's discoveries have led to the production launch of several mines, three of which are currently producing mines, and contributed to the creation of more than 1,000 jobs in Québec.

Tax measures to support the mining industry

Mining companies benefit from a range of tax measures available throughout the mineral development process:

- » In March 2025, the government revised the resource tax credit, granting an enhanced tax credit rate in favour of eligible CSMs and an expansion of eligible expenses in respect of mineral resource development work.
- » The flow-through share plan enables mining companies to issue flow-through shares and, in return, they undertake to carry out exploration or development work for an amount equivalent to the amount of the flow-through share issue and to renounce the deduction of these expenses in favour of its investors. This scheme provides mining

companies with liquidity before work begins.

- » With the aim of stimulating the realization of major investment projects, the 2023-2024 budget introduced the new tax holiday for large investment projects (NCF-GPI). The government has chosen to extend the scope of the scheme to include the extraction of certain CSMs.
- » The Québec's mining tax system also provides for various deductible allowances in calculating an operator's mining profit, notably for the development of CSMs. The plan also provides for other allowances to support mining companies in the development of their projects, notably including exploration allowances, pre-production development allowances and amortization allowances.
- » As part of the 2025-2026 budget, the government has announced the introduction of a new tax assistance scheme for innovation.

NQ Investissement minier

The Gouvernement du Québec has mandated the Société de développement de la Baie-James (SDBJ), in collaboration with the Administration régionale Baie-James, to create NQ Investissement minier, an investment fund with an initial capitalization of \$17 million, specialized in financing mining companies in the Nord-du-Québec administrative region.

SIDEX

The Société d'investissement dans la diversification de l'exploration (SIDEX) is a limited partnership between the Gouvernement du Québec and the Fonds

de solidarité FTQ. With an investment budget of over \$50 million, SIDEX contributes to the diversification of mineral substances and the exploration of new territories by financing exploration companies active in Québec.

International brand image

Over the past five years, promotion and representation activities with investors, strategic partners and foreign governments have enabled Québec to stand out from the rest on the international stage, resulting in over \$1.7 billion in foreign investment in exploration and development of CSMs. However, the race for CSMs has intensified. There is strong competition with other mining regions. Québec must continue its efforts to maintain its brand image. To stand out from its global competitors, Québec must, in addition to showcasing its mining potential and expertise, focus on the traceability of its supply chains and demonstrate how the highest standards of environmental, social and governance (ESG) factors are met.

Contribution of federal programs

The Canadian Critical Minerals Strategy combines fiscal and financial incentives, targeting all stages of the value chain such as: the Critical Mineral Exploration Tax Credit, the Strategic Innovation Fund (\$1.5 billion), the First and Last Mile Fund for upstream and mid-value chain support (\$1.5 billion until 2029-2030), a \$2 billion Sovereign Wealth Fund for CSMs to invest in projects, and budgets to support, among other things, the development of processing technologies and the development of a critical minerals storage mechanism to

strengthen national security. These will be detailed in Canada's future Defence Industrial Strategy.

What we want to achieve by 2031

Although many initiatives are at the implementation stage, it is necessary for the Gouvernement du Québec to help reduce the technological, economic and commercial risks of projects in order to attract industrial partners and investors, both institutional and private. To this end, Québec will support mining and industrial proponents, notably by providing them with effective financial and support tools that will enable them to stand out on the international scene and become stakeholders in complete and responsible value chains.

Encourage mining exploration

Discovery of new deposits

In the QPDCSM, to highlight Québec's CSMs, the acquisition of knowledge on mining potential was an important part of the work to be carried out for the benefit of the mining sector. Continued efforts are needed to support the mineral exploration sector in order for it to be able to find new quality deposits and, thus bring development opportunities to fruition. We must also capitalize on the processing of newly acquired knowledge by making greater use of artificial

intelligence to leverage knowledge and develop mining potential.

Support for preliminary economic evaluations

Support for geometallurgy and geoenvironmental studies under the QPDCSM has helped fill important gaps in the Québec mining sector in these areas. In order to accelerate the completion of preliminary economic assessments and to promote the progress of projects, it is important to continue in this direction.

Stimulate mining and development

Process development support for mining and processing projects

Under the QPDCSM, research and innovation projects in the CSM sector have enabled Québec to intensify its innovative culture and showcase its expertise. In all, over \$50 million have been invested in CSM exploration, extraction, processing and recycling projects. The results are convincing, but efforts must continue in order to keep up the pace and push further the quest for technological solutions to benefit CSM mining and processing projects in Québec.

Research and innovation are at the heart of the economic vision of the Gouvernement du Québec. For mining projects to develop in harmony with their host environment and lead to wealth creation, they need a dynamic ecosystem in which research institutions work in synergy with companies. Advancing the level of technological maturity

and scaling up innovations will enable Québec to set itself apart and create development opportunities in CSM-related sectors.

Digital transition

The digital transition of mines has been underway for several years now, but it needs to accelerate to meet current challenges. Like many other Québec industries, the integration of new technologies, such as artificial intelligence or the Internet of things, is enabling mines to improve their productivity and establish an innovative culture, a true showcase demonstrating that the sector is truly forward-looking.

It is in the interest of large-scale mining companies, and also of small and medium-sized companies in the mining ecosystem, to capitalize on the competitive advantages offered by the use of new technologies. Québec has the resources and knowledge to find new ways of reducing the environmental impact of mining activities, promoting the social acceptability of projects and dealing with labour shortages.

Attracting capital and strategic partners

Substantial capital injection is required for the development of mining projects and their progress towards commercial production. Efforts must continue to ensure that projects can access the required capital. Many governments are busy implementing their own strategies to attract investors who will inject the capital that they need to succeed. The advantages of Québec and its projects must be continually promoted to potential investors, and also to strategic industrial partners, within

the framework of guaranteed long-term supply contracts (“*offtake*”). As such, with the support of IQ International and the network of Québec representations abroad, Québec will continue to organize trade missions and promote the advantages that it offers through targeted activities in partner countries to promote business opportunities in the mining sector and foster Québec’s integration into these countries’ value chains through industrial partnerships.

Actions that will be carried out

- 2- Promote the discovery of new deposits
 - » Completion of surveys in order to acquire geoscientific knowledge
 - » Integration of artificial intelligence to enhance mining potential
- 3- Accelerating the completion of preliminary economic assessments
 - » Support for the completion of geometallurgical and geoenvironmental studies
- 4- Support the development of projects related to mining development
 - » Support for research and development for the extraction, processing and recycling of critical and strategic minerals
 - » Support for the scaling of mineral or primary processing for critical and strategic minerals.

- » Support for projects of the Scientific Research Network Specific to Critical and Strategic Minerals
 - » Support for technological research and development for the circular economy applied to critical and strategic minerals sectors
- 5- Stimulating the digital transformation of mines
- » Support for the MISA Group's VORTEX course
- 6- Promote business opportunities to foreign investors
- » Participation in international and national activities
 - » Organization of trade missions

Take advantage of processing

To take full advantage of the development of our CSMs, the government will make midstream and downstream processing them in Québec a priority.

CSM midstream and downstream processing are key links in value chains that generate high added value for Québec and could be further developed. Support for those links is essential.

Adapt intervention tools to the reality of CSMs

The processing and marketing of certain CSMs is particularly complex compared to that of other minerals traditionally produced in Québec and requires special support.

The NREC Fund is one of the government's main levers of intervention in this area. Although Québec already has a number of tools to support the development of mining and processing projects, it remains important to ensure that the provisions of the NREC Fund are adapted to the specific needs of CSM projects, while taking into account the risks that they may entail.

These reflections will be informed by the support provided to project developers to operate or process CSMs, and by the experience gained from recent investments. In addition, an interdepartmental working group (MRNF-MRIF-MEIE) on the CSM trade was set up in May 2024. In line with G7 initiatives on these subjects, the working group is notably looking at various measures to counter unfair practices in the CSM markets, as well as how to support Québec and its businesses in a context of trade uncertainty with certain partners. Some of the analyzed financial measures could potentially help reduce business risk for investors and catalyze private investment, while promoting greater control by Québec over its CSMs and accentuating their local processing.

