IRSTI: 19.45.91
DOI: https://doi.org/10.47344/awq0qx56

Framing Kazakhstan's Critical Minerals: An Emerging Discourse in Local Media

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Abstract

As competition over critical minerals intensifies, Kazakhstan has gained visibility in debates on resource security and supply-chain diversification, often being presented internationally as an alternative to China or as a potential frontier for geopolitical rivalry. This paper examines a relatively unexplored dimension of this debate, asking how critical minerals are framed in Kazakhstani media and what these representations reveal about the country's development ambitions. Drawing on framing theory, it identifies two dominant frames: geopolitical diversification and economic development. The first presents critical minerals as an opportunity for Kazakhstan to broaden its partnerships and strengthen its room for manoeuvre through its established multivector foreign policy. The second frames them as a crucial source of investment and economic growth. Across both frames, the emphasis falls primarily on reserves, production potential and investment deals. The analysis highlights a gap between official ambitions and the limited attention given to how they might translate into practice. By comparison, socio-environmental impacts and the distribution of the costs and benefits of extraction receive relatively little attention. Frames linking these commodities to the energy transition and defense are also largely absent. The findings suggest that domestic media discourse mainly reproduces a state-centered vision of critical minerals as a source of geopolitical leverage and economic opportunity, while leaving the terms and consequences of resource-led development underexplored. Finally, Kazakhstan's emergence as a critical-minerals supplier does not in itself mean a departure from extractivism; its implications depend on how resources are governed, where value is captured and whose interests shape development.

Keywords: critical minerals, energy transition, local media, Kazakhstan, framing theory, multivectorism.

Introduction

Kazakhstan is often described as possessing almost all the elements of the Mendeleev periodic table. The country is the world's largest producer of uranium, ranks among the top 20 countries in terms of copper, cadmium and bauxite reserves, and has considerable deposits of rare earth elements (AIFC, 2024; Kalra et al., 2026; Polishchuk et al., 2026). Yet Central Asia received relatively limited attention in the global critical minerals debate until recently. The COVID-19 pandemic, Russia's war against Ukraine and China's dominant position in the processing and refining of many critical minerals have contributed to renewed interest in the region among competing global powers (Qoraboyev, 2024). For Kazakhstan, this shift creates opportunities to attract investment, technology and new international partners. It also raises a broader question: to what extent can critical minerals contribute to economic transformation and greater geopolitical agency, rather than reproduce the resource dependence that has long shaped the country's development?

While market demand and geopolitical considerations are important for understanding critical minerals, it is equally important to examine how they are represented through language. These

representations shape how their significance is understood, which interests they are expected to serve and which forms of resource development are considered desirable. Official statements and media coverage are therefore important sites where the political and economic meaning of mineral wealth is constructed and reinforced (Vivoda et al., 2026). When minerals are framed in terms of national security, sovereignty, resource independence or the green transition, their extraction and processing become linked to broader national objectives. Such narratives can legitimise particular development priorities while leaving other questions, including the distribution of benefits and the consequences of extraction, less visible.

Recent research suggests that critical mineral narratives vary according to countries' positions in the global economic hierarchy. Analysing media coverage across 16 countries, Liu and Downey (2026) find that "core" countries increasingly frame critical minerals through geopolitical competition and resource security, while "semi-peripheral" countries place greater emphasis on sovereignty, industrial development and economic modernisation. In "peripheral" countries, coverage more often addresses state control, domestic governance and conflicts surrounding extraction. These differences reflect the distinct political and economic concerns associated with countries' positions in the global economy. At the same time, the growing prominence of protectionism and "securitization" of resources among all these contexts challenges once dominant assumption that access to strategic materials can be left primarily to markets and private supply chains. These insights provide a starting point for examining how Kazakhstan's critical minerals discourse connects international positioning with domestic development ambitions.

These debates are particularly relevant to Kazakhstan, where the pursuit of economic modernisation intersects with a longstanding effort to maintain room for manoeuvre among competing external powers. Critical minerals are increasingly presented as an opportunity to advance both objectives: attracting foreign investment and expertise to support industrial development, while strengthening the country's international position through cooperation with multiple partners. However, diversification does not necessarily amount to strategic autonomy, nor does greater state involvement in strategically important resources necessarily imply resource nationalism directed against foreign states or multinational corporations. Kazakhstan's approach can instead be understood as an attempt to expand its options while continuing to rely on foreign capital, technology and access to international markets. Whether this approach will translate into greater domestic control over value chains and tangible economic benefits remains an open question.

This uncertainty is central to debates on extractivism. A resource-based development strategy can incorporate new technologies, additional international partners and expanded domestic processing without fundamentally changing the economic relationships through which resources are extracted and their value distributed. Greater international visibility and new investment may create opportunities, but they do not in themselves establish who ultimately benefits from resource development or who bears its environmental and social costs. Resource politics scholarship emphasises that natural resources are not merely material assets but are also embedded in political struggles over sovereignty, power and justice (Laurens, 2025; Liu & Downey, 2026).

Despite the growing policy relevance of critical minerals in Kazakhstan, limited attention has been paid to how they are framed in domestic media and official discourse. Drawing on framing theory, this paper tries to fill the gap and asks **h**ow critical minerals are framed in Kazakhstan, and what these frames reveal about the relationship between geopolitical diversification, economic development and the prospects for transforming the country's resource-based development model. The analysis identifies two dominant frames: geopolitical diversification and economic development. The

first presents critical minerals as an opportunity to strengthen Kazakhstan's position among competing international partners and diversify its external relations. The second emphasises their potential to attract investment and technology, expand domestic processing and move towards higher-value production. The paper argues that these frames are mutually reinforcing. Yet the prominence of these ambitions does not establish that they will be realised, or that they will fundamentally alter Kazakhstan's resource-based development model.

