

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.

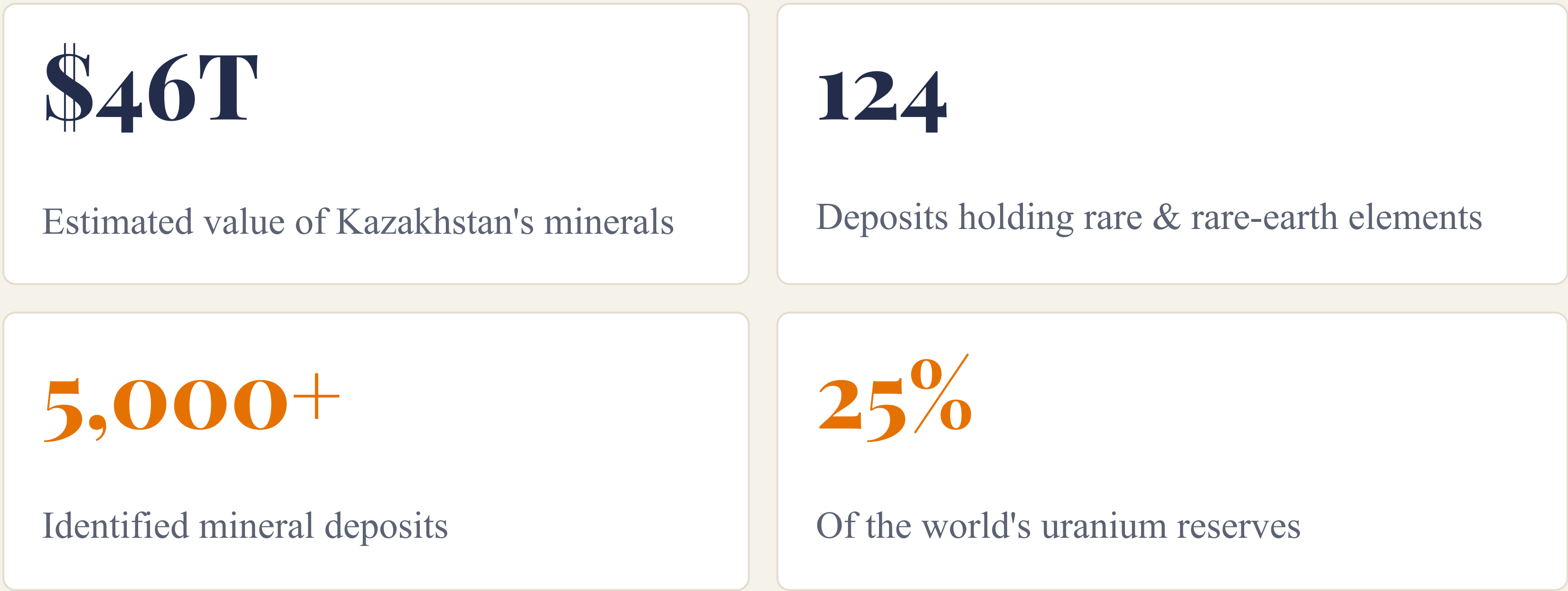
A MULTI-VECTOR STRATEGY

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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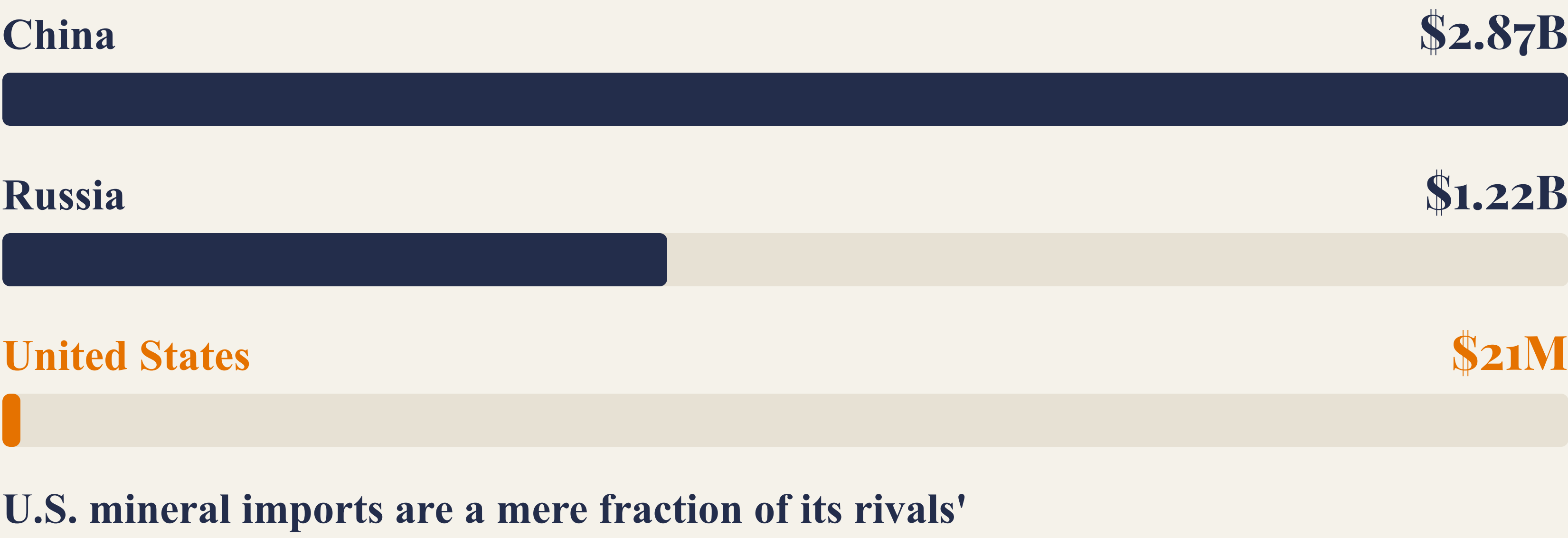


MINERAL ABUNDANCE



RISING GAP IN ECONOMIC INFLUENCE

2022 MINERAL EXPORTS FROM KAZAKHSTAN



LESSONS LEARNED

- Outdated trade policies hinder economic success**
Jackson–Vanik stifles US investment. Pass H.R. 1024 and grant Kazakhstan Permanent Normal Trade Relations.
- Necessary to invest in underdeveloped industries**
Fund refineries, processing plants, and rare-earth production to loosen China's grip on the supply chain.
- 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 indispensable 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



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