However, given the financial needs associated with the development of CSM mines and processing projects, it will be important to rely on partnerships with the private sector, the Canadian government or allied countries in order to share the risk in a balanced way and enable the Gouvernement du Québec to maintain its capacity to intervene with companies.

With a view to maximizing the processing of resources on its territory, Québec aims to obtain its fair share of all federal investments intended for the development of mining projects and hopes that the initiatives implemented by the Government of Canada will promote CSM processing in Québec.

Promoting the development of integrated sectors

Québec has developed elements of the battery value chain that cover the stages from mining, to processing into intermediate products, to the components that make up battery cells, including recycling. Efforts in this direction will be pursued to consolidate supply chains in this sector, with a view to realizing the vision of a Québec able to meet demand.

In addition, existing sectors such as aeronautics, semiconductors, optics and photonics would benefit from being connected to sources of raw materials, mines and primary processing plants, which are also in Québec. These sectors, particularly those linked to the security industry, can play a pivotal role in strengthening the commercial ties of Québec companies within Canada, as well as with the United States and Europe, in these most strategic niches. In particular, it is mutually beneficial for Québec and the U.S. to work together more closely to develop integrated, competitive Canada-U.S. value chains, to counterbalance certain monopolies.

The financial tools used to support the development of these sectors will be

those best suited to achieving these objectives.

Implementation of traceability

The introduction of regulatory requirements, in Europe⁸ and in other places, could make it difficult for Québec suppliers to access these markets without adopting traceability systems. It is important for Québec to put in place the financial support mechanisms that will allow it to be upstream of the requirements of its economic partners and to promote its many advantages, notably including its low carbon footprint, while demonstrating to them the origin of what we produce. Traceability will help stimulate the growth of CSM chains by attracting additional investment.

8. From 2027, the European Union will require a battery passport to accompany all batteries sold or integrated into electric vehicles on its territory

Actions that will be carried out

- 7- Establish or develop local processing activities to promote the consolidation of value chains by profiling the environment that supports processing in Québec, notably through:
 - » the adequacy of financial tools with the needs of the sectors;
 - » the continuation of the work of the interministerial working group on trade in CSMs;
 - » the start of discussions on partnerships with foreign funds.

- 8- Supporting the implementation of CSM traceability in companies, for the benefit of market development, through:
 - » a support program for the implementation of traceability systems.

Structure CSM value chains around circular economy strategies

Acquisition of knowledge to promote tailings reclamation

Mine tailings contain CSMs that could eventually be recovered and recycled, thereby helping to generate high added value for Québec. They are found both in the tailings storage facilities of mining companies and in tailings ponds under the responsibility of the State. Very few tailings are currently recovered commercially, and government support is needed to enable the still embryonic development of these value chains.

It is important to continue acquiring knowledge about tailings storage facilities content in order to better characterize their potential and the constraints that may be associated with them. This information will help target recovery opportunities for substances of interest, reduce the environmental footprint of sites and extend their economic usefulness.

Circularity of the mining sector

More broadly, integrating the circular economy into CSM value chains will help maximize the quantity of CSMs produced in Québec and limit the waste of these resources, all from a perspective of responsible, sustainable development. By optimizing the use of existing resources, Québec will be able to create new supply chains based on secondary materials. This approach will stimulate innovation, reduce dependence on raw materials and help make Québec a world leader in the sound management of its mining resources.

Actions that will be carried out

- 9- Implement all elements of the value chain related to the recovery of tailings, notably through:
 - » continuation of the work of the knowledge acquisition approach on tailings storage facilities content;
 - » support for the acquisition of knowledge on asbestos management.

- 10- Integrate the circular economy into the CSM value chains, through:
 - » completion of an assessment on the circularity of the Québec mining sector;
 - » the provision of support for the revision of opportunity studies, in order to make the most of the data collected in the course of these studies;
 - » the development of a service offering from the network of agents on industrial synergies for the mining sector.

Projects moving forward

In 2020, 17 CSM projects had passed the preliminary economic assessment stage to enter the development phase, representing 57% of all mining projects that had passed this stage (according to the 2024 list). By November 2025, this number had more than doubled, with 37 CSM projects accounting for over 66% of the total 54 mining projects. In terms of exploration, Québec had 249 projects targeting CSMs in 2020. By 2025, this figure had risen to 472.

Investing in CSMs: a major positive impact on our economy

Taking into account the projects under development and that are at the most advanced stage, it is estimated that new investments of nearly \$8 billion could be made in the medium term, about half of it in mining and the other half in processing the minerals extracted.

The Gouvernement du Québec estimates that the realization of these projects would have a positive impact of \$2.3 billion on Québec's real GDP after one year (in the construction phase) and \$1.3 billion on a recurring basis after three years (in the operational phase). The service, construction, mining and manufacturing sectors would benefit most from these new investments.

The actual scale and pace of the benefits will depend on the progress of the various potential projects, as well as the extent of the processing activities that will be developed in Québec.



ORIENTATION 3.

PLAN AND DEVELOP STRATEGIC LOGISTICS INFRASTRUCTURES AND CORRIDORS

What challenges does it address?

Long distances and the lack or absence of land or sea access infrastructures notably in remote regions and northern territories (e.g. Eeyou Istchee James Bay and Kativik), hamper the competitiveness of mining projects and delay their development. Connecting mining projects to the telecoms network is an additional challenge that limits the scope for using innovative technologies. Finally, energy access remains a strategic consideration for the development of mining projects in Québec, partly due to current grid connection capacities and the availability of electricity across the province. Access to natural gas, needed for certain metal processing operations, also represents a challenge.

Reminder of actions already taken

Action plan - Avantage Saint-Laurent

The 2020-2025 Action Plan of Avantage Saint-Laurent (ASL) was designed with the aim of modernizing port infrastructure, improving economic competitiveness and reducing the environmental impact of maritime activities. It follows on from the first Québec Maritime Strategy (Stratégie maritime du Québec).

Over the 2020-2025 period, the Gouvernement du Québec has undertaken a number of initiatives aimed at implementing, structuring and strengthening the positioning and attractiveness of industrial port (IP) zones, some of which are linked to mining development.

Given the proximity of certain IP zones to mining deposits, and the pivotal role they are called upon to play in the development of CSMs (both logistically and in terms of secondary processing), the development of industrial port zones is of strategic importance for the implementation of the new economic vision of the Gouvernement du Québec and for bringing projects in the CSM sector to fruition.

Financial assistance for infrastructure to support the mining sector

Financing mechanisms for multi-user infrastructures have been developed for specific projects in recent years, notably in the Nordic region.

In addition, SPN has launched the Enveloppe nordique d'infrastructures en appui au secteur minier (ENIAM), which aims to provide financial support for strategic infrastructure projects that include a multi-user perspective, in support of the mining sector and for the benefit of northern communities. ENIAM has a budget envelope of \$20.75 million.

Québec Infrastructure Plan

The Québec Infrastructure Plan (QIP) is a 10-year public infrastructure investment planning tool that ensures that public funds are invested optimally, in line with the priorities and investment limits set by the government.

A number of public investments will benefit the development of the mining sector, including those associated with the development of northern territories and Indigenous communities, and

the road network (\$1.9 billion in the 2025-2030 QIP).

Act to Secure the Responsible Governance of Energy Resources and the Integrated Energy System Planning (Plan de gestion intégrée des ressources énergétiques)

The implementation of the Act to Secure the Responsible Governance of Energy Resources (S.Q. 2025, chapter 24) and of the Integrated Energy System Planning (IESP) will help to plan the energy supply necessary for the development and local processing of CSMs. The IESP will cover all forms of energy, consider energy sobriety and efficiency, and ensure that energy development is consistent with the government's climate and economic objectives. By coordinating energy and mining planning, Québec optimizes infrastructure use, reduces risks for investors and strengthens its position as a reliable and responsible supplier on international markets.