The findings also point to an asymmetry between the prominence of critical minerals in government discourse and their more limited presence in broader domestic media debate. Coverage foregrounds international partnerships, investment and industrial development, while giving comparatively less attention to implementation, environmental impacts and the distribution of the benefits and costs of extraction. This does not demonstrate that the promised benefits have failed to materialise. Rather, it highlights the limited attention paid to the conditions under which these promises might be fulfilled and to the wider consequences of the development pathways being promoted.

The paper argues that Kazakhstan's emerging critical minerals agenda illustrates the limits of treating geopolitical diversification as synonymous with economic transformation. New partnerships may expand the country's room for manoeuvre, but they do not automatically reduce structural dependence, secure a more advantageous position within global value chains or ensure a more equitable distribution of resource wealth. By examining both the dominant frames and the issues that receive less attention, this study contributes to debates on resource governance, geopolitical competition and extractivism. It also raises a broader question: under what conditions can the growing strategic value of natural resources support durable domestic development and a more just transition, rather than renew the promises associated with resource wealth?

The paper is structured as follows: the first part of the literature review provides an overview of critical minerals, outlining the key complexities and debates around the topic, as well as the current state of their development globally. The second section reviews the literature on knowledge and narrative production in the critical minerals debate, with particular attention to the role of media in shaping them. The paper then presents the research methodology and theoretical framework, followed by research results, discussion, and a conclusion.

Literature review

Geopolitics of Critical Minerals

Representing around three-quarters of greenhouse gas emissions, the energy sector is also often presented as one of the solutions to averting the climate change consequences. The quest for such a transition has been concretized in national policy packages and proposals of multiple "New Green Deals" (Almeida et al., 2023). The technological pathways for decarbonization however require more minerals than conventional fossil fuel-based systems. Such transformations, along with military technologies and artificial intelligence (AI), depend and rely on a number of selected minerals. These commodities include but are not limited to cobalt, lithium, copper, graphite, nickel, and rare earth elements (commonly referred to as the "big six") (Victor et al., 2024).

The vocabulary used to describe these minerals is often quite vague and varies from source to source. Transition, green, critical, strategic, conflict. Nonetheless, to date, the term most widely used is "critical", referring to minerals that are significant for modern economies and susceptible to supply

risks (Heffron, 2020; Reich & Simon, 2025). It is important to note however that mineral criticality is a subjective concept that evolves over time depending on perceptions of risk and changing national and industrial policies (Hayes & McCullough, 2018; Middleton et al., 2026). Each criticality paradigm is hence context-and-country specific, with multiple methodologies, periodic assessments and updates (Zhang, 2026). For example, the European Union's (EU) list of critical raw materials (CRM) comprises 34 elements that are defined as materials of high economic importance to the EU economy and of high risk associated with their supply (European Commission, 2023). In the United States (U.S.), critical minerals are those that are essential for U.S. national or economic security (Vivoda et al., 2025). To be considered "critical," there must also be a risk that the country will not be able to obtain a mineral in the necessary quantities (Vivoda et al., 2025). Various lists have been created in different countries and despite slight differences in formulations, the underlying challenges and objectives remain similar. Generally, publicly available criticality lists are those of a small part of the global population (Hayes & McCullough, 2018).

With the global transition to renewable energy gathering pace, overall demand for minerals is expected to almost triple by the end of the decade (International Energy Agency [IEA], 2024). According to other estimations from the International Energy Agency (IEA) and the World Bank, there will be a need to boost the production of lithium and graphite fivefold by 2050 compared to current production levels to reach the Paris Agreement's temperature objectives (assuming unrevised manufacturing technology) (Zhang, 2026). To complicate matters further, given the dual-use nature of many critical minerals (essential for defense and civilian purposes) and the confidential nature of many military technologies, the accurate demand seems rather ambiguous (Vivoda et al., 2025). Projections differ from one source to another, yet all indicate the growing gap between rising demand and minimally diversified supply. Equally crucial is recognizing that the energy transition depends as much on the economic conditions for mobilizing resources as on their physical existence.

Overall, the value chains and the life cycle of the critical minerals (from extraction and refining to the point of disposal of electronic waste) required to drive the energy transition are complex, with high degree of market concentration (Okolo, 2026; Zhang, 2026). To illustrate the matter, the Democratic Republic of Congo (DRC) accounts for more than 60 per cent of global cobalt production, while China dominates natural graphite and rare earth element supply, accounting for around 70 and 85 per cent, respectively (Zhang, 2026). Chile and Indonesia are also major producers of nickel and copper, while Australia, Argentina, Bolivia and Chile hold a large share of global lithium reserves (Zhang, 2026).

Amid the escalating global tensions, the previous dynamics of competition for resources have accelerated. In the short to medium term, such concentration with the increasing demand for selected materials could lead to supply shortages and related risks. From the broader U.S. and Western perspective, China's upper hand in the mining, processing, and supply chains generates major dependencies on a geopolitical rival. So, on one hand, there are countries that have found themselves increasingly dependent on foreign sources for essential minerals after decades of outsourcing, now seeking to diversify and secure access to mineral deposits and supply chains (Okolo, 2026). At the same time, there is the proliferation of export restrictions and controls with new mineral tariff codes. This way, major players in global competition to secure access to critical minerals – the U.S., Europe and China – are all trying to increase domestic mining, invest in countries where resources are concentrated, and diversify origins of imports (Baldassarre & Carrara, 2025; Heggelund et al., 2026).

