In Critical Condition

KAZAKHSTAN'S MULTI-VECTOR FOREIGN POLICY IN THE CRITICAL-MINERALS SECTOR AND ITS IMPLICATIONS FOR FUTURE US-KAZAKHSTAN RELATIONS

THE PROBLEM

Kazakhstan holds the largest economy in Central Asia — roughly **60% of the region's GDP** — yet it borders two U.S. adversaries. As Astana pursues integration and economic diversification, the United States is falling behind in bilateral trade, risking its influence over critical minerals, nuclear energy, and the wider relationship to Russia and China.

A MULTI-VECTOR STRATEGY

Since 1992, Kazakhstan has practiced a **"multi-vector"** foreign policy: strategic non-alignment that avoids overdependence on any single power. It deliberately courts investment from Russia, China, and the U.S. at once — maximizing leverage while preserving sovereignty.

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MINERAL ABUNDANCE

$46T
Estimated value of Kazakhstan's minerals

124
Deposits holding rare & rare-earth elements

5,000+
Identified mineral deposits

25%
Of the world's uranium reserves

RISING GAP IN ECONOMIC INFLUENCE

2022 MINERAL EXPORTS FROM KAZAKHSTAN

China	$2.87B
Russia	$1.22B
United States	$21M

U.S. mineral imports are a mere fraction of its rivals'

LESSONS LEARNED

1. **Outdated trade policies hinder economic success**
   Jackson–Vanik stifles US investment. Pass H.R. 1024 and grant Kazakhstan Permanent Normal Trade Relations.
2. **Necessary to invest in underdeveloped industries**
   Fund refineries, processing plants, and rare-earth production to loosen China's grip on the supply chain.
3. **Work with Kazakhstan's foreign policy, not against**
   Offer a credible alternative to Rosatom and CNNC as Kazakhstan builds its nuclear energy capabilities. Present cooperation as an opportunity, not a necessity.

MAJOR TAKEAWAY

The U.S. should compete to become an indispensible partner — without expecting Kazakhstan to stray from its multi-vector approach.

Investing in critical minerals is both an economic opportunity and a strategic imperative for bolstering national security and regional influence.

A DECADE OF COLLABORATION
Milestones in the race for Kazakhstan's minerals and geopolitical influence

2013
Kazakhstan becomes the first nation to join China's Belt & Road Initiative.

2023
Washington launches the C5+1 Critical Minerals Dialogue.

2024
State Dept. MoU; Kazakhstan joins Minerals Security Partnership; Chinese Jiaxin develops its first tungsten processing plant.

2025
TRIPP corridor announced; Trump & Tokayev sign a critical-minerals MoU.

2050
Kazakhstan targets 3–4 new nuclear plants — initial bids won by Russian and Chinese nuclear corporations.

THE BOTTOM LINE | Kazakhstan will keep adhereing to its multi-vector foreign policy. Through sustained engagement and targeted investment, the US can actively shape the next era of bilateral relations.

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