Contribution of federal programs

The Government of Canada has put in place a number of measures related to CSMs, including the creation of the First and Last Mile Fund to support clean energy and transportation infrastructure projects related to the exploitation of CSMs (\$1.5 billion through to 2029-2030). In addition, the aim of the new Trade Diversification Corridors Fund (\$5 billion over seven years) will be to strengthen access to international markets. The Gouvernement du Québec will promote Québec projects and ensure that the federal government takes them into account when developing its financial tools.

What we want to achieve by 2031

Offer high-performance infrastructures tailored to the needs of industry

The availability of transport and telecommunication infrastructures, as well as access to energy, are key factors in the realization of mining and industrial projects. Asset rehabilitation and maintenance projects, such as Route 389, the Route Billy-Diamond and the rehabilitation project for the Grande-Rivière airport, all of which are currently underway, are helping to promote mining development on the Côte-Nord and in the Eeyou Istchee James Bay region. In addition, other projects, such as the upgrading of the Route du Nord, will need to be planned in order to develop or consolidate regional economic corridors. Such projects will provide a logistics solution tailored to the needs of industry and all users.

The Gouvernement du Québec and its other partners are helping to support the development and construction of high-performance infrastructure, and to provide safe transportation for all users. In addition, assessing renewable energy supply solutions for mining companies can help improve their access to energy, with the support of government financial tools.

Develop a vision and an integrated infrastructure development plan for the Labrador Trough and Eeyou Istchee James Bay (EIBJ)

In line with Economic Vision 2025 “*Le pouvoir québécois*”, which expresses the desire of the Gouvernement du Québec to strengthen strategic infrastructures for the benefit of structuring economic development on a national scale, the Strategy proposes to work towards an integrated vision and plan.

Infrastructures that enable materials to be transported from a point of production or extraction to consumer and processing markets, while encouraging the development of secondary and tertiary processing, are strategic.

The Labrador Trough is vital to the economic vitality of the Côte-Nord region, notably because of its large CSM deposits, including high-grade iron. More than 40 exploration projects are active in the area and are faced with high development costs due to the lack of adequate infrastructure. To ensure optimal development, the government is providing \$15 million over two years in the 2025-2026 budget for a feasibility study on the implementation of a rail loop or other rail network optimization scenario (e.g., adding sidings or doubling of existing tracks), which would enable additional volume from other Labrador Trough mines. Among other things, this project would increase current rail capacity at a lower cost. Moreover, the connection of existing rail and port facilities would help diversify Québec exports to markets such as Europe, North Africa and the Middle East.

Secondary processing of iron, rare earths and other CSMs in the industrial port areas of Sept-Îles, Port-Cartier and Baie-Comeau will also play a strategic role in mining projects in the Labrador Trough. In recent years, the Gouvernement du Québec has funded a number of technical studies for the development of these IP zones, where major investments in logistics, industrial, energy and municipal infrastructure are expected over the next decade.

In Sept-Îles, the increase of local transshipment capacities, such as at the SFP Pointe-Noire (SFPPN) company, will be considered as a priority.

SFPPN Horizon 7 project

Objective: maximize iron ore product handling capacity at the Pointe-Noire terminal (SFP Pointe-Noire and Port of Sept-Îles).

Investments estimated at around \$900 million are planned for the installations of the SFP Pointe-Noire (SFPPN) so as to increase its capacity and fully exploit the economic development potential of this strategic infrastructure.

Improving supply logistics chains, notably the rail network between the Côte-Nord and the rest of North America, is essential. Baie-Comeau and Sept-Îles are currently linked to the Canadian National (CN) rail network via Compagnie de gestion de Matane Inc., a CN subsidiary that operates the Georges-Alexandre-Lebel rail ferry.

At Port-Cartier, studies are currently underway to assess the technical and financial feasibility of building a ferry-rail, which would enable goods such as aluminium to be shipped on the South Shore of the St. Lawrence River to the United States or various locations in Canada, as well as other goods to the Côte-Nord region, such as nitrate, industrial equipment for mining companies and transformers (Hydro-Québec [HQ]).

In Baie-Comeau, a working committee made up of MEIE, IQ and the City of Baie-Comeau is developing a financial model to provide the Jean-Noë-Tessier

industrial park with adequate infrastructures to attract secondary processing companies.

Complementary analyses will also be carried out to establish scenarios for supplying natural gas to companies in the Labrador Trough.

Finally, as the Eeyou Istchee James Bay region concentrates the vast majority of Québec's lithium potential and that of other CSMs, particular attention will be paid to developing a concerted vision of logistics infrastructures, including the progressive realization of projects that complement or link up with previously launched initiatives. This vision will take into account transportation links with the regions bordering this territory to the south and east, namely the Abitibi-Témiscamingue and Saguenay-Lac-Saint-Jean regions.

Saguenay Industrial Port Zone (IP)

In recent years, the Gouvernement du Québec has funded a number of technical studies for the development of the Saguenay IP zone and awarded contracts to HQ and Energir to increase the site's energy capacity.

The government has also financed, in equal parts with the federal government, a conveyor project linking the industrial zone to the Marcel-Dionne wharf at the Port of Saguenay. Valued at \$110.4 million, this project is scheduled for commissioning in early 2026.

The Gouvernement du Québec is actively working with its partners (IQ,

HQ, Energir, City of Saguenay, Saguenay Port Authority and the Infrastructure Bank of Canada) to make the Saguenay IP zone investment-ready. This implies that all required infrastructure (municipal infrastructure, electrical reinforcement and natural gas supply) for industrial projects will be completed by the end of 2028.

Bécancour IP zone

The Société du parc industriel et portuaire de Bécancour (SPIPB) has expanded its industrial park and equipped it with industrial infrastructures to attract companies in the battery industry, among others.

Over the next few years, SPIPB plans to expand its port and warehousing capacities, by extending two wharves and building a new one. The cost of the work is estimated at \$339 M will be funded by the Gouvernement du Québec and the Government of Canada.

Improve access to energy

Within the framework provided by the Act to Secure the Responsible Governance of Energy Resources and the Integrated Energy System Planning, a working group will be set up, drawing on the information gathered in the course of support activities for mining and processing projects. Where appropriate, this group will notably encourage developers to choose renewable energy supply solutions. The group will also ensure that the financial tools of the Gouvernement du Québec are in line with the needs associated with evaluating and implementing technological solutions.

Actions that will be carried out

- 11- Develop an integrated vision and plan for infrastructure development:
 - » Assess the feasibility of optimizing rail transport from the Labrador Trough, with a loopback study;
 - » Consolidate regional economic corridors through the progressive realization of infrastructure projects in Eeyou Istchee James Bay;
 - » Integrate the results of the study of the SFP Pointe-Noire (SFPPN) investment project, called Horizon 7, aimed at increasing capacity from 17 to 40 million tonnes, into the future vision.
- 12- Improve access to energy
 - » Evaluate renewable energy supply solutions for mining companies.

Société du Plan nord

The territory north of the 49th parallel covers 72% of Québec's total area and is home to the vast majority of CSM projects.

The mission of **the SPN** is to contribute to the integrated and coherent development of northern Québec, in concert with the representatives of the regions and the First Nations in question, as well as the private sector.

Moreover, it is working to facilitate access to the territory, whether by land, sea or air. Finally, it supports the development of the competencies of the local workforce, including the Indigenous workforce, and contributes to deployment of the winning conditions to allow the populations to inhabit their northern territory fully.

Société de développement de la Baie-James

The mission of the SDBJ is to promote, from a sustainable development perspective, economic development, improvement and exploitation of natural resources, other than hydroelectric resources under Hydro-Québec's mandate, of the James Bay territory. In particular, it can initiate, support and participate in projects aimed at achieving these goals. In addition, it fosters dialogue with other partners in the region. It intervenes in economic development and management of road and airport infrastructures by facilitating business projects in the region and supporting them.



