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Geopolitics of Lithium: China's Strategic Engagement in Afghanistan's Critical Minerals Landscape

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ABSTRACT

Lithium has become one of the most strategically important minerals of the twenty first century. The technological development, energy revolution, and military modernization are supported by this respective mineral. With respect to its strategic importance in making electric cars, renewable energy storage units, electronics, medical equipment, and systems in the defense industry, it has turned lithium into a commercial commodity and a strategic resource with significant geopolitical consequences. With the rapid growth in global demand of lithium, the rivalry of secure and diversified supply chains has heightened putting China in the center of critical mineral geopolitics. Although China is the largest power in the lithium processing and battery production, it is still structurally reliant on imported lithium raw materials forcing the country to identify alternative and long-term sources. However, a country like Afghanistan with huge yet unexploited reserves of lithium has appeared as a frontier that is of strategic importance in this regard. To analyze the lithium interests of China in Afghanistan, this paper examined the geopolitical and strategic scope to place the interests within the overall global critical mineral strategy by China using qualitative research tools. This paper employed a neoclassical realist approach to demonstrate the Chinese interests in the lithium sector of Afghanistan. It is a long term strategic decision to maintain a supply chain, industrial resilience, and regional hegemony and not a short term commercial operation. Thus, this paper brings to light the convergence of Afghanistan with the geostrategic location and mineral potentials with the changing resource diplomacy and the overall geopolitical goals of China.

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Introduction

The growing pace of switching to low-carbon energy, digitalization, and new military technologies have made critical minerals more strategic. Lithium ranks in the middle of these, because of its essential use in lithium-Ion Batteries (LIBs), used in electric vehicles (EVs), renewable energy storage systems, military electronics, consumer appliances, and medical technologies. With the world storming after critical minerals, states are finding control over lithium as a factor of economic competitiveness, technological superiority, and national security.¹

The emergence of China as the largest producer of electric cars and lithium-ion batteries has put it in a position of leading the world in the lithium economy. Nevertheless, this control hides a structural weakness: China has limited domestic lithium sources compared to its fast-growing industrial demand.² As a result, Beijing has adopted an active policy of obtaining overseas lithium resources in the form of investments, long-term supply contracts, and diplomatic relations with those states where lithium resources are abundant.³

However, Afghanistan is in a privileged place in this dynamic geopolitical environment. Having had a history of conflict and underdevelopment, Afghanistan is estimated to have one of the largest untapped lithium reserves in the world.⁴ Despite the continual security and governance challenges, the mineral endowment of Afghanistan has continued to draw the attention of both regional and global powers. The involvement of China in the mineral industry of Afghanistan, and lithium in particular imparts two holistic insights. Firstly it can be viewed as a combination of resource diplomacy and a win-win situation. Secondly, this partnership can also project uncertainties like the issue of stability in the region, and economic planning on a long-term scale.

The present paper imparts holistic insights and a critical analysis of China's deep interests in lithium abundantly found in Afghanistan in a wider geopolitical framework of critical minerals. It also employs grave significance of lithium as a strategic resource, its usage in the major industries, the geopolitical and resource environment in Afghanistan. Moreover, this research paper also critically evaluates the decision power of China with respect to critical minerals on a global scale. Therefore, the paper uses a neoclassical realist approach to examine the reasons behind China's deep interests and its engagement in this activity and evaluate the strategic benefits that this engagement would give to Beijing.

Literature Review

The current literature on lithium geopolitics highlights three themes that prevail including concentration of the supply chain, strategic positioning of China, and the new frontiers of resources. According to Akerman (2025), the lithium's supply chain is highly concentrated and it is extracted by few countries whereas, the processing is massively located in China. This

¹ Kalantzakos, Sophia. 2020. "The Race for Critical Minerals in an Era of Geopolitical Realalignments." *The International Spectator* 55 (3): 1–16. doi:10.1080/03932729.2020.1786926.