Offering a solution to sustainability and security considerations, energy transition with critical minerals at its core encompass profound challenges and paradoxes. Under the premise of tackling the

effects of climate change, there are serious environmental, social, health, and economic impacts of mining, which might aggravate or even create new adverse outcomes for communities and biodiversity. Moreover, a significant share of these resources and extraction projects are found within indigenous land and in developing economies (Adam et al., 2026; Malin et al., 2019). Often bearing the cost of the policies and solutions seeking "green and just" transition, such places are sometimes referred to as "green sacrifice zones" - places exploited in the name of sustainability (Middleton et al., 2026; Walter et al., 2025; Zografos & Robbins, 2020). For example, the area called the Lithium Triangle, lying among Argentina, Bolivia, and Chile, holds more than half of the world's lithium reserves (Zografos & Robbins, 2020). This is also one of the driest places in the world, which currently experiences serious water stress as a result of mining (Zografos & Robbins, 2020). Similarly, in the DRC the cobalt mining region is considered one of the ten most polluted places on the planet and entire communities are exposed to dangerous working conditions, human rights abuses, toxic pollution, and violence (Heffron, 2020; Zografos & Robbins, 2020). Contributing to extensive child labour and financing of armed groups, cobalt extraction has cost millions of lives (Zografos & Robbins, 2020). Hence, striking a delicate balance between competing priorities of security, cost, and sustainability – a dynamic known as the "minerals trilemma" – is crucial (Laurens, 2025; Vivoda, 2025).

When it comes to resource-rich countries, many works draw on the literature on the resource curse, particularly work on Dutch disease, rent-seeking, economic volatility, and weak institutions, examining how the energy transition could reproduce forms of extractive dependence (Kim & al., 2026; Malin et al., 2019). However, the issue goes beyond the environmental and social impacts of mining described above with implications for resource-rich countries to develop processing capacities and retain more of the economic benefits associated with learning, employment, and technological development. From this perspective, Kim & al. (2026) suggest that "criticality" should be considered not only in terms of supply risks for importing countries, but also in terms of the development opportunities and challenges faced by exporting states. The key question is therefore whether mineral wealth can contribute to economic diversification, decent employment, and lower inequality (Kim & al., 2026; Meirkhanova, 2025).

In addition, the "race" between the industrial countries is reconfiguring power relations and development finance models. For instance, the recent U.S.-Ukraine "mineral deal" in exchange for military aid and investment in the country's reconstruction underscores weaponization of aid and resource access in the strategic considerations of a few powerful nations and corporations (Shaffer & Puig, 2025). Thus, the exporting countries may be forced into often unfavorable deals balancing between leverages and liabilities (Baskaran, 2025; Okolo, 2026; Zhang, 2026; Zografos & Robbins, 2020). In the similar vein, China's overseas development assistance projects linked to access to raw materials and the EU's "Global Gateway" with packaged mineral deals might contribute to and reproduce these dynamics (Hunduza, 2026; Mbate, 2025). Finally, what is important to note is that devising national strategies in this regard are often not multilateral in scope, reinforcing fragmentation and feeding into a zero-sum dynamic.

Media

The critical minerals debate is marked by a wide array of information asymmetries and conflicting frames. In part, this might be related to the complexity of the field, which brings together geology, environmental issues, finance, the energy transition, national security, and technological development (Vivoda et al., 2026). The technical nature of these questions can make them difficult for

the wider public, and sometimes even policymakers, to assess, leaving room for distortion and misinterpretation (Vivoda et al., 2026). The frequent confusion of using "rare earths" as a general term for different types of critical minerals is one example (Vivoda et al., 2026).

However, not all differences in how critical minerals are discussed can be explained by a lack of knowledge or simple mistakes. By emphasizing certain aspects of an issue and downplaying others, as well as through the language and the position of the actor presenting it, these narratives can shape how problems and possible solutions are understood and interpreted (Vivoda et al., 2026). For instance, different ways of presenting the same mining project can attach very different meanings to it: a mine can be described as a sign of national development or as an example of foreign exploitation (Vivoda et al., 2026). Similar dynamics can be seen in debates around mining projects and related environmental/social conflicts. Scientific assessments, claims to expertise, certification standards, and public participation can all be used to support particular positions, meaning that the production and contestation of environmental knowledge is also shaped by power relations (Middleton et al., 2026). This also extends to geopolitical disinformation deployed to advance one's geopolitical objectives. This makes control over how minerals are discussed important alongside control over the resources themselves (Middleton et al., 2026; Vivoda et al., 2026). Governments, companies and local communities all take part in constructing and shaping these narratives, although from different positions and at different levels.

The energy transition and critical minerals debate is often closely linked to the EU's "Green Deal", providing a useful case for examining media framing and the directive effects of political language on audiences. The European Commission largely presents the weaponization of energy, existing dependencies and competition with China as major threats and reasons to accelerate the transition (Almeida et al., 2023; Dubský & Zemanová, 2026). This framing also supports the EU's self-defined role as a moral "intervener" and standard-setter, strengthening its influence over markets and the direction of the transition itself (Almeida et al., 2023). By defining what constitutes a common good, a threat, and an appropriate solution, the EU, as the "world's most ecologically distinguished", presents its approach as a model for others, while giving little attention to the historical, colonial and capitalist structures behind current environmental crises (Almeida et al., 2023). The urgency of the transition can consequently become accepted as common sense, while complex ecological problems are framed as technical problems with identifiable solutions (Dubský & Zemanová, 2026). Such framing can make environmental challenges more compatible with existing economic structures rather than requiring deeper changes. The extent to which these narratives correspond with material changes is therefore important for understanding how the transition advances.

Moreover, attaching a constructed political term of "critical" to these minerals turns them into a matter of a collective concern and supports a shift towards "securitization", urgency, and perceived existential threat (Middleton et al., 2026; Vivoda et al., 2026). This framing can, in turn, reinforce the interests of extractive actors by legitimizing greater extraction, weakening trade and environmental constraints, and maintaining existing power imbalances within the green transition (Middleton et al., 2026; Vivoda et al., 2026).

