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KABIL — India's Critical Minerals Mission: Lithium, Cobalt and the EV Supply Chain

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ECONOMY**SCIENCE & TECH**

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WHY IN NEWS

Khanij Bidesh India Limited (KABIL) — India's government-owned joint venture tasked with acquiring critical mineral assets overseas — is expanding its lithium and cobalt exploration in Argentina, Australia, and the Democratic Republic of Congo. KABIL's activities are central to India's ambitions in electric vehicles, battery storage, and electronics manufacturing under the PLI scheme.

India's rapid ramp-up of renewable energy (283 GW and rising) and its EV production targets have created an urgent strategic challenge: the raw materials required for lithium-ion batteries — lithium, cobalt, nickel, and graphite — are not available in India in sufficient quantities. KABIL is India's primary instrument for securing these materials internationally, modelled on China's earlier critical minerals acquisition strategy.

WHAT IS KABIL?

PARAMETER	DETAIL
Full name	Khanij Bidesh India Limited
Type	Central Public Sector Enterprise (CPSE) — Joint Venture
Partners	NALCO (40%) + HCL (30%) + MECL (30%)
Ministry	Ministry of Mines , Government of India
Incorporated	August 8, 2019
Mandate	Identify, acquire, develop, and process strategic mineral assets overseas

Partner Organisations

- **NALCO** — National Aluminium Company Limited (Ministry of Mines)
- **HCL** — Hindustan Copper Limited (Ministry of Mines)
- **MECL** — Mineral Exploration and Consultancy Limited (Ministry of Mines)

All three are PSUs under the Ministry of Mines, making KABIL entirely within the Mines Ministry’s portfolio.

WHY CRITICAL MINERALS MATTER

India’s Mineral Import Dependence

India currently imports nearly all of the critical minerals required for its clean energy and electronics transition:

MINERAL	PRIMARY USE	INDIA’S DEPENDENCE
Lithium	Li-ion batteries (EV, grid storage)	~100% import dependent
Cobalt	Battery cathodes; superalloys	~100% import dependent
Nickel	Battery cathodes (NMC chemistry); stainless steel	High dependence
Graphite	Battery anodes	Significant import dependence
Rare Earth Elements (REE)	Permanent magnets for EV motors, wind turbines	Moderate dependence

China controls an outsized share of global critical mineral mining, processing, and refining — creating strategic supply chain risks for countries transitioning to clean energy without secured mineral supply chains.

India’s Energy Transition Demand

- India’s target of **500 GW renewable energy by 2030** requires large-scale battery storage systems
- **10 million EVs by 2030** under FAME and state EV policies will require substantial lithium and cobalt imports
- Electronics manufacturing under PLI needs REE-based components

KABIL’S GLOBAL OPERATIONS

Argentina — Lithium (Puna Region)

- Signed a Memorandum of Understanding with Argentina’s CAMYEN (provincial mining company) for lithium block exploration in the **Catamarca province**, Puna plateau
- Argentina is part of the “Lithium Triangle” (Argentina, Bolivia, Chile) — which holds ~60% of the world’s known lithium reserves

Australia — Critical Minerals

- MoU with the Government of Australia (2020) for cooperation on critical minerals
- Australia is a major source for lithium (hard rock spodumene), cobalt, and REEs

DRC — Cobalt

- DRC holds ~70% of world’s cobalt reserves
- KABIL is exploring entry points — though DRC’s political instability creates significant risk

INDIA’S BROADER CRITICAL MINERALS POLICY

INITIATIVE	DETAIL
Critical Minerals List (2023)	India identified 30 critical minerals; updated to include REEs, lithium, cobalt, titanium
MMDR Amendment (2023)	Atomic minerals (lithium blocks) opened for private sector auction
KABIL overseas acquisitions	Govt-to-Govt mineral sourcing arrangements
Bilateral mineral deals	With Australia, Argentina, Canada, Mozambique
Critical Mineral Mission	Launched 2024 — dedicated funding and inter-ministerial coordination

COMPARISON WITH CHINA’S MODEL

China began its overseas critical mineral acquisition strategy in the early 2000s — securing stakes in DRC cobalt mines, Chilean lithium operations, and Australian REE projects. India is roughly 15–20 years behind this curve. KABIL is the institutional vehicle to close this gap, but India must avoid the diplomatic controversies that China’s mineral acquisitions generated in Africa.

UPSC RELEVANCE

PAPER	ANGLE
GS3 — Economy	EV supply chain; import dependence; PLI scheme; mining policy
GS3 — Science & Tech	Battery chemistry; critical minerals in clean energy
GS2 — IR	Mineral diplomacy; India-Australia-Argentina bilateral relations
Mains Keywords	Critical Minerals Mission, Lithium Triangle, MMDR Act, PLI scheme, FAME, battery storage, supply chain security

Khanij Bidesh India Limited | JV: **NALCO (40%) + HCL (30%) + MECL (30%)** | Ministry: **Ministry of Mines** | Incorporated: **August 8, 2019** | Target minerals: *Lithium, Cobalt, Nickel, Graphite, REEs* | Operations: *Argentina (Lithium Triangle), Australia, DRC* | “Lithium Triangle”: *Argentina + Bolivia + Chile ≈ 60% global lithium reserves* | *DRC: ~70% world cobalt* | *India’s Critical Minerals List (2023): 30 minerals* | *MMDR Amendment (2023): lithium blocks opened to private sector* | *GS3: Economy, Science & Technology*

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