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In Critical Condition:

**Kazakhstan's Multi-Vector Foreign Policy Approach to Critical Minerals
Cooperation and its Implications for the Future of US-Kazakhstan Relations**

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Executive Summary

Kazakhstan has pursued a multi-vector foreign policy to avoid becoming dependent on any one nation for security assistance and economic support. This paper examines how the nation's strategic non-alignment manifests itself within Kazakhstan's critical minerals sector and how it shapes bilateral engagement with the United States, Russia, and China. To effectively reflect and prepare for the future of US-Kazakhstan relations, the United States can draw upon the following lessons from Kazakhstan's critical mineral cooperation to address policy gaps and potential next steps:

- Bilateral economic trade is burdened by outdated policies.
- US investment in Kazakhstan's critical mineral sector is being outpaced by competitors.
- The United States needs to work with Kazakhstan's multi-vector foreign policy, not against.

Problem Statement

Kazakhstan currently holds the largest economy in Central Asia – accounting for roughly 60% of the region's GDP – while sharing borders with major US adversaries. The United States is falling behind in bilateral trade with Kazakhstan, which may prove detrimental for critical minerals cooperation, nuclear energy, and future relations. If the United States fails to capitalize on Kazakhstan's pursuit towards international integration and economic diversification, the US risks surrendering its influence to Russia and China due to its failure in establishing a competitive and durable presence.

Background

The Republic of Kazakhstan declared its independence from the Union of Soviet Socialist Republics (USSR) in December of 1991 – the last republic to secede before the Soviet Union dissolved.ⁱ The United States (US) was among the first of nations to recognize Kazakhstan and formally establish diplomatic relations, which has continued to develop over the last thirty-five years.ⁱⁱ However, due to the nation's geographic location and historic affiliation, stronger ties have been formed with Russia and China through defense pacts like the Collective Security Treaty Organization (CSTO) and economic development projects like the Belt and Road Initiative (BRI). Despite shared borders, cultural sentiments, and mutually beneficial arrangements, Kazakhstan maintains its “multi-vector” foreign policy to reduce the nation's overdependence on any one state.

Multi-Vector Foreign Policy

Kazakhstan's multi-vector foreign policy is a curated diplomatic strategy that surrounds strategic non-alignment and neutrality.ⁱⁱⁱ The concept was introduced in 1992 by the nation's first president, Nursultan Nazabayev, but wasn't officially codified until the Foreign Policy Concept 2014-2020 was adopted.^{iv} This approach grants the nation immense flexibility when it comes to

preserving state sovereignty while attracting security agreements and diversifying economic partners. Kazakhstan's commitment to non-alignment is underscored by the nation's participation in the international frameworks listed in Appendix A.

***Critical Mineral Abundance*¹**

As of 2024, Kazakhstan has identified more than 5,000 mineral deposits valued over \$46 trillion, 124 of which are home to rare metals and rare-earth metals.^{viii} The nation currently holds a quarter of global uranium reserves and ranks among the top ten countries for production of titanium, zinc, and lead.^{ix} Kazakhstan actively produces or has substantial reserves for nearly half of the critical minerals that have been identified by the United States Geological Survey (USGS).^{xi} Furthermore, recent discoveries have confirmed that the Kuirektykol deposit is estimated to hold more than twenty-million metric tons of rare-earth materials, which could substantially alter the industry and shift economic reliance away from China.^{xii}

Critical Mineral Cooperation

As a major hub for critical mineral reserves, Kazakhstan has consistently and deliberately chosen to pursue deals with Russia, China, and the United States, striving to maximize investment and diversify its markets wherever possible. By outlining Kazakhstan's critical mineral cooperation with global powers, it becomes evident that the nation's multi-vector foreign policy and strategic neutrality is vital to its economic wellbeing and national security.