ORIENTATION 4.

ENGAGE PARTNERS

What challenges does it address?

The mineral development process (see Appendix 5), which extends from exploration to operation and reclamation of mine sites over several decades, is a major economic driver for Québec and its regions. However, for this development to truly be of benefit to everyone, it is essential to ensure that the positive spin-offs from mining activities counterbalance the potential repercussions of the projects, so as to promote the well-being of Indigenous and local communities in the territories where they are taking shape.

With this in mind, the government hopes that the QSDCSM will turn the mining sector into a genuine opportunity to create wealth for Indigenous and local communities. It is committed to taking action and implementing levers and support services so that communities can improve their infrastructures, diversify their local economy, stimulate employment and offer new prospects to their population. The mining sector mobilizes numerous stakeholders, each with essential expertise. To ensure the success of the QSDCSM, the government must mobilize these partners to achieve common goals and support the responsible, coherent and efficient

development of the CSM sectors in Québec.

This development can be hampered by a lack of knowledge about several key aspects of their operation. There is inadequate knowledge of the environmental, social and economic effects, which contributes to mistrust and slows project progress. Improving knowledge of the mining ecosystem is also essential. Rapidly changing markets and global value chains make access to comprehensive, up-to-date and reliable economic information essential to effectively guide government decisions and maximize the benefits of public investment. Finally, Québec's influence on the international stage and the active participation of Indigenous and local communities in development require greater mobilization, dialogue, information, awareness-raising and cooperation with a wide range of partners.

Reminder of actions already taken

The Gouvernement du Québec is particularly keen to ensure that Indigenous and local communities benefit directly from the economic and social spin-offs of mining projects carried out within the territory.

- » As part of the work on the Feuille de route 2024-2025: Pour un développement harmonieux de l'activité minière (Roadmap), implementation of concrete measures to maximize the economic benefits of mining projects, including the identification of financial levers for municipalities, regional county municipality (RCMs) and Indigenous communities that are not beneficiaries of northern agreements, as well as a financial support program to help host communities identify business opportunities and develop their expertise.
- » Pilot project to create a maximization committee for Osisko Metals' Gaspé Mine exploration project in Murdochville. This government-backed committee aims to strengthen partnerships between the mining industry and local businesses. It will serve as a model for recommendations applicable to the whole of Québec.
- » Creation of the Table de concertation formation main d'œuvre, in collaboration with the Institut national des mines du Québec (INMQ). This panel brings together the main players in the training and workforce sectors.

Together, they have deployed various initiatives to ensure the availability of a skilled workforce in the mining sector. Through this concerted approach, the government intends to offer local and Indigenous populations concrete employment and business prospects.

- » Reform of the Mining Act and measures launched as part of the Roadmap to modernize practices and ways of doing things in order to better respond to cohabitation issues, notably through support and information and awareness initiatives.

Much of mining activities takes place in the Abitibi-Témiscamingue, Nord-du-Québec and Côte-Nord regions, where First Nations and Inuit are key partners in mining development. For over 20 years, the Cree Mineral Exploration Board of Eeyou Istchee James Bay and the Nunavik Mineral Exploration Fund, two Indigenous organizations supported by the Gouvernement du Québec, the Cree Nation Government, the Kativik Regional Government and the Makivik Corporation, have been encouraging Cree, Inuit and Naskapi participation in mining development, and fostering dialogue between the communities and Indigenous organizations and proponents.

Société du Plan Nord financial assistance programs

The SPN offers several financial tools, which contribute to the integrated and coherent development of Québec's northern territory, and has an envelope of \$92.3 million for the 2023-2028 period. These financial tools support a wide variety of projects in communities north of the 49th parallel. These projects focus on entrepreneurship, workforce training, food safety, the environment and land conservation.

environmental and social consequences associated with these projects. Better equipped communities are also able to participate more actively and meaningfully in mine development.

Indeed, a lack of understanding of the mining sector, its development process, its practices, the standards that govern it and its role in society is often an obstacle to the social acceptability of projects in many settings. As key players in mining development, Indigenous and local communities must be able to count on government support to help them understand the issues at stake, with access to information, expertise and appropriate support, so they can exercise their roles and participate in an informed way in discussions and decision-making processes.

Strengthening the active involvement of these communities is a key lever for ensuring responsible mining development tailored to local realities. Their proximity to the area and their in-depth knowledge of local realities enable them to guide project development in a way that is consistent with their priorities, and to foster a more constructive dialogue between developers, communities and government bodies. This increased involvement also helps to build trust and create lasting partnerships.

In so doing, the government intends to ensure that Indigenous and local communities can fully benefit from the spin-offs of the mining sector, while maintaining a quality living environment and consolidating their long-term prosperity.

What we want to achieve by 2031

Strengthen the ability of host communities to participate in the development of mining activities

It is essential for the government to support local and Indigenous communities, since they are the ones directly affected by the development of mining sectors. The aim of this support is to build their capacities so that they can proactively plan their development, seize the economic opportunities generated by the mining sector and mitigate the

Strengthening community support, including information and awareness-raising

A range of adapted tools and support services should enable Indigenous and local communities to better understand and analyze mining projects and better plan how to benefit from them. In addition, developing their skills and supporting local entrepreneurship encourage the hiring of workers from host communities and contribute to the development of regional businesses, while supporting economic diversification.

Specialized support adapted to host communities will continue, notably through the development of support for the establishment of maximization committees, as well as the maintenance and reinforcement of support offered to Indigenous communities through the renewal of liaison officer positions at the First Nations of Québec and Labrador Sustainable Development Institute and the First Nations of Québec and Labrador Economic Development Corporation. The creation and dissemination of digital tools and information material on Québec.ca will also be an extension of the support offered to communities.

When communities are informed and supported from the earliest stages of projects, including the exploration phase, they are better able to anticipate needs, plan their development and structure themselves to accommodate mining projects. This approach maximizes the benefits of the mining sector, supports the dynamism and prosperity of host communities even after mining operations have ceased, and preserves

a quality living environment for future generations.

Financial support to better seize business opportunities and prepare to accommodate mining activities

When planned, new dynamics can become levers for local and regional development, generating substantial business opportunities. The government plans to provide financial support to municipal and economic players, as well as local and Indigenous community suppliers, who host or plan to host mining projects, notably by offering financial assistance to anticipate and prepare for the potential transformations that these projects may bring to living environments.

Adequate and anticipated development of municipal infrastructures is essential to supporting economic growth and meeting the needs of communities hosting mining development projects. Municipalities need to be able to plan and adapt their road networks, water and sewer systems and other community infrastructures, such as daycare services or early childhood centres, to the new economic realities and labour requirements generated by these projects.

By promoting better coordination between the players involved, and providing municipalities with the resources and expertise that they need to draw up realistic, integrated plans, it becomes possible to target investments where they will have the greatest impact. This approach helps to accelerate local and regional economic development,

while ensuring that communities have sustainable, safe infrastructure capable of supporting their long-term prosperity.

Other planned funding includes support for the continued implementation of the Podium Mines program to develop the competitiveness of mining sector suppliers and subcontractors.

There are also plans to set up a program to support the participation of Indigenous communities in the development of mineral resources. Financial support is also provided for the implementation of agreements on the inspection and control of certain mining activities, to be negotiated with Indigenous communities.

Environmental liabilities and the local economy

The direct involvement of Indigenous communities in reducing environmental liabilities not only contributes to their knowledge and expertise but also encourages them to take ownership of the economic spin-offs generated by these projects. This approach serves to reduce environmental impacts inherited from the past, while creating new prospects for sustainable economic development and consolidating partnerships between Indigenous and government players.

Actions that will be carried out

- 13- Equip the communities hosting mining projects with:
 - » the implementation of measures to better seize the business opportunities offered by the mining sector and to prepare for the arrival of mining activities;
 - » increased support for communities, notably by offering an online version, including information and awareness-raising.