This logic is often expressed through terms such as "race", "rush", and "scramble", presenting mineral extraction as an urgent and essential response in the name of saving the planet (Middleton et al., 2026; Vivoda et al., 2026). Such language might create and amplify narratives of scarcity and competition. These dynamics are particularly visible in media coverage of the Arctic, where resource extraction is often discussed alongside broader geopolitical interests of other countries (Middleton et al., 2026). The region is also often portrayed as an empty and distant resource frontier, an "expanse of

ice and rock", which can create a perception that it exists outside any rules and scrutiny, distancing extraction from the people and ecosystems affected by it (Almeida et al., 2023). At the same time, the Arctic is largely represented through its economic and strategic value, with "sovereignty" and "resource independence" forming recurring themes (Almeida et al., 2023; Middleton et al., 2026). Indigenous and decolonial perspectives however receive considerably less attention in these portrayals (Almeida et al., 2023; Middleton et al., 2026). Finally, all these framings link mineral security to the preservation of the geopolitical position of the U.S. and its allies, rather than to international institutions and trade norms (Vivoda et al., 2026).

Besides, the terms "critical minerals" and "energy transition minerals" are often used interchangeably, which can give the impression that demand for these minerals is primarily driven by climate and energy transition policies (Almeida et al., 2023). However, for many of these commodities, energy technologies account for less than half of demand (Almeida et al., 2023). Defense, digital technologies, AI, and other industrial sectors also account for substantial demand, but their role is often less visible in public and media discussions (Almeida et al., 2023; Middleton et al., 2026).

Finally, the media often highlights projections of rapidly rising demand and potential supply shortages, which can create the collective impression that mineral supplies are running out or that much greater extraction is needed to sustain and achieve the transition. When presented without sufficient explanations of their assumptions and uncertainties, both intentional or not, such projections can reinforce narratives of rarity and scarcity and, in turn, strengthen the perceived need for a "rush" to increase production. With climate change becoming more urgent and governments facing competing budget priorities, it is crucial to ask who produces this knowledge and for what purpose.

Methodology and theoretical framework

News media help shape how political and economic issues are understood by selecting which aspects of an issue to highlight and which to leave less visible (Happer & Philo, 2013; Bennett, 2005). This is particularly relevant to resource-producing countries, where media coverage can contribute to how mining policies and their objectives are presented and legitimised (Vuković et al., 2026). Examining domestic media therefore offers a way to explore how critical minerals are discussed in Kazakhstan and how these discussions relate to the country's foreign policy and economic ambitions.

This study uses qualitative framing analysis informed by discourse analysis. Framing analysis is suited to this question because it examines how an issue is presented, which actors and objectives are foregrounded, and what receives comparatively little attention. The study asks the following questions:

- What frames of critical minerals recur in Kazakhstani news coverage, and which aspects of their development are foregrounded?
- How do these frames relate to Kazakhstan's wider foreign policy and economic development ambitions?

The empirical material consists of 25 articles published in 2025-2026, a period of active critical-minerals diplomacy. The issue had become more visible in Kazakhstan's public discourse from around 2023, following the Kazakhstan-EU Strategic Partnership on Sustainable Raw Materials and the intensification of the C5+1 framework and other international initiatives (Akromov, 2024; Couneau, 2026). Earlier material identified during the research was predominantly academic or policy-oriented rather than news coverage.

Articles were identified through Google searches conducted in summer of 2026 in Kazakh, Russian and English. The search strategy combined terms on critical minerals and related resources

with terms associated with Kazakhstan, mining, processing, international cooperation and supply chains. The search included variations of terms such as “critical minerals”, “critical raw materials”, “strategic minerals”, “rare earth elements”, mining, processing and supply chains, alongside references to Kazakhstan. The searches were conducted in all three languages to capture coverage published for different linguistic audiences.

The sample was selected purposively. Articles were included if they discussed critical minerals or related resources in connection with Kazakhstan’s economic development, international partnerships, industrial policy or geopolitical position. The material includes news reports, interviews and analytical articles, as well as coverage featuring the views of government officials, industry representatives and other stakeholders. Brief announcements and repetitive reports were excluded when they offered little additional context or interpretation. Where several outlets covered the same visit, agreement or investment announcement, priority was given to articles that provided further insight into its significance.

The selected articles came from *The Astana Times, Eurasianet, Orda, Qazinform, Kapital.kz, Informburo, Forbes Kazakhstan, Kursiv, UlysMedia, Kazakhstanskaya Pravda, Tengrinews, BES.media, Vlast* and *DKNews.kz*. The outlets were not systematically classified as state-controlled or independent, as the aim was to identify recurring patterns across the selected material rather than compare editorial categories. The sample is therefore illustrative, not representative of all media coverage of critical minerals in Kazakhstan.

The analysis combined close reading with manual note-taking to identify recurring themes, actors, arguments and patterns of emphasis. Framing theory provided the analytical starting point and the attention was paid to how articles presented the significance of critical minerals and ultimately connected them to particular policy objectives (Chong & Druckman, 2007; Vuković et al., 2026).

The specific frames were identified inductively, rather than defined in advance. The articles were first examined for their main arguments, the actors represented, and the meanings attached to mineral development. Headlines, word choice, evaluative language and references to government policy, businesses and international partners were considered alongside themes such as geopolitical competition, investment, modernisation, domestic processing and higher-value production. Comparing the notes across articles led to the identification of two recurring frames: geopolitical diversification and economic development. The analysis then examined how these frames related to one another and which issues received less attention. This was a qualitative interpretive process, not a formal coding exercise or quantitative measurement of frame frequency.

The primary material consists of media articles, not a separate corpus of government documents. Official discourse is examined as it appears within the coverage, including quotations from officials and reports on policy initiatives, bilateral agreements and investment announcements. The findings therefore concern media representations of these issues, rather than official discourse in its entirety.

