



The Geopolitics of Critical Minerals: India's Strategic Positioning in the Global Supply Chain Reconfiguration

Aswani T D

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Abstract

The reconfiguration of global supply chains for critical minerals has emerged as one of the defining geopolitical issues of the twenty-first century. As the clean energy transition, digital infrastructure expansion, and defense modernization intensify demand for lithium, cobalt, nickel, rare earth elements, and other critical raw materials, governments are recasting their economic, diplomatic, and strategic policies to secure access to these resources. India, with its growing energy needs, ambitious electric vehicle targets, expanding semiconductor ambitions, and strategic concerns regarding Chinese supply chain dominance, has actively repositioned itself in this evolving landscape. This article examines the geopolitics of critical minerals through the lens of India's strategic positioning in the post-2020 supply chain reconfiguration. Drawing on a critical literature review methodology and theoretical frameworks from international political economy, geo-economics, and strategic resource studies, the study analyses peer-reviewed scholarship, government policy documents, multilateral initiatives, and industry reports published between 2018 and 2025. The analysis identifies four pillars of India's emerging critical minerals strategy: domestic exploration and production through revised mining frameworks; strategic overseas asset acquisition through Khanij Bidesh India Limited and bilateral partnerships; participation in plurilateral initiatives including the Mineral Security Partnership and the Quad; and demand-side measures including recycling, substitution, and the development of secondary sources. The study draws on resource statecraft, supply chain political economy, and Indian foreign policy scholarship. Findings indicate that India is moving toward a more coordinated multi-pillar approach, while facing significant challenges including limited domestic resources, slow mining sector reform, financing constraints, and the geopolitical complexity of partnerships in mineral-rich regions.

Keywords:- Critical Minerals, Geopolitics, Supply Chain, India, KABIL, Mineral Security Partnership, Geo-Economics, Strategic Resources

Introduction

Critical minerals have moved from a specialist concern of mining and metallurgy to a central preoccupation of contemporary geopolitics. Lithium, cobalt, nickel, graphite, and the seventeen rare earth elements, alongside copper, tin, tungsten, and a growing list of other materials, are essential inputs for the technologies that define the contemporary economy: electric vehicle batteries, wind turbines, solar photovoltaic modules, semiconductors, advanced electronics, and a wide range of defense systems. The clean energy transition, the global digital economy, and contemporary military modernization all depend on reliable access to these materials. Demand projections from the International Energy Agency and other authoritative sources indicate that

requirements for several critical minerals will multiply several times over by 2040, even under moderate decarbonization scenarios (International Energy Agency 2021, 2024).

The supply of critical minerals is highly concentrated. Mining, processing, and refining capacity for many critical minerals is dominated by a small number of countries, with China occupying a particularly significant position in processing and refining for several materials, in rare earth element production, and in battery component manufacturing (International Energy Agency 2021). The Democratic Republic of Congo, Indonesia, Australia, Chile, and several other countries hold critical positions in upstream mining for specific materials. This concentration of supply, coupled with growing demand and intensifying strategic competition, has produced significant supply chain vulnerabilities for major economies (Farrell & Newman 2019).

The COVID-19 pandemic, intensifying United States and China strategic competition, the Russian invasion of Ukraine, and the growing salience of economic statecraft have together accelerated a global reconfiguration of critical minerals supply chains (Blackwill & Harris 2016; Farrell & Newman 2019). The European Union's Critical Raw Materials Act, the United States Inflation Reduction Act, the Mineral Security Partnership and its expanded Forum, the Australian Critical Minerals Strategy, and Japan's long-standing critical materials policy all reflect a new era of resource statecraft in which states actively work to diversify, reshore, friendshore, or otherwise secure supply chains (European Commission 2024; Mineral Security Partnership 2023; U.S. Department of Energy 2023).

India occupies a distinctive position in this evolving landscape. As one of the fastest-growing major economies and the world's most populous country, India's critical minerals demand is set to expand substantially with its electric vehicle ambitions, its commitment to a 500 gigawatt non-fossil energy capacity target by 2030, its semiconductor manufacturing initiatives under the India Semiconductor Mission, and its defense modernization. India's domestic critical minerals endowment is uneven: significant resources of some minerals, but limited domestic reserves of others, and historically underdeveloped processing and refining capacity. The Government of India released a list of thirty critical minerals in 2023 and announced a Critical Minerals Mission in subsequent budget statements, signalling a major policy push (Bhandari & Agarwal 2023; Government of India 2023a; Observer Research Foundation 2024).

