



**CANADIAN GLOBAL AFFAIRS INSTITUTE**  
**INSTITUT CANADIEN DES AFFAIRES MONDIALES**

# **A New Challenge Across Borders: Transatlantic Supply Chains?**

by Judy Alomari  
November 2025



**KONRAD  
ADENAUER  
STIFTUNG**



# WORKSHOP REPORT

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On November 5, 2025, the Konrad Adenauer Stiftung (KAS), the Canadian Global Affairs Institute (CGAI), and the Centre for Military, Security and Strategic Studies (CMSS) hosted a full-day workshop on strengthening trans-Atlantic cooperation in energy and critical minerals. The event brought together senior practitioners, researchers, industry representatives, and government officials for a detailed examination of Europe's resource vulnerabilities, Canada's strategic position, and the opportunities for deeper bilateral cooperation. This report provides a summary of the discussions held throughout the day.

## Introduction

The global energy and mineral landscape are changing rapidly. Europe's efforts to decrease reliance on Russian natural gas and reduce dependence on Chinese processing have placed energy security and critical mineral supply chains at the forefront of strategic planning. Meanwhile, the transition to clean energy is creating unprecedented demand for minerals vital to modern industry and defense. Canada is in a strong position to support these needs. Its abundant resources, high governance standards, and reputation as a democratic supplier make it a trustworthy partner for Europe. However, Canada's capacity to meet this demand is hindered by slow permitting processes, infrastructure shortages, and fragmented regulations. Throughout the workshop, speakers emphasized that institutional reform and transparent strategic direction will be key to whether Canada can turn its potential into meaningful influence. Furthermore, what emerged was a shared recognition that energy and minerals are no longer just economic sectors but also tools of national security and geopolitical strategy. Europe needs stable, democratic supply chains, and Canada should decide if it can deliver at the necessary pace.

The purpose of this workshop was to address these challenges directly and identify practical steps to strengthen Canada–Europe cooperation. Through discussions among policymakers, researchers, and industry leaders, the day aimed to move beyond diagnosis and toward specific, actionable recommendations.



## **Opening Remarks:**

The day began with brief remarks from **Dr. Bernd Althusmann** and **Ms. Megan Saito**, who welcomed participants and highlighted the value of collaboration between CMSS, CGAI, and KAS. Ms. Saito underscored the importance of interdisciplinary dialogue on energy and critical mineral security and expressed appreciation for KAS's continued support in fostering trans-Atlantic engagement.

## **Panel 1: Europe and Canada's Critical Mineral Needs and Infrastructure**

*Moderator:* Joe Calnan, CGAI.

*Panelists:* Eyab Al-Ayini, Canadian Climate Institute; Aaron Gasch Burnett, Democratic Strategy Initiative; Mark Ferguson, S&P Global; Richard Norris, CGAI.

The first panel established the strategic context for the day by outlining the pressures reshaping Europe's energy and mineral landscape and the implications for Canada. Panelists agreed that Europe's demand for critical minerals is rising far faster than Western extraction and processing can match. These demands are driven by three converging forces: the clean-energy transition, accelerated defence production, and Europe's determination to reduce dependence on Russian fuel and Chinese processing. This combination has created a structural supply gap that democratic partners must urgently address.

Europe's vulnerability was described as the emergence of a potential "cold war" in the energy sector, in which dependency on external suppliers limits political options. The "Rearm Europe" initiative and broader efforts to reindustrialize were discussed as attempts to rebuild European autonomy, but panelists emphasized that these efforts cannot succeed without secure, democratic suppliers.

The panel emphasized that Canada requires its own strategic shift, a Canadian "Zeitenwende." Participants argued that natural resources must be treated as instruments of national security and geopolitical leverage, rather than merely economic commodities. More transparent public communication, stronger federal-provincial coordination, and a more assertive policy posture were identified as essential steps toward making Canada a credible partner in Europe's long-term planning.

From an investment perspective, panelists noted that global firms continue to view Canada favourably, yet many projects risk being overtaken by jurisdictions that move more decisively. Before the invasion of Ukraine, [more than 40% of Europe's imported natural gas came from Russia](#), its single largest supplier, delivered via four main pipelines. Some European countries [relied on Russia](#) for more than 80% of their gas supply, including Austria and Latvia. But Germany was by far Russia's largest gas customer by volume, importing [nearly twice the](#)



[volume](#) of Italy, the next largest customer<sup>1</sup>. Now, since the invasion of Ukraine by Russia, Europe and specifically Germany is already turning to Norway, Qatar, and the United States for replacement gas, and China continues to dominate mineral processing. Unless Canada accelerates institutional reform, its competitive window will narrow.