Russia

As a former Soviet republic and neighboring state, Russia has placed immense interest in maintaining ties with Kazakhstan, especially surrounding critical minerals that are vital for the Russia's economy, national defense, and advanced technologies. Rosatom – a Russian state-owned corporation – controls nearly a quarter of Kazakhstan's uranium reserves and held stakes in major deposits like the Zarechnoye Mine, the Akdala Deposit, and the Severny Kharasan Deposit.^{xiii} However, a Rosatom subsidiary, Uranium One Group, has recently sold its share in Zarechnoye mine to Astana Mining Company and gave up 30% in both Khorasan-U and Kyzylkum LLP to a company owned by China General Nuclear Power Corporation.^{xv} While these actions may signal a potential drawdown of Russian influence in Kazakhstan's critical minerals sector, they were likely taken to avoid complications with Western sanctions.

Despite recent divestments and growing international competition, Kazakhstan-Russia critical mineral collaboration does not appear to be waning.

- In recent years, Kazakhstan has supplied Russia with nearly half of its uranium and accounted for roughly 90% of the Federation's chromium ore imports. In 2023 alone,

¹ See Appendix B for more information about Kazakhstan's critical minerals.

Kazakhstan exported more than \$113 million worth of zinc ores and concentrates to Russia.^{xixxxxi}

- Specialists from Kazakhstan’s Central Geological Survey LLP conducted a study in collaboration with scientists from Russia’s Tomsk Polytechnic University to confirm that the recently discovered South Irgiz deposit may be one of the world’s largest sources of rare earth minerals.^{xxii}
- As a parent company, Rosatom maintains a 49% stake in the Budenovskoye Deposit, but recent violations bring this relationship into question.^{xxiii}^{xxiv}

China

Since 2005, China has invested more than \$27 billion into Kazakhstan, underscoring the strategic and economic value placed on advancing the bilateral partnership. Kazakhstan was the first nation to join China’s Belt and Road Initiative (BRI) in 2013 and has become vital to its overall success. Through major financial and infrastructural investments that heavily focus on the nation’s mining, smelting, and transportation sectors, China holds major stakes in the critical minerals sector and has received economic prosperity in return. As of 2024, there were 96 Chinese companies operating within Kazakhstan’s mining industry, primarily centralized in western Kazakhstan.

Given China’s global dominance in critical mineral processing, Kazakhstan heavily relies on the nation for infrastructural support and economic cooperation.

- China accounts for roughly 27% of Kazakhstan’s total mineral exports and is the lead importer of the nation’s copper, tungsten, and niobium.
- Kazakhstan’s NAC Kazatomprom signed \$5 billion in deals with Chinese companies in 2015. CGN Mining Co Ltd – the overseas financing and investment platform for China General Nuclear Power Group (CGN) – holds 49% shares in uranium-focused projects at the following deposits: Tselinny, Irkol, Central Mynkuduk, and Zhalspak.
- Due to China’s production and processing of more than 80% of tungsten globally, it comes to no surprise that the nation absorbs nearly all of Kazakhstan’s tungsten ores and concentrates. A joint venture was launched in 2024 for the creation of Kazakhstan’s first tungsten processing plant in partnership with Jiaxin International Resources Investment

United States

Critical mineral collaboration between the United States and Kazakhstan didn’t fully actualize until President Biden introduced the C5+1 Critical Minerals Dialogue in 2023.^{xxv} The following years were defined by the development and execution of agreements and projects designed to enhance bilateral relations and coordination between the two nations. In 2024, the US Department of State – with the Kazakh National Geological Survey and National Mining Company, Tau-Ken Samruk – signed a Memorandum of Understanding (MoU) to expand and

diversify supply chains.^{xxvi} Concurrently, the nation joined the US-led Minerals Security Partnership (MSP) Forum.^{xxvii}

After President Trump took office in 2025, critical minerals came to the forefront of the administration's regional objectives. Despite recent investment and economic ventures, the US falls short in competing for Kazakhstan's mineral exports (see Appendix C).