Several limitations should be acknowledged. The sample of 25 articles is small and purposively selected; it cannot establish how prevalent the identified frames are across Kazakhstani media. Google searches may have favoured accessible and readily indexed material, and relevant articles may have been missed. The analysis also relies on manual notes rather than a formal coding scheme, so the two frames represent an interpretation of recurring patterns in the selected texts. Finally, the study does not systematically compare media coverage with official policy documents, assess the implementation or economic outcomes of the initiatives discussed, or examine audience reception. It cannot determine whether the benefits presented in the coverage have materialised or how widely these representations

are accepted. Its contribution is narrower: to show how the selected articles connect critical minerals to geopolitical diversification and economic development, and to identify aspects of resource development that receive comparatively less attention.

Results and discussion

The analysis identifies two dominant frames in the selected coverage of critical minerals in Kazakhstan: geopolitical diversification and economic development. The first concerns Kazakhstan's efforts to strengthen its position among international partners and within emerging supply chains. The second addresses whether growing international interest can support domestic processing, technological development and greater retention of economic value. The state's role in managing foreign investment cuts across both frames, while a smaller group of articles raises questions about environmental harm and social accountability. Together, these frames show how critical minerals are presented as an opportunity to strengthen Kazakhstan's international position and move beyond raw-material exports, while leaving open whether these ambitions will lead to a broader transformation of the country's resource-based development model.

Geopolitical diversification

One of the dominant frames concerns the geopolitical significance of critical minerals. It is shaped by Western efforts to diversify supply chains and reduce dependence on China, particularly in the processing and refining of these resources (Gusseinov & Sultonazarov, 2024; Qoraboyev, 2024). Within this context, the selected articles present growing international demand as an opportunity for Kazakhstan to assume a more prominent role in international affairs and the global economy. The focus is not only on the country's mineral wealth, but also on what these resources might allow it to achieve.

In *Kazakhstanskaya Pravda*, Prokhorov (2025) describes the development of Kazakhstan's critical-minerals sector as a "historical chance" to become a "key, indispensable link" in global supply chains. This language presents resource wealth as a basis for a more prominent international role. However, the article frames this position as an opportunity rather than an established reality. Mineral endowment may create potential leverage, but turning it into geopolitical influence depends on Kazakhstan's ability to develop production, processing and commercial relationships that sustain its role in these supply chains. Similarly, in *BES.media*, Tynysh (2026) presents rare earths as a "new window of opportunity" for Kazakhstan, linking them to future economic growth and the energy transition. The window metaphor might suggest a certain timing and that the country's prospects are tied to a period in which demand for critical minerals is rising and external partners are seeking to diversify their supplies. This framing lends urgency to the issue, yet the opportunity is not guaranteed to last.

Coverage of relations with the EU similarly presents Kazakhstan's international relevance in terms of its potential contribution to supply-chain diversification. *Tengrinews.kz* reports President Tokayev's statement that Kazakhstan is ready to supply 21 of the 34 critical raw materials on the EU's list. Brynyuk's (2026) article in *Astana TV* reports a similar claim, while *Kursiv* (2026) presents Kazakhstan as ready to replace China in supplying critical minerals to the U.S. These headlines position Kazakhstan as a potential partner for economies seeking alternative sources of supply. The articles therefore connect resource availability with international importance, while the production and commercial conditions needed to sustain this role remain less clear.

Nevertheless, these narratives do not imply exclusive alignment with one side of the geopolitical competition. China remains an important economic partner and is already embedded in the region's critical-minerals economy (Qoraboyev, 2024). Rather than replacing Chinese involvement, Kazakhstan's approach is consistent with its established multivector foreign policy, which seeks to maintain relations with multiple external actors while broadening cooperation with other partners (Kassenova, 2026; Meirkhanova, 2025; Qoraboyev, 2024). This includes countries such as Türkiye, the United Arab Emirates and Singapore (Kassenova, 2026). The critical-minerals agenda thus offers another area in which Astana can broaden its partnerships while retaining room for manoeuvre in an increasingly difficult international environment.

This way, the geopolitical frame presents critical minerals as a means of strengthening Kazakhstan's position among external partners. Yet diversification does not necessarily translate into greater strategic autonomy. Additional partnerships may widen the country's diplomatic options without reducing its dependence on foreign technology, processing capacity or access to external markets. The selected articles establish the importance of this ambition in public discourse, but do not demonstrate that the anticipated shift in Kazakhstan's international position has already taken place.

Economic development

The second framing connects minerals to economic development and upgrading. Critical minerals have become part of the government's broader agenda of attracting investment, expanding geological exploration, developing processing capacity and retaining a larger share of production within Kazakhstan (AIFC, 2024; Brynyuk, 2026; Kalra et al., 2026; Kapital.kz, 2026). Shifting the focus from solely increasing exports, the government officials increasingly present the sector as an opportunity to develop local production and processing capacity, attract new technologies, train specialized workers and strengthen domestic scientific and industrial capacity (Kazakhstan Today, 2026). Overall, the mining sector is being increasingly linked to Kazakhstan's international position and competitiveness, with critical minerals being attached to a broader effort to move beyond a model centered on the extraction and export of raw materials. (Drobny, 2026; Mamyshev, 2025; Svirid, 2026; Tengrinews.kz, 2026).

This ambition is reflected in Kazakhstan's efforts to build partnerships with a range of external actors, including the EU, the U.S., the United Kingdom, South Korea and Japan. As it was mentioned above, media coverage frequently refers to Kazakhstan's readiness and capacity to supply 21 of the 34 critical raw materials on the EU's list and 20 of the 60 minerals identified by the U.S. Geological Survey (Aubakirov & Meirkhanova, 2026; Brynyuk, 2026; Kalra et al., 2026; Kapital.kz, 2026; Polishchuk et al., 2026). These figures are often used to demonstrate the scale of Kazakhstan's resource base and its potential role in today's critical mineral supply chains. Tokayev's description of critical minerals as the "new oil" captures the developmental logic behind this agenda, where mineral resources are presented as a means of attracting capital and technology and strengthening Kazakhstan's position in global value chains (Qoraboyev, 2024).