The panel concluded that Europe's needs are immediate, Canada's potential is significant, and the speed of Canadian decision-making defines the gap between them.

### **Keynote Address: Alberta's Infrastructure Strategy**

*The Honourable Devin Dreeshen, Minister of Transportation and Economic Corridors*

Following a short break, Minister Devin Dreeshen delivered the keynote address outlining Alberta's infrastructure strategy and its relevance to trans-Atlantic energy and mineral ties. Alberta is actively expanding transportation corridors, including highway modernization, northern access routes, and interprovincial collaboration to support the movement of energy products, heavy equipment, and critical minerals.

Minister Dreeshen highlighted recent cooperation agreements with northern provinces and territories, including joint work on gateways to the Northwest Territories' significant mineral deposits. He emphasized ongoing investments in over 500 provincial infrastructure projects, including major upgrades to the Trans-Canada Highway and the development of new east-west and north-south corridors.

He noted that Germany is already Alberta's eighth-largest trading partner, and that Alberta's strategy includes expanding aviation infrastructure, new aerospace maintenance and propulsion facilities, along with targeted investment in airport modernization.

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<sup>1</sup> Brookings, [Europe's messy Russian gas divorce | Brookings](#)



## **Panel 2: LNG Markets and Trans-Atlantic Energy Security**

*Moderator:* Joe Calnan, CGAI.

*Panelists:* Dennis Trigylidas, Natural Resources Canada; Michelle Robichaud, Atlantica Centre for Energy.

The second panel examined Canada's capacity to support Europe's LNG needs. Panelists noted that European states are actively seeking to reduce reliance on suppliers such as Qatar and Russia, creating a potential opening for Canada. However, they emphasized that Canada's current infrastructure, particularly on the East Coast, remains insufficient to play a meaningful role in Europe's near-term diversification efforts. Regulatory timelines and project approvals continue to slow progress, and without additional export terminals, Canada cannot fully capitalize on demand from democratic partners.

Michelle Robichaud discussed that developments in the United States serve as a good example for Canada. The U.S. has rapidly expanded its LNG exports, demonstrating how quickly competitors are moving in global markets. She highlighted opportunities in Atlantic Canada, including port capacity in New Brunswick and facilities in St. John's, which could support future projects if Canada is able to advance them. At the same time, she and others noted that Europe is cautious about entering very long-term LNG contracts, meaning any Canadian contribution must balance commercial realities with strategic objectives. The panel concluded that substantial infrastructure investment, more predictable permitting, and strong partnerships with Indigenous communities, whose participation is essential to project legitimacy, will be required if Canada is to move from potential to practical contribution.

## **Panel 3: Future Visions for Canada–Europe Energy and Mineral Ties**

*Moderator:* Joe Calnan, VP Energy and Calgary Operations at CGAI.

*Panelists:* Heather Exner-Pirot, Macdonald-Laurier Institute; Robert M. Cutler, NATO

Association of Canada; Adriana Guatame-Garcia, Assistant Professor, University of Calgary.

The final panel examined long-term strategies to enhance transatlantic cooperation. Panelists observed that Canada and Europe often focus on different minerals; however, this difference offers opportunities rather than challenges. Historically, Canada has exported minerals like copper mainly to the United States because of its proximity, but shifting geopolitical pressures are encouraging Europe to increase its engagement with Canada.

Heather Exner-Pirot highlighted that critical mineral trade rarely happens directly between governments. Instead, companies handle the extraction, processing, and movement of minerals through global supply chains. Therefore, governments need to focus on creating favourable



conditions, such as regulatory certainty, transparent permitting processes, and access to infrastructure, that help facilitate private-sector activity. She emphasized that Canada must enable companies to operate globally while also supporting public-sector agreements that promote long-term cooperation.

Panelists agreed that Canada's ability to support European markets depends on the extraction and the development of processing and upgrading capacities that align with Europe's needs. They stressed that Canada must modernize at the same pace as its partners in order to remain competitive.

## **Closing Remarks**

*Kelly Ogle, Managing Director, CGAI*

CGAI Managing Director Kelly Ogle concluded the workshop by emphasizing that Canada stands at a strategic crossroads. The global system is shifting rapidly, and Canada must decide whether it intends to be a primary contributor to democratic energy and mineral security or remain on the margins. He reiterated that despite Canada's abundant potential, progress ultimately depends on political will, regulatory reform, and the capacity to execute.



## **Recommendations**

A consistent message throughout the workshop was that Canada needs to accelerate its efforts to support secure, democratic energy and mineral supply chains. The following recommendations highlight areas where progress can be made in strengthening cooperation with Europe.