- In March, Cove Kaz completed a joint venture with one of Tau-Ken Samruk's subsidiaries.^{xxviii} The venture focused on the development and exploration of the Akbulak Rare Earth Project, which is home to 380,000 tons of rare earth oxides like praseodymium, neodymium, and yttrium.^{xxix}
- In August, the Trump Route for International Peace and Prosperity (TRIPP) was announced after successfully brokering an agreement between Armenia and Azerbaijan.^{xxx} The route will connect to the Trans-Caspian International Transport Route (TITR) and provide Kazakhstan with alternate transportation to the Eurasian Northern Corridor, which has become less viable due to the Ukraine War and increasing Western sanctions, raising concerns surrounding supply chain disruptions.^{xxxi}
- Alongside major business deals, President Trump and President Tokayev met in November and signed a Memorandum of Understanding on critical minerals cooperation that focused on processing, development, and exploration.^{xxxii} Cove Capital reached an agreement with the Government of Kazakhstan concerning the undeveloped tungsten and molybdenum ore deposits, Northern Katpar (Severnii Katpar) and Upper Kairakty.^{xxxiii}

Policy Implications for the United States

Through an analysis of Kazakhstan's bilateral cooperation with major global powers, it has become evident that the United States has underperformed and failed to fruitfully capitalize on the lucrative nature of Kazakhstan's critical mineral industry. Kazakhstan's strategic non-alignment and open collaboration between the United States, Russia, and China on critical minerals provides insight into the state's broader international objectives and presents an opportunity for the US to leverage the nation's willingness to diversify its partners and engagements across all sectors. To combat rising global competition and fundamentally prevent Kazakhstan from becoming overly reliant on its neighbors for economic and security support, the United States should carefully curate its foreign policy approach to promote mutual wellbeing through agreements and joint ventures designed to enhance bilateral relations.

However, deliberate action must be taken to avoid undermining Kazakhstan's pursuit of autonomy and support the nation's growing international presence. Directly pressuring Kazakhstan to stifle economic collaboration or security cooperation with US adversaries ultimately risks pushing the nation further away. The following lessons can be drawn from Kazakhstan's critical mineral cooperation and applied to high-value sectors that will enhance future US-Kazakhstan relations.

Economic trade is burdened by outdated policies.

The overall trade value between Kazakhstan and the United States is a mere fraction of the bilateral trade that occurs annually between Kazakhstan and its dominant neighbors (see Appendix D). In 2025, US-Kazakhstan trade across all sectors reached \$3.2 billion, while trade turnover hit \$29 billion with Russia and \$39.8 billion with China.^{xxxivxxxvxxxvi} Outdated policies like the Jackson-Vanik amendment stifle economic opportunities.

The Jackson-Vanik amendment was introduced during the Cold War to pressure the Soviet Union into reducing its restrictions on the emigration of Soviet Jews.^{xxxvii} The amendment still applies to Kazakhstan as a former Soviet republic, fundamentally limiting US foreign investment and subjecting the nation to annual review. Kazakhstan has received temporary Normal Trade Relations (NTR) since 1992, but current US lawmakers have proposed H.R. 1024 to eliminate the amendment's applicability and grant the nation with Permanent Normal Trade Relations (PNTR) status – providing Kazakhstan with an opportunity to present itself as a secure market for business investment and future cooperation.^{xxxviiixxxix}

US investment in Kazakhstan's critical mineral sector is being outpaced by competitors.

Kazakhstan is currently trying to reduce its dependence on any single partner to bypass potential supply chain disruptions and capture more economic value. While the country has facilities to refine minerals like copper, zinc, and lead, it is forced to export minerals like cobalt, nickel, and lithium due to a lack of sufficient processing capabilities.^{xl} The United States can support projects surrounding internal production of rare earth elements, construction of new processing plants, and the development of mineral refineries. The US should position its collaboration and financial aid as an opportunity to reduce Kazakhstan's inadvertent reinforcement of China's production dominance and Russia's influence through the introduction of alternate investors and markets.

The United States needs to work with Kazakhstan's multi-vector foreign policy, not against.

The US should capitalize on the nation's historic commitment to strategic non-alignment and nuclear non-proliferation to seek out opportunities to advance bilateral relations.

Kazakhstan currently produces 40% of the world's uranium and exports virtually all of it.^{xli} However, recent proposals by the Kazakh government suggest the nation is working to internally reap more of the benefits. Kazakhstan's Nuclear Industry Development Strategy aims for the construction of three to four nuclear power plants by 2050 to ensure energy security.^{xlii} Recent bids for the development of the first two have been won by Russia's Rosatom and the China National Nuclear Corporation (CNNC).^{xliii} There were also bids from Korea Hydro & Nuclear Power (KHNP) and Électricité de France (EDF).^{xliv} It is likely that Kazakhstan will seek to diversify its partners for future projects and present the US with an opportunity to directly increase its engagement.