The result is a pragmatic "investment and technology in exchange for access to strategic resources" approach outlined by the President (Tengrinews.kz, 2026). Much of the official and media discussion consequently focuses on Kazakhstan's reserves, production potential and position compared to other mineral-producing countries. The underlying question, however, is how these advantages can bring longer-term economic gains rather than remain largely comparative advantages on paper. Government statements often refer to leadership in critical mineral supply chains, but the extent to which these ambitions are translated into new processing capacity, technology transfer and higher-

value production remains less clear (Kapital.kz, 2026; Mamyshev, 2025; Prokhorov, 2025; Toleuova, 2025).

The investment narrative is also reflected in how Kazakhstan is presented as a mining jurisdiction. Foreign industry professionals highlight its "very underexplored" geological potential, sparsely populated territory, public acceptance of mining and investor protections as advantages (Nussupova, 2025). At the same time, frequent changes to legislation and taxation, alongside concerns about corruption, are seen as constraints (Nussupova, 2025). What is interesting is that some of the same characteristics of the country – be it its geographical position, political and economy (in)stability, and regulatory environment legislation – can be presented either as advantages or as potential risks, depending on the source and the perspective from which they are discussed (Prokhorov, 2025). Looking at the domestic discourse alongside these external representations allows for a more nuanced picture of how Kazakhstan's mineral potential is understood and what different actors expect from its development.

Finally, the economic agenda has been accompanied by measures aimed at attracting private investment, improving the investment climate and reducing administrative barriers in the mining sector (Eurasianet, 2026; Meirkhanova, 2025; Nosko, 2026; Nussupova, 2025; Zhiyenbayev, 2025). Foreign companies are seen as useful partners because they can take on some of the risks associated with exploration, while Kazakhstan can benefit from investment, employment and the development of new deposits (Drobny, 2026). At the same time, some authors point out that foreign investors are primarily interested in access to raw materials rather than deeper processing or local value creation (Svirid, 2026). Foreign investment could thus support the development of the sector without necessarily changing its extraction-oriented structure.

The role of the state in resource management

Attracting foreign companies does not, however, mean that the state is withdrawing from the sector. Critical minerals are increasingly treated as strategic resources, while the government retains substantial control over licensing and access to subsoil resources (Kurmanov, 2026; Thompson, 2026). Kazakhstan is therefore seeking to attract foreign capital while retaining the ability to determine who can access strategic deposits and under what conditions (Kurmanov, 2026; OECD, 2018; Thompson, 2026; World Bank, 2023). Recent changes to the rules governing subsoil use, which remove the competitive first-come, first-served model and restore the state's role in granting priority rights to strategic investors, further strengthen this role.

As demand for minerals grows, states are nowadays seeking not only to attract investment but also to retain greater control over strategically important resources and strengthen their position in global supply chains (Liu & Downey, 2026). Kazakhstan's critical minerals policy reflects this combination and can be understood as part of a broader resurgence of resource nationalism. The state seeks foreign capital, technology and expertise, but at the same time maintains control over access to resources that it considers strategically important.

This approach also fits a broader pattern in Kazakhstan's environmental policy. Earlier studies of the country's climate and energy discourse show that economic modernization and environmental issues have often been presented as compatible rather than competing priorities (Poberezhskaya & Bychkova, 2022). Fossil fuels have remained central to economic development and national pride and power, while environmental measures have tended to receive greater political support when they could also produce economic benefits (Kudaibergenova, 2015; Poberezhskaya & Bychkova, 2022). A similar logic can be seen in the emerging critical minerals discourse. Consequently, critical minerals are

presented as an opportunity to attract investment, strengthen Kazakhstan's position in international markets and connect the country to the global energy transition, while continued reliance on fossil fuels and extractive industries remains largely unquestioned. The critical minerals agenda may thus introduce new technologies, partners and markets without necessarily changing the underlying model of development, where new economic opportunities take priority over the environmental goals.

Another common thread in the media coverage and official discourse is the presentation of Kazakhstan as a "stable" and "reliable" partner in the critical mineral economy (Tengrinews.kz, 2026; Zhanibekov, 2026). This positioning extends beyond mining. The same study of Kazakhstan's climate and sustainable-development discourse demonstrates how the state presents itself domestically as capable and internationally as a responsible and cooperative partner (Poberezhskaya & Bychkova, 2022). At the same time, the image of a "strong state" coexists with continued reliance on foreign investment, expertise and external support (Poberezhskaya & Bychkova, 2022). Kazakhstan is thus positioned both as the owner of strategically important resources and as a state capable of managing their development, while also presenting international cooperation as necessary for achieving its economic and environmental goals. In this sense, the critical minerals discourse reinforces this dual positioning by allowing Kazakhstan to present its resources as strategically valuable while using growing international demand to attract foreign capital, technology and expertise.

Environmental and social concerns

What is less prominent is discussion of the conditions under which this expansion would occur. Environmental impacts, water use, labour conditions and the distribution of mining-related benefits and costs receive considerably less attention than reserves, investment and processing. Water scarcity, for example, is more often discussed as an agricultural problem than as a constraint of mining (Thompson, 2026). Labour and safety concerns likewise remain peripheral to the dominant investment narrative. Recent reporting on mining-related accidents and limited judicial follow-up raises questions about corporate accountability that are not easily reconciled with the simultaneous promotion of Kazakhstan as a reliable mining partner (Yerkassynov, 2026). The lack of discussion of environmental and labour costs can also suggest that a substantial part of the visible discourse is directed toward international partners, investors and governments.