² Li, Wang, and Chen, "Supply and Demand of Lithium in China Based on Dynamic Material Flow Analysis."

³ *ibid.*

⁴ Khan, "Afghanistan's Lithium: Sovereignty vs. Foreign Exploitation."

asymmetry gives China a significant bargaining power but at the same time it is vulnerable to upstream risks.⁵

According to Baskaran (2026), the scientific research insights examines the strategy of critical minerals in China that underscores the long term planning and state penetration of foreign markets to get access to resources to international market especially in Australia, Chile, Argentina, and Africa. It is deemed to be a paradigm of strategic resource diplomacy that is employed in multiple spheres i.e commercial, political, and infrastructural.⁶

Keeping the view, the mineral potential of Afghanistan has been discussed in the context of the development and security. With this respect, Blumenthal (2022) observes that the lithium deposits of Afghanistan would revolutionize the economy of this country but also warn that the lack of governance and instability are key impediments towards development and security in the region.⁷ Moreover, literature on the major role of China in Afghanistan opines that China is somehow conservative but relentless; it focuses on strategic ends like securing strategic positions in the long term rather than short term mining in the region.

According to (Karlekar, Prasad, and Greeshma 2025), China has emerged as a major power that is willing to pursue an economic engagement with Afghanistan in view of its mineral wealth which has the potential of becoming a strategic asset for China. The authors argue that China has geopolitical goals to strengthen security for the Belt and Road Initiative (BRI) and enhance economic engagement in the region.⁸ However, it does not discuss the reason behind China's willingness to accept such a risk despite the lack of political stability in Afghanistan.

Nevertheless, despite the existing literature there is still a missing link or a nexus between exploring Afghanistan as a lithium supplier in the context of the wider studies of the Chinese critical mineral policy on the global scale. Therefore, this paper adds to the literature by putting the Chinese involvement in Afghanistan in context of geopolitics of lithium and strategic resource contention.

Research Methodology

This paper employed the approach of qualitative research methodology, inductive reasoning and conducted primary data analysis. The study primarily relies on primary data for analysis. With respect to the nature of research topic and to impart critical insights, the existing information is derived from authentic sources like government reports, international organizations think tanks, media sources, and academic publications.

⁵ Ackerman, "Unplugging Beijing."

⁶ Baskaran, "New Executive Order Ties U.S. Critical Minerals Security to Global Partnerships."

⁷ Blumenthal, Purdy, and Bassetti, "Chinese Investment in Afghanistan's Lithium Sector: A Long Shot in the Short Term."

⁸ Karlekar, Lakshmi, Aanchal Prasad, and H M Greeshma. 2025. "China's Lithium Pursuits in Afghanistan's Political Economy: Sovereignty vs Foreign Exploitation." *Journal of Contemporary Politics* 4 (2): 62–72. <https://doi.org/10.53989/jcp.v4i2.25.44>.

Data Sources

The study is based on scholarly journals, governmental reports, documents, industry studies, and credible international press. These respective sources give information regarding lithium markets, the industrial policy of China, the mineral resources of Afghanistan, and the geopolitics of the region.

Analytical Approach

The analysis of the trends of the lithium demand, the global activity of China, and the resource situation in Afghanistan is performed on a descriptive analytical basis. The scientific theoretical interpretation is employed to guide the analysis instead of econometric modeling, which offers a subtle insight into the reasons behind the strategy.

Limitations of the Research

The limitation of the data is the uncertainty of the lithium reserves estimates of Afghanistan and the uncertain political situation. However, limitations can be overcome by triangulation of different sources and by emphasizing analytical reliability.

Theoretical Framework

The theoretical framework employed in this paper is the neoclassical realism. Neoclassical realism assumes that systemic pressures influence the behavior of states, but the reactions of states are mediated by domestic factors and perception of strategy, which is why it is especially appropriate in the analysis of resource geopolitics, where the needs of the economy, security issues, and long-term strategic plans are all perceived.