Appendix A: Kazakhstan Participation in International Frameworks

Chinese-led

Belt and Road Initiative (BRI): President Xi Jinping first announced BRI during his visit to Kazakhstan in 2013.^{xlvi} The initiative surrounds economic development and the creation of massive infrastructure projects originally designed to connect East Asia to Europe.^{xlviixlviii} Since then, BRI has expanded to Latin America, Africa, and Oceania.^{xlviix}

Boao Forum for Asia: An international organization and non-profit that serves as a platform for collaboration among Asia's government officials, business leaders, and academic scholars.^{xlviix} The first conference was held in February 2001, and Kazakhstan was among its 26 founding members.^{lii}

China-Central Asia Mechanism: The mechanism – sometimes referred to as C+C5 Framework – was proposed and established in 2020 as an economic and diplomatic platform.^{lii} Designed to ensure border security, deepen regional integration, and expand economic ties.^{liii}

Russian-led

Collective Security Treaty Organization (CSTO): Initially founded as a mutual defense pact in May 1992 when post-Soviet states signed the Collective Security Treaty (CST).^{liv} Kazakhstan renewed its participation when CST was formally upgraded to an intergovernmental military alliance (CSTO) in 2002.^{lv}

Commonwealth of Independent States (CIS): Association developed on December 8, 1991, to promote peace, ensure protection of human rights, advance economic and social development.^{lvi} Kazakhstan joined on December 21st, just five days after it formally declared its independence.^{lvii}

Eurasian Economic Union (EAEU): Designed to enhance regional economic integration in northern Eurasia by coordinating economic policy and eliminating non-tariff trade barriers.^{lviii} Kazakhstan signed the treaty in May 2014, but EAEU was officially established in January 2015.^{lix} Operates in a similar manner to the European Union (EU).

US-led

Forum on Resource Geostrategic Engagement (FORGE): The primary objective is to promote collaboration on policy and projects designed to advance critical minerals supply chains.^{lx} The Forum was established in February 2026 as the successor to the Minerals Security Partnership (MSP).^{lxi} MSP was established in June 2022 as and Kazakhstan officially joined in July 2024.^{lxiiilxiii}

Abraham Accords: The Abraham Accords are a series of US-brokered bilateral agreements that first took place in September 2020 and are designed to promote cooperation between Israel and the Muslim world.^{lxiv} Kazakhstan joined the Accords in November 2025, becoming the first Central Asian country to do so.^{lxvixvi}

C5+1: The platform was established in 2015 to focus on coordination between the US and Central Asia, designed to support engagement on three pillars: security, economic, and energy.^{lxvii}

Other

Euro-Atlantic Partnership Council (EAPC): Forum designed to facilitate cooperation between NATO members and partner countries in the Central Asia, the Caucasus, and Europe.^{lxviii} Kazakhstan was brought into EAPC at its inauguration in May 1997 after the council succeeded the North Atlantic Cooperation Council (NACC) – which Kazakhstan had previously joined in 1992.^{lxix}

International Atomic Energy Agency (IAEA): Designed to promote peaceful use of nuclear technologies. Kazakhstan joined in 1994.^{lxx}

Organization for Security and Cooperation in Europe (OSCE): Regional security organization established during the Cold War to establish negotiation between East and West.^{lxxi} Kazakhstan joined on January 30, 1992.^{lxxii}

Organization of Islamic Cooperation (OIC): Designed to protect interests of Muslims globally and promote peace.^{lxxiii} The OIC is the second largest international governmental organization after the UN.^{lxxiv} Kazakhstan joined the organization in 1995.^{lxxv}

Shanghai Cooperation Organization (SCO): A Eurasian security, political, and economic intergovernmental organization established primarily to demilitarize borders. Kazakhstan was a founding member when the organization was created in 2001.^{lxxvi} SCO's objectives have expanded towards counterterrorism, intelligence sharing, and military cooperation.^{lxxvii}