Against this backdrop, the present article asks:

- How is India strategically positioning itself in the global reconfiguration of critical mineral supply chains, and what theoretical and practical implications follow?
- Three subsidiary questions structure the inquiry. First, what theoretical frameworks most usefully analyse India's critical minerals strategy?
- Second, what are the major pillars of India's emerging strategy, and how do they interact?
- Third, what challenges and opportunities does India face, and what implications follow for foreign policy, industrial policy, and research?

The article makes three contributions. It synthesizes scholarship on critical minerals geopolitics with specific reference to India. It identifies four interlocking pillars that organize India's emerging strategic approach. It articulates implications for foreign policy, industrial policy, and academic research. The remainder of the article is organized as follows:

- Section 2 reviews relevant theory and evidence;
- Section 3 outlines the methodology;
- Section 4 presents the findings;
- Section 5 discusses implications;
- Section 6 concludes with directions for future research.

Literature Review

Theoretical Foundations

Several theoretical frameworks ground the analysis of critical minerals geopolitics. International political economy offers foundational insights into the politics of resource access, market structure, and state-market interaction. Recent geo-economic scholarship, drawing on the work of Robert Blackwill, Jennifer Harris, and others (Blackwill & Harris 2016), examines how states use economic instruments for strategic ends, including supply chain management, sanctions (Drezner 1999), investment screening, and industrial policy. The literature

on resource statecraft, building on the work of Llewelyn Hughes (2014), Phillip Lipsy, and others, attends specifically to how states secure access to critical resources through bilateral and multilateral diplomacy, state-owned enterprises, and strategic stockpiling (Andrews-Speed & Dannreuther, 2011).

The supply chain political economy literature, including work by Henry Yeung (2016), Inderjeet Parmar, and others, examines the dynamics of global value chains, lead firms, and the political economy of supply chain governance. The concept of weaponized interdependence, articulated by Henry Farrell and Abraham Newman (Farrell & Newman 2019), illuminates how dense supply chain interconnections can be exploited for coercive ends, with implications for the strategic management of critical minerals. Scholarship on the resource curse and on extractive industries political economy provides a counterbalance to purely strategic framings, highlighting the developmental, environmental, and human rights dimensions of mineral extraction (Andrews-Speed & Dannreuther 2011).

The Geopolitical Reconfiguration of Critical Mineral Supply Chains

The post-2020 reconfiguration of critical minerals supply chains has been driven by several converging factors. The intensifying strategic competition between the United States and China, the recognition of supply chain fragility during the COVID-19 pandemic, the energy security implications of the Russian invasion of Ukraine, and the rapidly increasing demand from clean energy and digital technologies have together produced a new strategic landscape (International Energy Agency 2024). Major economies have responded with a wave of policy initiatives. The European Union's Critical Raw Materials Act, adopted in 2024, sets benchmarks for domestic extraction, processing, and recycling, and identifies strategic projects for accelerated approval (European Commission 2024). The United States, through the Inflation Reduction Act and Department of Energy programmes, has made substantial commitments to onshoring and friendshoring critical mineral and battery supply chains (U.S. Department of Energy 2023).

The Mineral Security Partnership, established in 2022 and significantly expanded thereafter, brings together the United States, the European Union, the United Kingdom, Australia, Canada, Japan, France, Germany, Italy, Korea, Sweden, Finland, Norway, Estonia, and India in a coordinated effort to secure responsible critical mineral supply chains (Mineral Security Partnership 2023). The Quad, comprising Australia, India, Japan, and the United States, has identified critical and emerging technologies, including critical minerals, as a focus of cooperation (Saha & Joshi 2022). These plurilateral initiatives represent a significant shift toward like-minded coordination in resource statecraft (Arumugam & Bagchi 2024).

India's Critical Minerals Context and Policy Evolution

India's engagement with critical minerals has evolved significantly in recent years. The Geological Survey of India and the Atomic Minerals Directorate for Exploration and Research conduct domestic mineral exploration. Khanij Bidesh India Limited (KABIL), a joint venture among National Aluminium Company, Hindustan Copper, and Mineral Exploration and Consultancy Limited, was incorporated in 2019 with the mandate of identifying, exploring, acquiring, and developing strategic mineral assets overseas. The Ministry of Mines released India's first official list of thirty critical minerals in 2023, identifying lithium, cobalt, nickel, graphite, rare earth elements, and other materials as strategically important (Government of India 2023a). The Critical Minerals Mission, announced in subsequent Union Budget statements, signals a coordinated policy push including domestic exploration auctions, support for overseas asset acquisition, and incentives for processing capacity (Bhandari & Agarwal 2023; Khanij Bidesh India Limited 2023; Observer Research Foundation 2024).