- 14- Put the reduction of environmental liabilities to work for the local economy through:
 - » An initiative that aims to reduce environmental liabilities arising from the mining sector in collaboration with Indigenous communities.

Address the workforce issue

By promoting the training, attraction and retention of talent, the government intends to support the sector's competitiveness, while offering quality employment opportunities that contribute to the vitality of Indigenous and local communities and reduce regional disparities.

Actions that will be carried out

- 15- Strengthen the availability of a skilled workforce in the CSM sector:
 - » by providing financial support for initiatives to be implemented by the Table de concertation formation main-d'œuvre.

Improve knowledge of the mining ecosystem

The lack of knowledge about certain aspects of CSM operations is slowing down the development of projects and value chains. Many of the effects of mining activities surrounding CSMs are still poorly understood, which may contribute to mistrust of the latter and slow project development. To overcome these shortcomings, it is essential to gain a better understanding of these effects, which affect environmental, social and economic aspects alike.

On the other hand, global CSM markets and value chains are evolving rapidly, and accurate, up-to-date information remains essential to guide government action and ensure that the benefits of public funds invested in CSMs are maximized.

Actions that will be carried out

- 16- Study the environmental, social and economic effects of developing CSM projects through:
 - » support for research;
 - » completion of a comparative study to assess the carbon footprint of various CSM sectors.
- 17- Analyze the market trends of the CSMs sectors, through:
 - » completion of market studies.

Strengthen foreign partnerships

Québec has an open economy, and the CSM sector is no exception. CSM value chains are globalized and are developing in response to complex economic and geopolitical challenges.

To leverage its competitive edge and ensure the optimal development of its own value chains, Québec needs to strengthen its partnerships with various foreign players, both public and private. These partnerships can help attract both new capital and new technologies that are essential to the development of

CSMs, as well as the export of Québec's CSMs, ideally processed in Québec, while helping to secure global supply chains.

In addition, Québec must participate in various forums and discussions or be active within various institutions to assert its interests and ensure that its vision is taken into account in the development of international initiatives or standards relating to CSMs. To achieve this, Québec can notably rely on its network of foreign representations, its expertise and the networks of influence that it has built up over the years.

International partnerships

In a context in which several economic and strategic sectors, such as renewable energies, energy storage, the medical sector, transport electrification, aviation, telecommunications and the defence sector depend on the supply of CSMs, the latter have become an issue of economic and even national security. Several governments are involved in the business environment and financing of mining and processing projects. Québec must make itself known to these potential foreign partners through "mineral diplomacy" actions supported by the MRNF, MRIF and IQ, notably with the support of Québec delegations abroad. With the signing of declarations of cooperation with France, the Netherlands and the United Kingdom, Québec will pursue its development efforts with the governments of European countries, Australia, Japan and South Korea, while maintaining its relations with the United States.

In this way, Québec's mineral diplomacy will highlight the province's strategic advantages in terms of global integration into industrial, technological and R&D

ecosystems, as well as high value-added innovation for CSMs. Drawing on its network of 34 representations in 19 countries, Québec will take targeted action with allies to advance its interests in international trade and foreign investment prospecting.

The Québec delegations will be on the lookout for policies, positions and strategies in their countries of action, in order to identify potential restrictions, both political and commercial, as well as business opportunities that could benefit Québec companies.

In recent years, the network of foreign representations of the Gouvernement du Québec has leveraged its strengths to make Québec a partner of choice by concluding collaborative agreements in Europe and continuing to develop relations in the Indo-Pacific region and with the United States. These collaboration agreements form the basis for concrete, forward-looking discussions and exchanges between the signatories, with a view to the beneficial integration of CSM value chains between stakeholders.

Multilateral organizations

The Canadian government is a member of several multilateral bodies, such as the G7, the Organization for Economic Co-operation and Development (OECD) and the International Energy Agency (IEA), and participates in their work on governance, cooperation and securing critical and strategic minerals. The Gouvernement du Québec is already closely following the work of some of these organizations.

Given that natural resource management falls within its jurisdiction, Québec intends to assess the most appropriate means of asserting its interests in these forums, or, where possible, developing new collaborations.

Similarly, Québec will play an active role in the development of international standards, whether those of the International Organization for Standardization (ISO) or other standards organizations, ensuring that Québec's interests and specific features are taken into account.

Actions that will be carried out

- 18- Develop strategic international partnerships by participating in influential diplomatic activities:
 - » within territories deemed to be a priority;
 - » in multilateral institutions.





GOVERNANCE

The Strategy's implementation is based on an agile governance model that enables its key players to evolve within a flexible structure that fosters the exchange of information between the various departments and agencies (MO) directly concerned, both to monitor the plan's implementation and to ensure, on an ongoing basis, its alignment with the government plans and programs of these MOs.

The Strategic Committee, made up of associate deputy ministers, plays a decision-making role in line with the political and strategic orientations specific to the respective missions of the departments that they represent. These associate deputy ministers are responsible for circulating the orientations adopted by the committee to the managers of their organizations, and for supporting the steering committee in implementing actions related to the Strategy.

The steering committee organizes the work of the teams that will implement the actions. Interdepartmental in nature, it is responsible for the Strategy's accountability, and it pools the expertise of its members to ensure that the Strategy's actions are carried out. It can also, if necessary, set up working groups of professionals to support the implementation of actions.

ACTION PLAN

What we want to achieve

Orientation 1. Improve the business environment and accelerate projects

1.1.1.1 Reduce the administrative burden associated with mining projects

Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
MELCCFP, MRNF	1. Facilitate the issuance of rights, permits and authorizations, notably through: <ul style="list-style-type: none">- acceleration of the work on regulatory and administrative streamlining;- the development of a service offer to facilitate the steps taken by proponents.	The number of measures implemented to accelerate work on regulatory and administrative streamlining.

Orientation 2. Develop the entire CSM value chain

2.1 Encourage mining exploration

Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
MRNF	<p>2. Promote the discovery of new CSM deposits, through:</p> <ul style="list-style-type: none"> - completion of surveys in order to acquire geoscientific knowledge; - integration of artificial intelligence to enhance mining potential. <p>3. Accelerate the completion of preliminary economic assessments by supporting the completion of geometallurgical and geo-environmental studies by the CSM Exploration Support Program.</p>	<p>The number of new mining projects reaching the development phase.</p> <p>Number of exploration projects receiving financial support.</p>

2.2 Stimulate mining and development

Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
MRNF	4. Support the development of projects related to mining development.	<p>The number of CSM-related mining projects at the development and production stages that benefit from the implemented programs; and</p> <p>The amount invested in the construction of mines and their processing plants.</p>
MEIE, MRNF	5. Stimulate the digital transformation of mines.	
IQ, MRIF, MRNF	<p>6. Promote business opportunities to foreign investors, through:</p> <ul style="list-style-type: none"> - participation in international and national activities; - the organization of trade missions. 	

2.3 Take advantage of processing

Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
MEIE, MRNF, IQ	<p>7. Establish or develop local processing activities to promote the consolidation of value chains by profiling the environment that supports processing in Québec through:</p> <ul style="list-style-type: none"> - the adequacy of financial tools with the needs of the sectors; - the continuation of the work of the interministerial working group on trade in CSMs; - the start of discussions on partnerships with foreign funds. 	The amount invested in the construction of mines and their processing plants.
MRNF, MEIE	<p>8. Support the implementation of CSM traceability in companies, for the benefit of market development, through a financial assistance program.</p>	The number of projects at the CSM development and mining stage that benefit from the implemented programs.