Treaty on the Non-Proliferation of Nuclear Weapons (NPT): International agreement aimed at preventing nuclear proliferation while striving towards nuclear disarmament. Kazakhstan officially joined on February 14, 1994.^{lxxviii}

United Nations (UN): International organization designed to maintain peace and security through friendly relations among nations.^{lxxix} Kazakhstan officially joined the UN in March 1992.^{lxxx}

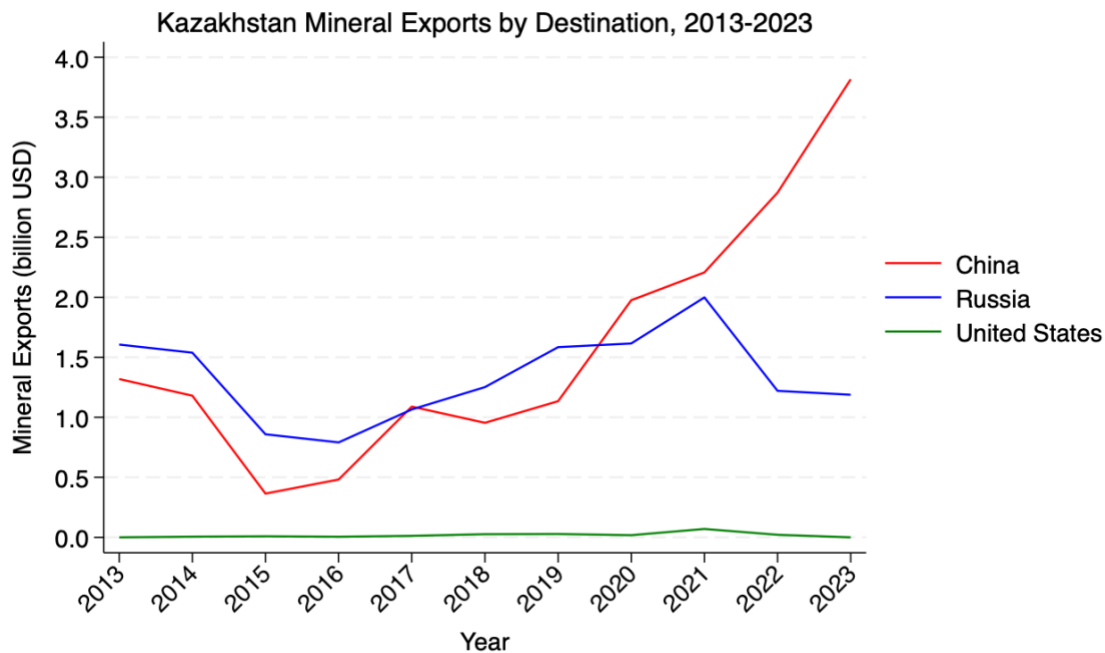
World Trade Organization (WTO): International organization that deals with “the rules of trade between nations.” Kazakhstan was finally admitted into the WTO in 2015 after nearly 20 years of negotiations.^{lxxxi}