India's domestic resource endowment includes significant reserves of some critical minerals, including limited but notable lithium reserves identified in Jammu and Kashmir, certain rare earth deposits in monazite-bearing beach sands, and reserves of various other materials (Vivekananda International Foundation, 2023). However, processing and refining capacity has historically lagged extraction, and the country imports substantial volumes of finished critical mineral products and intermediate materials. The Ministry of Mines has accelerated auctions of critical mineral blocks under amended legislation (Government of India 2023b), and offshore mineral exploration in India's Exclusive Economic Zone is also receiving increased attention.

Bilateral and Plurilateral Initiatives

India has actively pursued bilateral and plurilateral cooperation on critical minerals (Arumugam & Bagchi, 2024; Kalyanaraman 2024). Engagements include cooperation with Australia, a major critical minerals producer, on lithium and cobalt-related projects; cooperation with the United States on critical minerals and resilient supply chains under the iCET (Initiative on Critical and Emerging Technology) framework and successor initiatives; engagement with Japan, including under bilateral and Quad frameworks (Saha & Joshi 2022); cooperation with Argentina and Bolivia on lithium-related projects through KABIL (Khanij Bidesh India Limited, 2023); engagement with African producer countries; and active participation in the Mineral Security Partnership

Forum (Mineral Security Partnership, 2023). The simultaneous development of these multiple cooperation tracks reflects an explicitly diversified diplomatic strategy aimed at reducing single-source dependencies (Sridharan, 2023).

Research Gap

Despite this expanding policy and operational landscape, scholarly analysis of India's critical minerals strategy remains in early stages. Much of the available analysis is found in policy briefs, think tank reports, and journalistic coverage, with peer-reviewed integrative academic analysis lagging behind the pace of policy development. Theoretical engagement with the implications of India's strategy for international political economy, foreign policy, and industrial policy is uneven, and comparative analysis with other rising powers and resource-importing economies is limited. The present article seeks to address these gaps through a focused review and synthesis.

Methods

This study employs a critical literature review methodology with thematic synthesis, suitable for a fast-moving policy area where peer-reviewed scholarship is supplemented by significant policy and industry analysis. The review proceeded through four stages.

In the first stage, a structured search was conducted in Scopus, Web of Science, JSTOR, ProQuest, the Indian Citation Index, and Google Scholar. Search terms combined critical minerals, rare earth elements, lithium, cobalt, supply chain, geopolitics, geo-economics, India, KABIL, Mineral Security Partnership, Quad, and resource statecraft. The window was January 2018 to August 2025, with selected earlier theoretical works retained for grounding.

In the second stage, inclusion criteria specified peer-reviewed empirical or theoretical scholarship engaging with critical minerals geopolitics, supply chain reconfiguration, or India's critical minerals policy, with priority given to integrative analyses. Reports from research institutions including the International Energy Agency, the Observer Research Foundation, the Vivekananda International Foundation, the Centre for Strategic and International Studies, the International Institute for Strategic Studies, and the Brookings Institution were also reviewed. Exclusion criteria filtered out studies focused exclusively on extractive technical issues without political analysis, and non-peer-reviewed materials except where they addressed recent policy developments not yet covered in academic literature. After title, abstract, and full-text screening, sixty publications were retained for analysis.

In the third stage, supplementary materials were drawn from public policy documents including the Ministry of Mines list of critical minerals, Union Budget speeches and documents, KABIL annual reports, the Mineral Security Partnership joint statements, the European Union Critical Raw Materials Act text, and Mines and Minerals (Development and Regulation) Amendment Act texts. In the fourth stage, thematic synthesis generated four pillars of India's critical minerals strategy that structure the findings. As a literature-based study using publicly available secondary materials, the research did not require formal ethics approval. Standards of accurate citation, transparent reasoning, and balanced engagement with multiple analytical perspectives were maintained throughout.

Results

Pillar One: Domestic Exploration and Mining Sector Reform

The first pillar of India's critical minerals strategy concerns domestic exploration and mining sector reform. The amendment of the Mines and Minerals (Development and Regulation) Act in 2023, which permitted private sector participation in the exploration and mining of certain critical and atomic minerals, marked a significant policy shift (Government of India, 2023b). The conduct of national auctions of critical mineral blocks, the launch of an exploration policy designed to encourage private investment, the strengthening of the Geological Survey of India's mandate, and offshore mineral exploration initiatives all reflect a more active state in domestic upstream development (Government of India, 2023a; Observer Research Foundation, 2024).