Environmental concerns are not entirely absent, however. Drobny's (2026) article in *Ulysmedia* explicitly considers the environmental factor in rare-earth processing and discusses the trade-offs involved in developing domestic capacity. The article highlights that expanding processing in Kazakhstan is not simply a question of attracting investment, but also involves technological and environmental challenges. This suggests that environmental concerns appear more clearly in some analytical coverage than in reports focused on official announcements and international agreements. They remain less central, however, to the dominant narratives about Kazakhstan's strategic position and economic potential.

Labour conditions and corporate accountability receive more direct attention only in Yerkassynov's (2026) article in *Vlast*, *Extractive Industry Tied to "Serious" Abuses in Kazakhstan - Report*. Drawing on a report on business and human rights, the article discusses allegations of labour and human-rights abuses in the extractive sector, including concerns about mining projects described as "strategic" but "lacking transparency and human-rights safeguards". The article also raises questions about accountability in a sector where the promotion of further extraction ("push for more extraction") may not be accompanied by sufficient protections for workers (with a system of "repressive legislation"). This perspective contrasts with the portrayal of Kazakhstan as a reliable mining partner

and highlights concerns that are less visible in investment-focused coverage. This "imbalance" may partly reflect who the discourse is aimed at. Critical minerals are discussed mainly by government officials, industry actors and at international-policy levels, where the immediate concerns are investment, technology, market access and supply security.

There is also a gap between the prominence of the critical minerals at the state level and their place in domestic policy discourse. The issue now features in high-level discussions of economic development and international cooperation, with foreign partners invited to participate in "developing Kazakhstan's mineral potential" (Tynysh, 2026). Yet Maria Lobachyova, program director of the NGO Echo, notes that their work encountered limited understanding in Kazakhstan of what critical minerals are (Tynysh, 2026). This might suggest that the debate has developed more rapidly within international and governmental agendas than in broader domestic discourse. This may also help explain the limited media discussion beyond announcements of new deals, investments and mineral discoveries.

Conclusion

This study's findings show that critical minerals are framed in Kazakhstan through the interaction of external geopolitical demand and domestic development priorities. The geopolitical frame presents them as an opportunity to diversify international partnerships and strengthen Kazakhstan's position in global supply chains. The economic-development frame links the same resources to investment, processing, technology transfer and the possibility of retaining more value domestically. The state's role connects these ambitions, as Kazakhstan seeks foreign capital and expertise while maintaining control over access to strategic resources.

However, the selected coverage leaves open whether these ambitions will change the country's resource-based development model. Greater international interest does not necessarily translate into greater strategic autonomy, just as foreign investment does not automatically lead to domestic technological upgrading. Meanwhile, environmental and social concerns remain less prominent than investment, production and international positioning. Although some articles address environmental risks and labour accountability, these issues do not occupy the same place in the dominant narratives. The findings thus point to a broader question: what kind of development is being pursued through Kazakhstan's critical-minerals agenda? If critical minerals are to support economic transformation rather than reproduce an extractive model, attention needs to extend beyond investment, production and access to international markets.

First, economic gains cannot be separated from the costs of extraction. Mining projects should account for remediation and closure from the outset, rather than treating environmental restoration as a problem to be addressed once extraction ends. The costs of closure, land rehabilitation and end-of-life management should therefore be incorporated into project planning and financing (Zhang, 2026). Second, justice also needs to be considered beyond the distribution of economic benefits. The effects of extraction are unevenly experienced and will vary across regions and communities, making a case-by-case approach necessary. Where projects affect land and livelihoods, this may require meaningful consultation, access to information and stronger mechanisms for community consent. Elsewhere, the priority may be ensuring that local benefits extend beyond the short-term employment generated during a mine development. Such measures need to be built into critical mineral projects from the outset, rather than introduced after social conflict or environmental damage has occurred. Finally, the expansion of critical mineral extraction and production should not be treated as the only response to growing demand. Reducing material consumption, increasing recycling and developing a circular

economy can lower pressure for new extraction, although they will not eliminate the need for mining altogether (Ferreira & Odell, 2026). The remaining extraction therefore needs to be governed by stronger environmental and social standards (Ferreira & Odell, 2026; Zhang, 2026).

For Kazakhstan, this means that the question is not simply how to become a larger supplier of critical minerals. It is whether the current international attention can be used to build a less dependent and more diversified economy without reproducing the environmental and social costs associated with earlier forms of extractive development in the oil and gas sector. The transition to a critical-minerals economy will not, by itself, constitute a transition away from extractivism. That outcome depends on how resources are governed, where value is captured, and whose interests shape the terms of development.

Critical minerals are being discussed within a wider economic system shaped by pressures for accumulation, continued consumption and competition over access to resources. These dynamics can produce uneven forms of development, in which the environmental and social costs of extraction are concentrated in particular places while the higher-value stages of production and consumption occur elsewhere. From this perspective, the question for Kazakhstan is not only how to capture more value from mineral extraction, but also what level of extraction is necessary, for which forms of development, and who ultimately benefits from it. This opens space for a broader debate around resource efficiency, reduced material demand, recycling and, more fundamentally, the limits of an economic model that treats nature primarily as a source of commodities.

Such a perspective also complicates the idea of a global “race” for critical minerals. If states respond to supply insecurity by competing for access to deposits and investment, the result may be greater fragmentation rather than more resilient supply chains. An alternative would be to treat critical minerals as an area for cooperation, through greater transparency in supply chains, technology sharing, recycling, coordinated environmental standards and forms of value creation that do not simply shift the costs of extraction onto resource-producing countries. For Kazakhstan, this could mean using its position in emerging critical mineral supply chains not only to attract investment, but also to question the terms on which that investment takes place and the kind of development it is intended to support.