2.4 Structure CSM value chains around circular economy and recycling strategies

Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
MRNF	<p>9. Implement all elements of the value chain related to the recovery of tailings, notably through:</p> <ul style="list-style-type: none"> - continuation of the work of the knowledge acquisition approach on tailings ponds; - support for the acquisition of knowledge in asbestos management. 	The number of subsidized circular economy projects involving CSMs.
MRNF, MEIE, MELCCFP, Recyc-QC	<p>10. Integrate the circular economy into the CSM value chains, through:</p> <ul style="list-style-type: none"> - completion of an assessment on the circularity of the Québec mining sector; - the provision of support for the revision of opportunity studies, in order to make the most of the data collected in the course of these studies; - the development of a service offering from the network of agents on industrial synergies for the mining sector. 	

Orientation 3. Plan and develop strategic logistics infrastructures and corridors

3.1 Support the development and implementation of high-performance infrastructures tailored to the needs of industry

Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
MEIE, SPN, MRNF, MTMD	11. Develop an integrated vision and plan for infrastructure development: <ul style="list-style-type: none"> - Assess the feasibility of optimizing rail transport from the Labrador Trough, with a loopback study; - Consolidate regional economic corridors through the progressive realization of infrastructure projects in Eeyou Istchee James Bay; - Integrate the results of the study of the SFP Pointe-Noire (SFPPN) investment project, called Horizon 7, aimed at increasing capacity from 17 to 40 million tonnes, into the future vision. 	CSM mining projects that have reached the development phase have an identified and assessed energy supply and infrastructure solution.
MEIE, HQ, MRNF	12. Improve access to energy by evaluating renewable energy supply solutions for mining companies.	

Orientation 4. Engage partners

4.1 Strengthen the ability of host communities to participate in the development of mining activities

Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
MRNF, MAMH, SPN, MEIE, SRPNI	13. Equip the communities hosting mining projects with: <ul style="list-style-type: none"> - the implementation of financial assistance programs to better seize the business opportunities offered by the mining sector and to prepare for the arrival of mining activities; - increased support for communities, notably by offering an online version, including information and awareness-raising. 	The number of Indigenous communities and administrative regions that have benefited from the tools implemented to help them understand the mining market and maximize local economic benefits.
MRNF	14. Put the reduction of environmental liabilities to work for the local economy through: <ul style="list-style-type: none"> - an initiative that aims to reduce environmental liabilities arising from the mining sector in collaboration with Indigenous communities. 	The number of measures taken to inform the mining ecosystem as well as Indigenous and local communities.

4.2 Address the workforce issue

Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
INMQ, MRNF, CSMO- Mines, MEQ, MES, MESS, SPN	15. Strengthen the availability of a skilled workforce in the CSM sector, by providing financial support for initiatives to be implemented by the Table de concertation formation main-d'œuvre.	The number of actions implemented as a result of the Table de concertation formation main-d'œuvre.

4.3 Improve knowledge of the mining ecosystem

Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
MRNF, MSSS MELCCFP	16. Study the environmental, social and economic effects of developing CSM projects through: <ul style="list-style-type: none"> - support for research; - completion of a comparative study to assess the carbon footprint of various CSM sectors. 	The number of studies, research or analyses that have been produced and transmitted to the mining ecosystem, notably through the online support offer.
MEIE, MRNF, SPN	17. Analyze the market trends of the CSM sectors through the preparation of market studies.	

4.4 Strengthen foreign partnerships

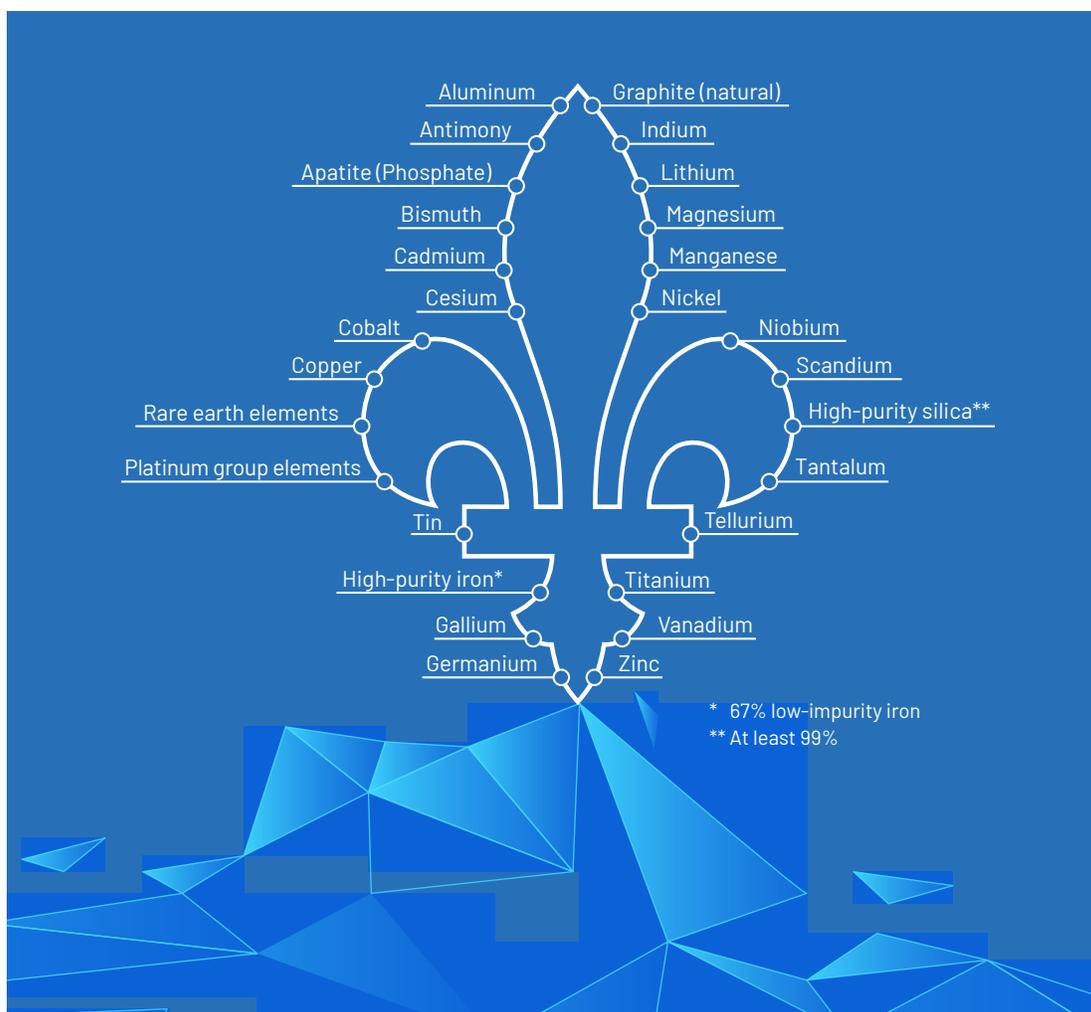
Responsible party(ies) Collaborators	Actions that will be taken to achieve our objectives	What will prove our success?
MRIF, MRNF	18. Develop strategic international partnerships by participating in influential diplomatic activities: <ul style="list-style-type: none"> - within territories deemed to be a priority; - in international multilateral institutions. 	The number of foreign institutional funds that have participated financially in CSM projects in Québec.