The pillar faces several constraints. Indian critical mineral resources, while not negligible, are insufficient on their own to meet projected demand. Mining is environmentally sensitive and often takes place in or near tribal areas, raising significant questions of consent, environmental impact, and benefit-sharing under the Forest Rights Act and Panchayats (Extension to the Scheduled Areas) Act frameworks. Ramping up exploration to commercially viable projects requires significant time, capital, and technical capacity, and the institutional bandwidth of regulators is being tested by the pace of change.

Pillar Two: Strategic Overseas Asset Acquisition

The second pillar concerns strategic overseas asset acquisition, primarily through Khanij Bidesh India Limited and through state-owned enterprises with overseas operations (Khanij Bidesh India Limited, 2023). KABIL has been active in negotiations for lithium-related projects in Argentina and exploring opportunities in Australia, Chile, and other producer countries (Bhandari & Agarwal, 2023). Coal India Limited has reportedly explored opportunities in critical minerals adjacent to its core business. State-owned enterprises in the metals sector are also developing overseas plays.

The pillar faces challenges that are characteristic of resource diplomacy more broadly (Andrews-Speed & Dannreuther, 2011; Hughes, 2014). Securing competitive overseas assets in mineral-rich jurisdictions requires significant capital, technical expertise, and the ability to compete with established Chinese, Australian, Canadian, and other state-backed and private actors who have decades of presence and operational knowledge. Geopolitical complexity, including in jurisdictions where political stability, regulatory frameworks, or relations with host governments are evolving, introduces additional risk. Indian state enterprises and the financing system that supports them have historically been cautious in this domain compared with their Chinese counterparts, and questions about the speed, scale, and risk appetite of Indian overseas mineral diplomacy remain active (Kalyanaraman, 2024).

Pillar Three: Plurilateral Partnerships

The third pillar involves participation in plurilateral partnerships and frameworks. India joined the Mineral Security Partnership in 2023 and has actively engaged in the expanded Forum that brings together producer and consumer economies (Arumugam & Bagchi 2024; Mineral Security Partnership, 2023). Within the Quad, critical minerals have featured in cooperation discussions on resilient supply chains (Saha & Joshi 2022; Sridharan, 2023). Bilateral cooperation with Australia, the United States, Japan, and several European partners has been operationalized through joint working groups, financing instruments, and technical exchanges. Engagement with African producer countries through Indian government and private channels is also developing, building on India's long-standing diplomatic relationships in Africa.

These partnerships offer significant benefits, including access to financing, technology, exploration partnerships, and processing know-how, and they help to embed India in the like-minded coalition shaping the post-2020 critical minerals architecture. They also impose costs and tensions, including questions about how India balances participation in Western-led frameworks with its strategic autonomy doctrine and its engagements with non-aligned and non-Western partners (Mukerji & Kripalani 2022; Patnaik & Shah, 2020). India's simultaneous engagement with the Mineral Security Partnership and continued participation in BRICS-Plus and Shanghai Cooperation Organisation related discussions reflects this characteristic balancing (Sridharan 2023).

Pillar Four: Demand-Side Strategies

The fourth pillar concerns demand-side strategies including recycling, substitution, and the development of secondary sources. Battery recycling has been highlighted as a strategic priority in successive policy statements, and a Battery Waste Management Rules framework has been operationalized to support extended producer responsibility (NITI Aayog 2022). Research and development on substitution, including alternative chemistries that reduce reliance on the most constrained materials, is supported through several scientific and industrial programmes (Vivekananda International Foundation 2023). Urban mining of electronic waste, recovery of critical minerals from industrial by-products, and exploration of unconventional sources including offshore minerals all feature in the emerging strategy.

Demand-side strategies are particularly important given India's import dependence and the long lead times associated with primary mining and processing. They also align with circular economy and sustainability commitments that are increasingly central to India's climate and industrial policy frameworks. Scaling these strategies requires investment, regulatory clarity, technical capacity, and meaningful integration of the informal sector that handles a significant share of India's electronic and battery waste.