- 1. Accelerate Permitting and Regulatory Modernization:** Canada should shift from slow, risk-averse regulatory practices to a more efficient system that enables timely development while upholding high environmental standards. Major resource projects often take more than a decade to complete, eroding investor confidence and diminishing Canada's competitiveness. Furthermore, a comprehensive review of permitting frameworks is necessary to eliminate redundant processes, clarify decision-making authority, and establish predictable timelines aligned with global best practices. Collaboration with European regulatory initiatives, including recognition of strategic project status, will be crucial for attracting investment and integrating supply chains.
- 2. Integrate Natural Resources Into National Security Strategy:** Workshop participants emphasized that natural resources are now central to national security, defence readiness, and democratic resilience. Canada must formally articulate this reality through a modernized national security strategy that recognizes LNG and critical minerals as strategic assets. Such a strategy should outline how Canadian resources support the security of allies, reduce dependence on authoritarian suppliers, and contribute to collective deterrence and economic stability. Leadership will be required to communicate this shift clearly to Canadians and align departmental mandates with strategic objectives.
- 3. Invest in Strategic Infrastructure Corridors:** Canada's ability to serve Europe's energy and mineral needs depends on its capacity to transport resources efficiently across vast distances. Investments in northern access roads, rail networks, port expansions, transmission lines, and LNG export terminals are necessary to expand both domestic resilience and export capability. Collaboration with provinces, territories, and Indigenous communities will be essential to ensuring that infrastructure aligns with regional development priorities and supports long-term economic and security objectives.
- 4. Deepen Alignment With European ESG and Traceability Standards:** As Europe implements increasingly strict ESG and traceability requirements, Canada must adopt compatible standards to ensure seamless integration into trans-Atlantic supply chains. This includes transparent carbon-intensity measurement, interoperable digital traceability systems, and consistent reporting frameworks. Such alignment will reduce administrative barriers, speed regulatory approvals, and strengthen investor confidence in Canadian projects.
- 5. Expand Domestic Refining and Processing Capacity:** To move beyond its traditional role as a supplier of raw materials, Canada must expand its domestic capacity



to refine and process critical minerals. Refining and processing are essential elements of a resilient supply chain and are increasingly important to European partners who rely on advanced materials rather than raw resources alone. Building processing facilities in Canada would enhance value creation, reduce reliance on foreign suppliers, and position Canada as a comprehensive supplier capable of supporting advanced manufacturing and the deployment of clean technology.

- 6. Strengthen Infrastructure Security and Resilience:** Participants underscored that critical energy and mineral infrastructure is now a strategic domain. The rise of hybrid threats, including attacks on pipelines and subsea cables, demands stronger protective measures. Canada should work closely with NATO and EU partners to enhance physical and cyber protections, develop advanced monitoring capabilities, and establish shared response frameworks. Ensuring the safety and reliability of infrastructure corridors will be fundamental to maintaining the confidence of both domestic and international partners.
- 7. Enhancing Canada's Role in Global LNG Markets:** Lastly, Canada's potential as an LNG exporter remains significant, both for Europe's long-term energy security and for Asia's immediate demand. While European buyers seek diversification from Russian gas, Canada currently lacks the infrastructure to supply LNG at scale. A coordinated federal-provincial approach is required to advance LNG terminal construction, clarify regulatory expectations, and improve investment certainty. As global markets shift, Canada must ensure it can participate effectively in both Atlantic and Pacific LNG flows.

The workshop's discussions highlighted that Canada and Europe share both a strategic requirement and a clear opportunity to strengthen cooperation on energy and critical minerals. Participants agreed that Canada possesses the resources and governance strengths to take on a larger role. However, progress depends on overcoming practical barriers discussed throughout the day: lengthy permitting processes, limited infrastructure capacity, inconsistent policy coordination, and the need for stronger partnerships with Indigenous communities. Panelists repeatedly stressed that Europe's demand is immediate and that Canada's competitiveness will depend on its ability to act more swiftly and with a clearer purpose. If Canada can prioritize these issues, it will be better prepared to meet Europe's needs and contribute significantly to more secure, democratic supply chains.

## ▶ **About the Author**

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**Judy Alomari** is a master's student in the Centre for Military, Security and Strategic Studies at the University of Calgary. Her work focuses on Canadian defence and Arctic security. She participates in CMSS policy engagement initiatives and has contributed to research on national security strategy, the laws of armed conflict, and Canada's evolving role in the circumpolar region.

## ► **Canadian Global Affairs Institute**

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