According to the neoclassical realist approach, lithium is a strategic asset which determines state's power and autonomy. The involvement of China in the lithium industry of Afghanistan is the manifestation of the systemic stress conditions caused by the global rivalry on the key mineral resources as well as domestic policy needs, including industrial safety, technology development, and energy conversion.

The choice of strategic patience is also explained by neoclassical realism of China. Instead of focusing on the swift extraction, China aims to gain influence, strengthen relations, and mapping itself in a good position in case circumstances will be favorable. This strategy is in line with the long-term strategic hedging of resource diplomacy that is already at play by China.

Importance and Clinical Applications of Lithium.

The strategic importance of Lithium has gained unprecedented importance in the modern international system because it is at the center of facilitating technological progress, energy transition, and modernization of the military. Contrary to the conventional use of hydrocarbons, lithium is not used directly as a substance but is an enabling substance on which whole industrial ecosystems are based.⁹ It is important, though not transactional but structural, thus an essential factor of long-term economic competitiveness and national power.

Lithium strategic significance is primarily motivated by the fact that it is an essential component of lithium-ion battery technology. Li-ion batteries are characterized by high energy density, long

⁹ Fahrenthold, "Supporting the Production of Lithium, a Key Enabler of the Energy Transition | SCOR."

cycle life, and relatively low self-discharge and are thus vital in electric cars (EVs), grid-scale energy storage and renewable energy integration.¹⁰ The need to decrease carbon emissions and end the use of internal combustion engines by states has led to a strong increase in the popularity of EVs. This has been directly translated into a lithium demand growth which is exponential.

Importantly, it is observed that China is at the center of this change. It is the greatest EV manufacturer and consumer in the world, with over half of the worldwide EV sales in the last few years. Lithium thus forms one of the basic inputs to the green industrial strategy in China, which bridges climate goals and industrial modernization and export competitiveness.¹¹ Access to lithium is not only an economic issue of concern to China but a precondition to the continued dominance in next-generation energy technologies.

In addition to transportation, lithium-based storage systems are essential in stabilization of power grids that depend on intermittent renewable energy like solar and wind energy. With the trend towards the full electrification of energy systems, the contribution of lithium to energy security also expands. States that have a stable supply chain of lithium will have resilience to disruptions in energy supply and technological dependency.

Applications in Strategies and Defense

The potential of Lithium goes decisively into the military. Military systems today are largely relying on the latest battery technologies to propel unmanned aerospace vehicles (UAVs), autonomous land systems, surveillance platforms, missile guidance systems, naval platforms, and trusted communication systems.¹² The lithium-ion batteries have been favored in these applications because they are lightweight; they have high power output and the ability to work reliably.

Moreover, lithium can be employed in aerospace applications (satellites and space exploration systems) where durability and energy efficiency are very important.¹³ With increasing technological intensity of warfare and network-centeredness, the control of lithium supply chains is directly related to military preparedness and technological advantages. Therefore, lithium is included as a strategic material in the strategic planning of national security by several defense institutions.

Geopolitically, it is dependent on imported lithium, which creates a strategic weakness. The interruption in access as a result of conflict, sanctions, or market manipulation may disrupt the defense production and capabilities. This has made lithium a resource of strategic interest in defense policy structures rather than industrial input.

Industrial and Technological applications

In addition to batteries, lithium is also involved in a variety of high-tech industries. It finds application in high-performance alloy production in aerospace and nuclear projects, heat resistant

¹⁰ Ritar Power, “Performance of Lithium - Ion Electric Vehicle Batteries-Ritar International Group Limited.”

¹¹ Briefing, “China’s 15th Five-Year Plan Recommendations - Key Takeaways.”

¹² administrator, “What Is a Military Battery? - MANLY Battery.”