Discussion

The findings carry several important implications. Theoretically, they support an integrated framework that combines geo-economic, supply chain political economy, and resource statecraft perspectives. Each pillar identified, domestic exploration, overseas asset acquisition, plurilateral partnerships, and demand-side strategies, illustrates how contemporary critical minerals policy combines elements of state activism, market participation, and international cooperation in ways that exceed any single theoretical framework. The Indian case is particularly useful for theoretical development because it represents a major rising power whose strategy combines elements of strategic autonomy with deep engagement in plurilateral coordination.

For Indian foreign policy, the findings suggest a continuing centrality of critical minerals in bilateral and plurilateral diplomacy. Cooperation with Australia, the United States, Japan, and European partners is likely to deepen on critical minerals topics, even as engagement with African, Latin American, and Central Asian producer countries remains essential (Kalyanaraman 2024; Sridharan 2023). Strategic autonomy in the critical minerals domain will require careful navigation of partnerships with both like-minded democracies and producer countries whose political alignments may differ (Mukerji & Kripalani 2022). The Mineral Security Partnership Forum and Quad working groups offer significant institutional spaces for this navigation (Arumugam & Bagchi, 2024; Saha & Joshi 2022).

For Indian industrial policy, the findings emphasize the importance of integrated approaches that combine upstream mineral access with midstream processing and refining capacity, downstream manufacturing of batteries, electronics, and clean energy components, and end-of-life recovery and recycling. Each of these segments requires distinct policy interventions but is interdependent. Production-Linked Incentive schemes, semiconductor mission programmes, electric vehicle policy, and the Critical Minerals Mission collectively form an industrial policy ecosystem whose internal coordination will shape outcomes.

For research and academic engagement, the findings highlight several priorities. Comparative work between India and other rising powers, including Brazil, Indonesia, and South Africa, would clarify what is distinctive about the Indian approach. Comparative work between Indian critical minerals strategy and the strategies of major resource importers including Japan, Korea, and the European Union would illuminate the conditions under which different policy mixes succeed. Detailed sectoral studies, including on rare earth elements, lithium, cobalt, and the rapidly evolving battery materials sector, would provide empirical depth. Engagement with the developmental, environmental, and human rights dimensions of critical mineral extraction, including in tribal areas of India and in producer countries with which India is developing partnerships, is particularly important.

Several limitations of the present analysis warrant acknowledgment. As a literature-based study, it depends on the quality and coverage of available scholarship and policy documentation. The pace of policy development in this area means that some findings will require updating as initiatives mature, partnerships evolve, and outcomes become measurable. Confidential commercial and diplomatic dimensions of critical minerals strategy are by their nature difficult to access through open sources. The voices of communities affected by mineral extraction, both in India and in partner producer countries, are underrepresented in the formal literature, and primary research engaging these perspectives is essential for a complete picture.

Conclusion

This article has examined India's strategic positioning in the global reconfiguration of critical mineral supply chains. Through a critical literature review informed by international political economy, geo-economic, and resource statecraft frameworks, the analysis identified four interlocking pillars of India's emerging strategy: domestic exploration and mining sector reform; strategic overseas asset acquisition through KABIL and partner enterprises; plurilateral partnerships through the Mineral Security Partnership, the Quad, and bilateral arrangements; and demand-side strategies including recycling, substitution, and the development of secondary sources. Together, these pillars describe a coordinated and ambitious approach to critical minerals security that aligns with India's broader strategic and developmental objectives.

Three broader conclusions follow. First, critical minerals have become a structural concern of contemporary geopolitics, and India's strategic positioning is best understood as part of a global reconfiguration in which states actively manage supply chains rather than relying on market mechanisms alone. Second, India's emerging strategy combines elements of strategic autonomy with deep plurilateral engagement, reflecting characteristic features of contemporary Indian foreign policy. Third, success in this domain depends not only on resource diplomacy but on integrated industrial policy, environmental and social safeguards, and the development of human and institutional capacity over time.

Several directions for future research are warranted. Comparative studies between India and other rising powers and between India and major resource importers would clarify what is distinctive about the Indian approach. Detailed sectoral studies on specific critical minerals would provide empirical depth. Implementation-focused research on the auctioning, exploration, processing, and recycling components of the strategy would inform policy refinement. Studies of the geopolitical implications of India's critical minerals partnerships, including their interaction with strategic autonomy and engagement with non-Western partners, would address important international relations questions. Research engaging the developmental, environmental, and human rights dimensions of critical mineral extraction, including the perspectives of affected communities, is particularly necessary. By advancing such an agenda, political science and international relations scholarship can contribute to understanding one of the most consequential geopolitical transformations of the present era.

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