APPENDICES

APPENDIX 1 – LIST OF QUÉBEC’S CRITICAL AND STRATEGIC MINERALS

Critical and strategic minerals recognized by the Gouvernement du Québec

CSMs are defined by the Gouvernement du Québec as minerals that are essential to critical sectors of the economy, and the supply of which is deemed to be uncertain or vulnerable (critical minerals) or necessary for the implementation of its policies (strategic minerals). The government recognizes 28 CSMs, the development of which will be supported by the QSDCSM:



APPENDIX 2 – QPDCSM 2020-2025

On October 29, 2020, the Gouvernement du Québec announced the QPDCSM 2020-2025. The aim of this government plan was for Québec to be recognized as a reliable, ethical and sustainable partner, while contributing actively to global green-energy and technological transitions and to wealth creation in a greener economy. It was developed after targeted consultations and an online public consultation held from November 19, 2019, to February 7, 2020, in a context in which:

- » new technologies in the fields of aviation, telecommunications, renewable energies, energy storage and transport electrification were emerging and beginning to drive demand for CSMs;
- » the strong demand for resources increasingly influenced political relations between different states. Some countries, such as the United States, were already seeking to diversify their supplies from their allies in order to reduce their dependence on other foreign suppliers;
- » Québec could define itself as a producer capable of supplying such resources as lithium, graphite, nickel and titanium;
- » the development of CSMs was in line with the needs associated with the implementation of the energy transition and the production of clean energy for transport electrification. This development was therefore part of a green economy perspective, including circular economy and recycling strategies. In addition, it was necessary for the implementation of several government strategies, including the Québec Battery Industry Development Strategy (Stratégie québécoise de la filière batterie), the Plan for a Green Economy 2030 (Plan pour une économie verte 2030), the Government Sustainable Development Strategy (Stratégie gouvernementale de développement durable), the Sustainable Mobility Policy (Politique de mobilité durable) 2030 and the Québec Strategy to Support Research and Investment in Innovation (Stratégie québécoise de recherche et d'investissements en innovation) 2022-2027.

The QPDCSM 2020-2025 was initially allocated a budget of \$90 million, which was increased by \$18 million in subsequent budget plans.

Its vision was to make Québec a leader in the production, processing and recycling of critical and strategic minerals in partnership with the regional and Indigenous communities, which revolved around four orientations:

- 1- Increase knowledge and expertise on CSMs;
- 2- Deploy or optimize integrated sectors in partnership with the producing regions;

- 3- Contribute to the transition to a sustainable economy;
- 4- Raise awareness, guide and promote.

The QPDCSM 2020–2025 set out a roadmap for achieving the government’s ambitions, with the aim of developing promising CSM sectors for the Québec economy. Coordinated by the MRNF, it involved several departments and agencies, including MELCCFP, MEIE, SPN, IQ and its subsidiary SOQUEM, the Ministère des Relations internationales et de la Francophonie and the Ministère de la Santé et des Services sociaux.

Observed effects of implementing the QPDCSM 2020–2025

After five years of implementation, the QPDCSM has demonstrated its effectiveness by laying the foundations for a business environment conducive to the growth of this sector and its related industries. Despite a global context marked by market uncertainty, Québec has seen a marked increase in mining activity, notably driven by a significant influx of capital and the participation of major new players in the field of mineral exploration.

In summary, the QPDCSM 2020–2025 has made it possible to:

- » support the development of CSMs in Québec:
 - Québec is North America’s only scandium producer;
 - It is also the largest producer of lithium, in the form of spodumene concentrate, in North America;
- » develop Canada’s largest potential in terms of CSMs:
 - Québec’s subsoil holds a large proportion of Canada’s critical and strategic mineral reserves. Moreover, Québec is home to North America’s only operating graphite mine, as well as Canada’s largest lithium mine;
- » increase mining investment in CSMs:
 - 274% increase in exploration and development spending from 2019 to 2024;
 - \$1.7 billion invested in exploration and development over the same period;
 - In 2022, Québec was the number one destination for mining investment in Canada;

- » advance CSM mining projects in Québec:
 - 30 separate CSM projects have advanced at least one step in the mineral development process (see Appendix 5) since 2020;
 - 33 of the 50 (66%) advanced mining projects in July 2025 are CSM projects, while the ratio was 15 out of 30 (50%) in 2020;

- » support research and development (R&D) and innovation projects in the CSM sectors:
 - \$51.8 million were invested in R&D through programs and support measures under the responsibility of the MRNF;
 - 6 programs have been set up to fund CSM projects;
 - More than a dozen tailings recovery and recycling initiatives have been launched in the CSM industry.

Thanks to its vast mineral potential and priorities well established in its government policies, Québec already has a track record that attracts large-scale proponents. The Bécancour area, between Montréal and Québec, is home to Québec's third-largest innovation zone, the Vallée de la Transition Énergétique, and is well on the way to becoming a high-calibre "CSM development valley", with battery industry plants under construction.

APPENDIX 3 – DISCUSSION WORKSHOPS

To inform the development of the QSDCSM, in addition to meetings organized with government partners, the MRNF organized a series of discussion workshops with stakeholders in the development of the mining sector and value chains. These discussion workshops were a continuation of the efforts made over the past five years to guide Québec’s mining development in a responsible and concerted manner.

In the spring of 2023, during the implementation of the QPDCSM, the MRNF launched a participatory process for the harmonious development of mining activities, which enabled it to obtain views from citizens, Indigenous communities, elected officials and industry players in order to better understand their concerns and expectations. This consultation highlighted the importance of striking a balance between economic benefits, environmental protection and social acceptability. As a result, amendments have been made to the Mining Act, and the [Feuille de route pour un développement harmonieux et responsable de l’activité minière 2024-2025](#) (Roadmap) has been implemented to give concrete form to many of the recommendations arising from this consultation, targeting specific measures to improve transparency, predictability and community involvement in project planning.

The discussion workshops held in the spring of 2025 provided an opportunity to take stock of the actions taken and progress made under the QPDCSM and the Roadmap, but they also revealed that, despite the progress made, certain issues remain and require renewed and shared action between the Gouvernement du Québec, the industry and all mining development stakeholders. The discussion workshops validated stakeholders’ current and emerging needs, and gathered their concerns, suggestions and ideas for action.

APPENDIX 4 –

CONSISTENCY AND COMPLEMENTARITY WITH QUÉBEC PUBLIC POLICIES IN FORCE

The QSDCSM is in line with, and complementary to, several strategies of the Gouvernement du Québec. It ensures that the development of Québec’s mining sector is aligned with the economic, environmental and social targets set out in government policies and plans to boost the province’s economy. Governmental coherence is crucial to the success of the Strategy, since it ensures that the entire mining ecosystem can benefit from measures tailored to its realities.

Québec’s Economic Vision (MCE)

The 2025 Economic Vision, “*Le pouvoir québécois*”, sets out four key economic priorities in response to a global context marked by geopolitical, economic and technological upheaval. One of these priorities is to seize new opportunities so that the entire Québec economy emerges stronger in the long term. Given the current economic situation, the major trends that are taking shape and Québec’s strengths, critical and strategic minerals have been identified as one of two major strategic opportunities to serve as a locomotive for the entire Québec economy, through the implementation of value chains. The QSDCSM is part of this process, helping to make this strategic opportunity a reality.

Québec Battery Industry Development Strategy (MEIE) (Stratégie québécoise de la filière batterie)

The Strategy supports the implementation of the Québec Battery Industry Development Strategy by promoting stable and predictable access to the minerals required to develop a complete and competitive value chain, from below the ground to battery recycling.

Avantage Saint-Laurent - Québec’s Maritime Vision (2020-2025 Action Plan) (MTMD)

The goal of the Avantage Saint-Laurent Action Plan is to make the St. Lawrence a high-performance economic corridor, while respecting the ecosystems affected and the interests of the maritime communities along the river. Québec’s new maritime vision is based on three main orientations: 1) provide the St. Lawrence with modern, competitive port infrastructure; 2) ensure efficient, ecosystem-friendly navigation on the St. Lawrence; 3) offer maritime communities promising and sustainable development opportunities.

Québec Strategy to Support Research and Investment in Innovation (MEIE)

The aim of the Québec Strategy to Support Research and Investment in Innovation (SQRI2) is to make Québec companies even more productive, and to generate even more positive social and environmental spin-offs. To this end, its aim is to accelerate the transition from innovative idea to market. All innovation cycles are affected, including the cross-sector collaboration needed to accelerate them. Several players in Québec's innovation sector are involved in the actions developed between 2020 and 2025 under the QPDCSM, and which will continue under the QSDCSM.

Innovation zones (MEIE)

World-class innovation zones have been created to increase the marketing of innovations, exports, local and foreign investment and business productivity. Their aim is to attract talent, entrepreneurs, prime contractors and researchers from Québec and beyond to specific areas.