¹³ Amprius, “How High-Energy Batteries Are Enhancing Satellite Operations | Amprius Technologies.”

ceramics, specialty glass and in industrial lubricants.¹⁴ These applications serve in areas that are of high importance in technological advancement, infrastructure building and strategic sectors.

The use of lithium in nuclear technology is of special importance. Lithium isotopes have been applied in nuclear fusion studies and thermo nuclear applications with certain lithium isotopes and this highlights the use in the high scientific and strategic research fields.¹⁵ Such applications are in small amounts, but their strategic implications are high.

Health and Medical Uses

Lithium has also been used over a long period in the medical practice especially in treating of bipolar condition and other psychiatric diseases.¹⁶ Pharmaceuticals containing lithium are still considered the best mood stabilizers. Also, medical devices that use lithium are based on its consistent energy production to be used in life support devices. They provide consistent power to devices like MRI machines and portable ultrasound systems, ensuring uninterrupted operation during critical diagnostics. Reliable power prevents malfunctions that could compromise diagnostic accuracy.¹⁷ In addition to medical demand having a lower percentage of overall lithium consumption, this strengthens the argument of lithium being a socially and strategically important resource.

Lithium as a Geopolitical Property

The interplay of the uses of lithium in energy, defense, health, and advanced industry has turned it into a geopolitical resource. The value of lithium as opposed to the standard commodity is that it is integrated in various strategic areas, and the control of the supply chain should be a matter of state concern and not necessarily market forces.

This is the reality of the approach taken by China. Despite its control in the processing of lithium globally and the production of batteries, China is still relying on imported raw lithium. This imbalance in structures is really a positive motivation towards the proactive policies to achieve access upstream, diversify sources of supply, and minimize the vulnerability to geopolitical risk. Lithium therefore acts as an economic facilitator as well as a strategic weakness in influencing the state behavior in the international resource competition.

Altogether, the importance of lithium is not only that it has a commercial cost but it also serves as the basis of modern power the economic, technological and military one. With demand in the world growing fast and supply chains still focused and competitive, lithium will remain at the center of the twenty first century geopolitics.

The Lithium Potential and Geopolitical Situation of Afghanistan

The potential of lithium in Afghanistan should be regarded in the nexus of geology, political economy and geopolitics. The country has traditionally been positioned as a security issue, but its mineral resource, especially lithium, makes it a latent strategic player in the new world's mineral contest over critical minerals. The significance of Afghanistan in this regard is not in its present untapped production ability which is for now somehow insignificant but in its potential

¹⁴ Trento, "An Overview on Lithium Applications."

¹⁵ World Nuclear Association, "Lithium - World Nuclear Association."

¹⁶ Ruffalo, "A Brief History of Lithium Treatment in Psychiatry."

¹⁷ PAN, "A Comprehensive Guide to Lithium Batteries for Medical Imaging Equipment."

availability in the future when the world demand of lithium is mounting up and the conventional production chains are becoming overstretched.

Geologic Potential

The lithium deposits of Afghanistan are with the major ones being the hard rock pegmatite formations and the minor ones comprising the sedimentary basins which could contain lithium-containing brines.¹⁸ Other provinces like Ghazni, Helmand, Nuristan, and Kunar have been repeatedly revealed in geological surveys to contain lithium resources.¹⁹ These are geologically identical to deposits in sections of Australia and China, which implies that Afghanistan lithium is not incidental in quality. But, as compared to the well-known lithium producers, Afghanistan does not have a complete, modern exploration information. Becoming much of the existing evaluation presupposes aerial survey and Soviet era geologic mapping with field testing being sparse.

This is a data gap which is in itself geopolitical in nature. Uncertainty on the size and extractability of the reserves may delay investment in global critical mineral markets but it also conserves strategic ambiguities. The lithium of Afghanistan can thus serve as a possible reserve of last resort, which adds greater long-term strategic importance to it, although the short-term exploitation might not be economically viable.