Appendix B: Information on Critical Minerals found within Kazakhstan ^{lxxxii}

	Reserves (tons)	Major Deposits	Primary Regions
Barite	85,000 (metric)	Zhairem Ore Field, Ushkatyn-III, KAurtas, Maikain	Karaganda, Mangystau
Bauxite	160,000,000	Townsore, Vostochno-Ayatskoye mine, Krasnooktyabrskoye	Kostanay
Beryllium	58,000 – 117,500	Nura-Taldy, Karazhal, Belogorskoe Ta-Be, Asuhulak ore field	East Kazakhstan, Karaganda
Chrome Ore	230,000,000 (metric)	Kempirsai Chromite Deposit, Voskhod Mine, Pervomayskoye	Aktobe
Cobalt	55,000	Gornostayevskoye, Shevchenkovskoye	Abay, Aktobe
Copper	20,000,000 – 36,000,000	Zhezkazgan, Bozshakol, Aktogay	East Kazakhstan, Karaganda, Pavlodar
Lead	2,000,000 – 5,000,000	Akzhal Zinc-Lead Mine, Zhairemsky Mine, Oskemen Mine, Shalkiya	Karaganda, East Kazakhstan
Lithium	226,900	Bakennoye, Maralushenskoye, Akhmetkino	East Kazakhstan, Almaty, Kyzylorda
Manganese	600,000,000	Zapadny Karazhan, Ushkatyn III, Tasoba, Mangyshlak	Central Kazakhstan, Mangystau
Molybdenum	1,000,000	Verkhneye Karakty, Boguty, Karaoba, Koktenkol	Central Kazakhstan, Karaganda
Nickel	841,000 – 1,500,000	Gornostayevskoye, Shevchenko Mine	East Kazakhstan, Aktobe
Niobium	27,200 – 500,000	Sarybulak, Kuirektykol	Northern Kazakhstan, Karagandy
Phosphate	1,800,000 – 23,000,000 +	Karatau, Chilisai	Zhambul, Aktobe
Tantalum	4,600	Syrymbet, Sarybulak, Ortalyk, Belogorsky, Verkhne-Baymurzinskoe	Northern Kazakhstan, East Kazakhstan
Titanium	15,000,000 – 60,000,000	Satpayev, Karaotkel	East Kazakhstan
Tungsten	2,200,000 – 2,400,000	Upper Kayrakty, Boguty, Karaoba, Koktenkol, North Katpar	Karaganda, Almaty
Uranium	2,900,000	Chu Sarysu basin, Syr Darya basins	Southern Kazakhstan
Vanadium	–	Balasausqandiq	Kyzylorda
Zinc	6,700,000–16,000,000	Ridder-Sokolnoye, Maleeyskoye, Shalkiya, Zyryanovsk mine	East Kazakhstan, Karaganda, Kyzylorda

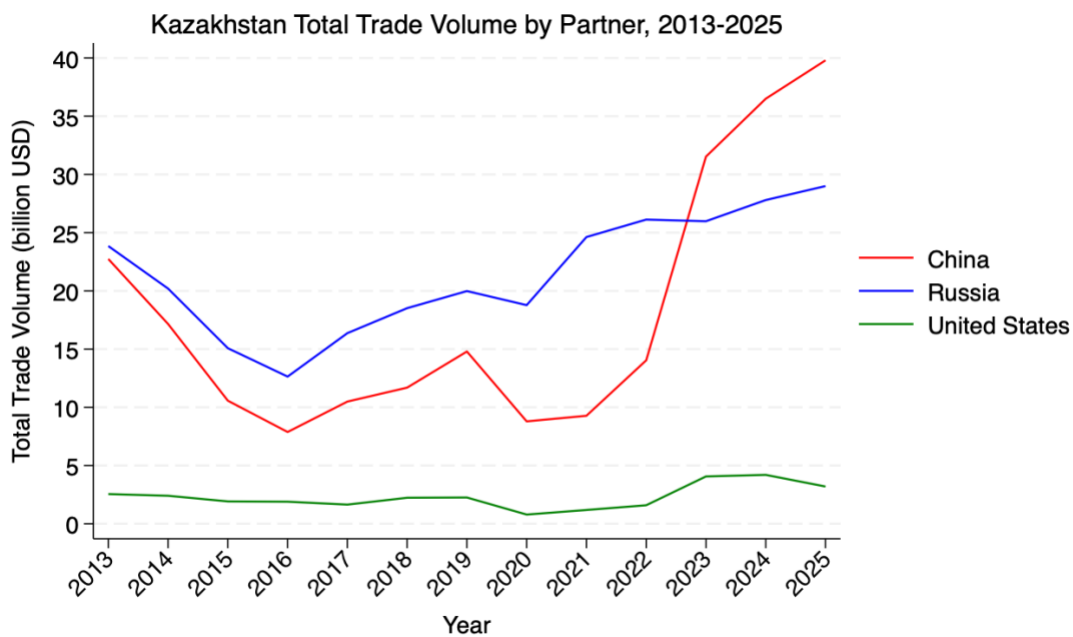
Note: Critical minerals like antimony, bismuth, gallium, germanium, rhenium, and scandium are primarily recovered as byproducts during the processing of other materials.

Appendix C



Data: World Integrated Trade Solution (WITS)^{lxxxiii}

Appendix D



Data: World Integrated Trade Solution (WITS)^{lxxxiv}

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