

Resolutions and Consequences: A Look Ahead to the Geopolitical Landscape of 2025

written by Melissa (Mel) Sanderson | December 31, 2024

'Tis the time in which many of us look toward the New Year with intentionality and purpose and resolve to achieve certain goals and objectives. Nations are no different, and with 2025 looming it seems a good time to consider what might be in store for global outlooks.

Brazil is marching full speed ahead on developing its critical mineral resources, smoothing the way for international investors and mining companies with expedited permitting and financial incentives both at the federal and state levels. It is working to further develop infrastructure in areas needing improvement and is aggressively soliciting value-add opportunities in processing and metal production.

Russia continues to use primarily military measures to obtain access to what its economy needs to not only survive but develop. Its inroads on the African continent are deep in West Africa and broadening throughout the continent including in key mineral jurisdictions such as the DRC, which hosts some of the richest grade and largest volume deposits of a variety of critical minerals needed by Western nations and used both for civilian and military applications. Less often spoken of is Russia's continuing influence and access in former Soviet Bloc nations such as Tajikistan and especially Kazakhstan, whose known mineral resources come close to rivaling those of the DRC.

India, whose fortunes seem continuously to fluctuate, is

striving to advance. Like Brazil, it is focused on developing the infrastructure necessary for economic activities such as mining. It is politically outward looking, seeking broader alliances with key mining nations such as Canada and Australia, as well as the US, Japan and Russia. It's complex internal political rivalries, however, continue to present impediments to rapid development of its considerable resources.

China, of course, has a consistent annual resolution – to secure its standing as a globally dominant economic powerhouse – and it continues to work toward that objective. Although arguably its influence has diminished slightly overall in Africa, where most national governments prefer other partners when possible, it remains a dominant player in the DRC's treasure chest. Its influence and presence is increasing in Latin America and it is pushing its own internal resources to further rapid development. Its increasingly militaristic stance in the East China Sea and political interference in Hong Kong, Malaysia and elsewhere are a result of its determination to secure its perceived sphere of influence. While Western attention is focused heavily on Taiwan, China continues to advance its interests in nations like Vietnam. The current unprecedented political uproar in South Korea may present new opportunities for China in the region. Confrontation with Washington will continue and likely escalate as the two great economic nations grapple for access to resources.

Saudi Arabia continues to follow the development blueprint of Plan 2030, which already has introduced social and economic changes on a national scale comparable only to China's Great Leap Forward. A new emphasis on mining over oil is underpinned by institutional changes and a search for new partners and different resources. Saudi is sharply focused on critical minerals needed to support other areas of its economic development, including a massive AI center, and already is

investing in processing capability to support its 'materials to metals' strategy. While all eyes are on the China-US/West faceoff, Saudi is resolutely positioning itself to be 'the future economy' that could surprise the world.

So much for the BRICS. Before turning West, however, it's worth mentioning that Kazakhstan is working hard to attract additional investment both to its mining and IT sectors. This huge nation has been hampered in development by its neighbors, China and Russia, and the need to carefully balance relations with both while also courting engagement with the US and EU. The tightrope act is paying off, as Western companies are arriving in increasing numbers even as Russia reminds the Kazakh government and people of how easily it could strike militarily (as with the 'accidental' [shoot-down](#) of a commercial jet this week). Meanwhile, China continues its investments. Last month China and Kazakhstan signed economic [deals](#) valued at over \$2 billion across a range of industries from transportation and energy to rare earths mining. Bilateral trade already stands at approximately \$41 billion with both countries determined to grow that amount. As is the case with the DRC, is the West arriving too late to the game in Kazakhstan?

Meanwhile, perceived US resolutions are cause for concern in the West. President-elect Trump's public comments about imposing [tariffs](#) on Canada and Mexico, key trade partners in the United States-Mexico-Canada Trade Agreement (USMCA) as well as on China, could have profound impacts not only on the economies directly affected but globally. While Congress may be able to mitigate or diminish some of these measures, the so-called US First policy stance could fuel pre-existing nationalistic tendencies elsewhere. In the EU, for instance, this year's elections exposed ongoing and strengthening nationalist sentiments which appear to threaten EU solidarity. Both France and Germany are grappling with various degrees of political and

social unrest in the wake of those pan-national elections. The ongoing war in Ukraine continues to destabilize and distract not only neighboring nations such as Poland but the broader EU, with new concerns arising about US commitment to Ukraine and NATO.

Many are hopeful, however, that the US also will act swiftly and decisively to make long overdue changes to support development of the critical minerals sector. These could include expediting permitting of new projects, continuing and even expanding government financial incentives for construction of new mines as well as processing facilities and metal manufacturers and maintaining the [Minerals Security Partnership](#) (MSP) program which effectively assists the US in sourcing its critical minerals needs from key allies and essential sources while working to grow its own capacity.

Newly elected governments in Mexico and some Central American states are confronting narco/political terrorists and turning to nationalist rhetoric which could further export instability through the region while fueling conflicts internally.

Canada and Australia, two of the world's largest mining jurisdictions, are doubling-down on critical minerals development, with significant investments and incentives at both the national and state/provincial levels in both countries seeming likely to spur broader and faster development. They are emerging as the bright lights for Western economies.

Ongoing Israeli military actions in the Middle East, turbulence in Syria and, to a lesser degree Iran have both potentially good and bad consequences which will play out this year as well.

So what will the New Year bring? Well, it appears the coming year should see the BRICS members continue to advance (at least as individual nations if not as an alliance), along with Australia, Canada and Kazakhstan. For others, the future isn't

quite as clear.