Critical and strategic minerals are an integral part of the technologies targeted in the four designated innovation zones: DistriQ (Quantum), Vallée de la Transition Énergétique, Technum (semiconductors) and Espace Aéro.

Québec Green Hydrogen and Bioenergy Strategy (Stratégie québécoise sur l'hydrogène vert et les bioénergies) (MEIE)

The Québec Green Hydrogen and Bioenergy Strategy has the purpose of creating a coherent framework and a favourable environment that will serve to accelerate the production, distribution and use of green hydrogen and bioenergy. The development of these energy sources and their by-products (e.g., green steel) supports the decarbonization of the mining industry.

Public Land Development Plan (Plan de mise en valeur du territoire public) (MRNF)

The Public Land Development Plan 2022-2026 is articulated around four main lines: an accessible territory, economic vitality, an approach concerned with the environment and renewed governance.

Government Sustainable Development Strategy (MELCCFP)

The strategy is closely aligned with Québec's major sustainable development orientations, as set out in the Government Sustainable Development Strategy 2023-2028. By supporting initiatives in the circular economy, research and development, local processing, the implementation of best practices in social acceptability, and community participation in the development of mining projects, it contributes to the vitality of regional communities and to making Québec a

centre of innovation and excellence in the green economy.

Circular Economy Roadmap (MELCCFP) (Feuille de route en économie circulaire)

The Strategy aims to make responsible mining the norm, by focusing on optimizing operations and tailings reclamation to stimulate innovation. It also intends to make better use of the resources already available, by recycling components containing CSMs and utilizing above-ground deposits. Finally, it aims to integrate circularity, from the opening to the closing of sites, so as to limit losses and maximize the use of infrastructure.

2030 Plan for a Green Economy (MELCCFP)

The Strategy is also in line with the targets of the 2030 Plan for a Green Economy, providing supply chains with the minerals essential to the energy transition and integrating low-carbon operating practices. It contributes to strengthening the alignment between economic development and climate action.

Northern Action Plan (SPN)

The Northern Action Plan 2023–2028 represents more than \$2.56 billion in investments between now and March 31, 2028, which will support communities in attracting a variety of players to invest, stay and live there, and in implementing innovative models that reconcile the economic and social benefits of development

with the conservation of the northern environment.

Government Strategy to Ensure the Occupation and Vitality of Territories (Stratégie gouvernementale pour assurer l'occupation et la vitalité des territoires) (MAMH)

The Government Strategy to Ensure the Occupation and Vitality of Territories 2025–2029 is based on the development of each territory's potential, in a perspective of sustainable development, resulting from the commitment and dynamism of citizens, elected officials and socio-economic players. The development of CSMs represents an important lever for diversifying the regional economy, stimulating employment and strengthening the sustainable settlement of local populations.

2030 Nature Plan (MELCCFP)

Both the Nature Plan 2030 and the Strategy are part of a government vision that notably aims to reconcile economic development with biodiversity conservation. The Strategy recognizes that the exploration and exploitation of CSMs must be carried out with respect for the natural environment, including through the implementation of mitigation, restoration and compensation measures. The MRNF is also a member of the steering committee on biological diversity set up by the MELCCFP to ensure that biodiversity is taken into account and integrated into all areas of government activity.

Departmental Strategy for Labour Market Integration of First Nations and Inuit People (Stratégie ministérielle d’insertion socioprofessionnelle des Premières Nations et des Inuit) and its action plan (MESS)

The Ministerial Strategy for Labour Market Insertion and its 2025-2029 Action Plan revolve around two main orientations, which aim to increase the participation of First Nations and Inuit members in public employment services, and to promote the hiring and retention of these same members. This strategy is designed to enable Indigenous communities to take full advantage of economic opportunities, notably those associated with the development of projects involving critical and strategic minerals.

For its part, the Commission des partenaires du marché du travail offers a number of funding programs designed to support workforce training projects, notably through collective developers such as the sector-based workforce committees in the mining and metallurgy industries.

APPENDIX 5 – MINERAL DEVELOPMENT PROCESS

	Step	Objectives	Methods	Target outcomes at the end of the step	Mineral inventory	
Mineral development process	1 Geoscientific surveys	Identify mineral potential on Québec's territory	Data acquisition surveys, sampling, research and synthesis of acquired data	Publication of geological information and areas suitable for mineral exploration	Mineral potential	
	2 Exploration	Basic exploration: discovery and identification of mineral occurrence and confirmation of mineral content and continuity Advanced exploration: completion of an initial inventory of the mineral deposit and assessment of its preliminary economic potential	Review and synthesis of available information Prospecting, mapping, surveying, stripping and drilling Sampling at the surface, in trenches and in drill holes Resource estimates Laboratory-scale mineralogical and metallurgical tests Technico-economic analysis of exploration data	Preliminary economic assessment or pre-feasibility study Decision to develop the deposit		
	3 Deposit appraisal	Appraisal of the deposit and definition of the parameters for the mine project	Delimitation of the deposit: drilling Selection of the processing method: bulk sampling, pilot-scale mineralurgical and metallurgical testing Engineering and cost estimating, market study Socioeconomic analysis of confirmed data Analysis of environmental, social, political and financial risks	Feasibility study and decision to start production of a mine Obtaining financing	Mineral resources	
	4 Construction and running-in	Mine site construction Commissioning and running-in	Project management and quality management Commissioning plan and personnel training	Achievement of commercial mining		
	Mining development process	5 Extraction	Ore extraction and processing Marketing of the product	Production management for continuous improvement of quality, yield and employee safety	Return on investment and earnings Full operation of the deposit	Mineral reserves
		6 Reclamation	Closure, securing and reclamation of the mine site Carry out the post-reclamation follow-up	Management of mine site closure and reclamation to a satisfactory state	Reclaimed mine site meeting Québec's mine site reclamation requirements	

Good practices of the proponent

As early as possible in the process, the proponent should inform and consult the public, the municipalities and the Indigenous communities concerned about the progress of the work and the project to ensure their better integration with the host community and improve the project's social acceptability.

Deploy responsible practices that account for the social, environmental, economic and governance issues.

The proponent's legal obligations

- » Obtain the necessary permits and authorizations for every activity that has an impact on the environment or territory
- » Conduct the provincial and federal environmental assessment process, as the case may be.

Overview of obligations to fulfill

- » Acquire claims and notify the landowner and the municipality
- » Obtain approval of rehabilitation and restoration plan and deposit financial guarantee
- » Obtain the mining lease
- » Establish a follow-up committee
- » Carry out environmental monitoring actions
- » Carry out the work included in the Mine Site Rehabilitation and Restoration Plan (Plan de réaménagement et de restauration du site minier)

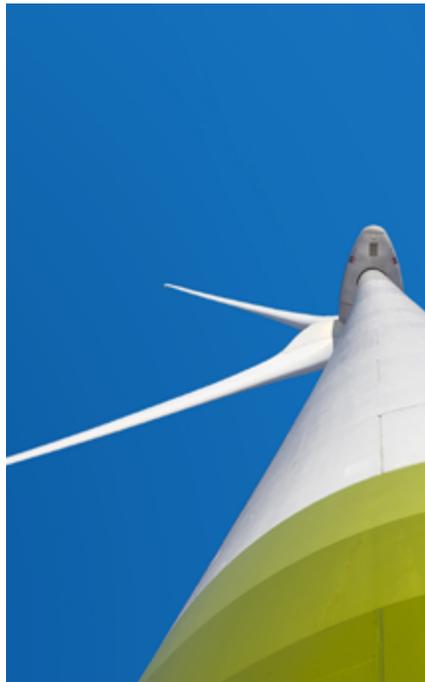
The State's obligation

The Government must meet its constitutional obligations with respect to consultation with the Indigenous peoples and, if necessary, accommodation.

This appendix has no legal standing.

8 October 2020 - Direction générale du développement de l'industrie minière





*Ressources naturelles
et Forêts*

Québec 