This way, future research may focus on analyzing informal and alternative methods of public participation and scrutiny of important projects related to resource extraction and development in order to complement the existing mechanisms and identify how and when society can be involved to ensure and enhance collaboration, transparency and actual mutual benefits.

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ҒТАМР: 19.45.91

Қазақстанның стратегиялық маңызы бар минералдарын фреймдеу: жергілікті БАҚ-тағы дискурс

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Аңдатпа

Стратегиялық маңызы бар минералдар үшін бәсекелестік күшейген сайын, Қазақстан ресурстық қауіпсіздік және жеткізу тізбектерін әртараптандыру жөніндегі пікірталастарда көбірек назарға ілінуде. Халықаралық дискурста Қазақстан көп жағдайда Қытайға балама немесе геосаяси бәсекелестіктің ықтимал жаңа алаңы ретінде қарастырылады. Бұл мақала аталған пікірталастың салыстырмалы түрде аз зерттелген қырын қарастырып, қазақстандық медиада стратегиялық маңызы бар минералдар тақырыбының қалай талқыланатынын және бұл пайымдаулар елдің даму жөніндегі ұмтылыстары туралы нені аңғартатынын зерттейді. Фрейминг теориясына сүйене отырып, зерттеу екі негізгі фреймді анықтайды: геосаяси әртараптандыру және экономикалық даму. Бірінші фрейм стратегиялық маңызы бар минералдарды Қазақстан үшін халықаралық әріптестікті кеңейтуге және қалыптасқан көпвекторлы сыртқы саясаты арқылы халықаралық қатынастардағы тиімді әрекет ету жолдарын арттыруға жол ашатын мүмкіндік ретінде көрсетеді. Екінші фрейм оларды инвестициялар тарту мен экономикалық өсудің маңызды көзі ретінде қарастырады. Екі фреймде де негізгі назар пайдалы қазбалар қорына, өндіру әлеуетіне және инвестициялық мәмілелерге аударылады. Аталған зерттеу ресми мақсаттар мен олардың іс жүзінде жүзеге асу ықтималдықтарына бөлінетін шектеулі назар арасындағы алшақтықты көрсетеді. Қазақстандық БАҚ әлеуметтік және экологиялық салдарларға, сондай-ақ өндіруден туындайтын шығындар мен пайданың бөлінуіне аз көңіл бөледі. Зерттеу барысында стратегиялық маңызы бар минералдарды энергетикалық транзит және қорғаныс салаларымен байланыстыратын фреймдер анықталмады. Зерттеу нәтижелері отандық медиа дискурстың стратегиялық маңызы бар минералдарды геосаяси ықпал ету тетігі мен экономикалық мүмкіндіктер көзі ретінде қарастыратын мемлекеттік көзқарасты қайталайтынын көрсетеді. Бұл ретте ресурстарға негізделген дамудың шарттары мен салдары жеткілікті деңгейде толық зерттелмейді. Қазақстанның стратегиялық маңызы бар пайдалы қазбаларды жеткізуші ел ретінде қалыптасуы өздігінен экстрактивизмнен бас тартуды білдірмейді. Оның салдары ресурстардың қалай басқарылатынына, қосылған құнның қай жерде қалыптасатынына және даму үдерісінің бағытын кімдердің мүдделері айқындайтынына байланысты.

Кілт сөздер: стратегиялық маңызы бар минералдар, энергетикалық транзит, өндіруші сектор, Қазақстан, фрейминг теориясы, көпвекторлы саясат.

МРНТИ: 19.45.91

Фрейминг критически важных минералов Казахстана: формирующийся дискурс в местных СМИ

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Аннотация

На фоне обострения конкуренции за критически важные минеральные ресурсы Казахстан привлекает всё больше внимания в дискуссиях о ресурсной безопасности и диверсификации цепочек поставок. В международном дискурсе страну часто представляют как альтернативу Китаю или как потенциальную арену геополитического соперничества. Данная статья рассматривает относительно малоизученный аспект этой дискуссии: как критически важные минеральные ресурсы представлены в казахстанских СМИ и что эти репрезентации говорят об амбициях страны в сфере развития. Опираясь на теорию фрейминга, исследование выделяет два доминирующих фрейма: геополитическую диверсификацию и экономическое развитие. Первый представляет критически важные минеральные ресурсы как возможность для Казахстана расширить круг международных партнёров и укрепить свободу манёвра в рамках сложившейся многовекторной внешней политики. Второй рассматривает их как важный источник инвестиций и экономического роста. В обоих фреймах основное внимание уделяется запасам полезных ископаемых, производственному потенциалу и инвестиционным сделкам. Анализ выявляет разрыв между официальными амбициями и ограниченным вниманием к тому, как они могут быть реализованы на практике. При этом социально-экологические последствия, а также распределение издержек и выгод, связанных с добычей, освещаются значительно реже. Фреймы, связывающие эти ресурсы с энергетическим переходом и оборонной сферой, также отсутствуют. Результаты показывают, что отечественный медиадискурс преимущественно воспроизводит ориентированное на государство представление о критически важных минеральных ресурсах как источнике геополитического влияния и экономических возможностей, оставляя условия и последствия развития, основанного на эксплуатации природных ресурсов, недостаточно изученными. Наконец, превращение Казахстана в поставщика критически важных минеральных ресурсов само по себе не означает отхода от экстрактивизма: последствия этого процесса зависят от принципов управления ресурсами, от того, где формируется добавленная стоимость и чьи интересы определяют направление развития.

Ключевые слова: критически важные минералы, энергетический переход, добывающий сектор, Казахстан, теория фрейминга, многовекторность.

Received: September 2, 2026
Accepted: September 28, 2026