Structural restraints of Exploitation

The lack of lithium recovery in Afghanistan is easily misunderstood as something that is not economically viable. As a matter of fact, the major limitations are structural but not commercial. Lithium production is capital-based and infrastructure lacking. It needs a consistent power supply, water availability, road and rail connectivity, and regulatory predictability which Afghanistan has never been able to deliver on a mass scale.

These structural weaknesses are aggravated by security issues. Mining projects are long term investments as they usually take decades to complete and hence very vulnerable to political instability. The profile of risk of Afghanistan contributes greatly to the high cost of capital and this puts off the private investors and reduces the potential number of partners to include state supported or strategically driven actors. This fact predetermines the tendency of external interest: participation based not on the profitability of the moment but on strategic positioning in the long term.

Strategic Geography and Geopolitical Location

The geographic location of Afghanistan enhances the strategic importance of lithium resources in this country. Central to South Asia, the Middle East, and the convergence of these three regions is Afghanistan, which is situated close to the energy lines, trade routes, and fault lines. This is the place of chance and risk. On the one hand, with the integration of Afghanistan into the trans-regional connectivity platforms between the East Asia and Eurasia and the Middle East, it can theoretically be connected.²⁰ Conversely, it is landlocked with no established transport infrastructure, which has large logistical limitations to mineral exports.

¹⁸ Renaud, Wardlaw, and Hubbard, "Assessment of Bauxite, Clay, and Laterite Deposits in Afghanistan."

¹⁹ *ibid.*

²⁰ Chaghaty and Bagramwal, "The Geostrategic Role of Afghanistan in Connecting Central Asia with South Asia."

Geopolitically, the position of Afghanistan has been long-standing in attracting outside interference and rivalry. Resource wealth augments this dynamic by providing an economic motive to strategic interest. The presence of lithium as a key raw material in the development of modern industries increases the intensity of concern regarding interaction especially when it involves major powers who find it essential to have their supply chains in the future in a state of global insecurity.

Political Environment and Resource Governance after 2021

The 2021 political change in Afghanistan did not remove foreign interest in the mineral industry of the country, it transformed it. Although formal economic integration is constrained by political recognition concerns, regional actors have implemented pragmatic strategies that center on trade, humanitarian aid, as well as selective economic integration. Mineral resources, in particular, lithium are one of the rare areas in this environment that can bring stable income.²¹

Resource governance is, however, a major issue. Low institutional ability, inadequate transparency and non-existence of laid down regulatory regimes lead to concerns as to whether the benefits will be equitably distributed and sustainable in the long run. Geopolitically the vacuum of governance enhances the power of the external stakeholders who can supply capital, expertise and infrastructure hence defining the future political economy of the Afghan mineral industry.

Afghanistan in the middle of geopolitics of crucial minerals

The lithium in Afghanistan has to be placed in the context of big geopolitics of crucial minerals. The number of producers is now controlling the world output of lithium, and the processing capacity is very concentrated. Such a concentration poses systemic susceptibility as the key industrial states begin to look to diversification and redundancy. In this regard, Afghanistan is a strategic outpost and is not a direct supplier.

The worth of it has three dimensions that relate to each other. First, it provides the prospects of diversification in the ever-competitive market. Second, it is still in its underdeveloped form, which means that external actors can influence the norms of extraction, infrastructure directions, and contractual schemes at an early stage. Third, it is geopolitically marginalized and thus less competitive in the short term, which allows it to engage patients strategically.

Strategic Implications

There are strategic implication of the respective issue. To analyze, the lithium potential of Afghanistan can be seen as an example of the transition to resource positioning as a resource exploitation in global geopolitics. The relevance of the country is not evaluated by the present output but the future strategic determination. To the resource seeking states, the Afghanistan engagement is not about direct extraction but about the need to gain influence, optionality and accessibility in long term on the different conditions of increasing global demand.²²

Simultaneously, the experience in Afghanistan highlights the lack of symmetry between the endowment of resources and the power of resource. Mineral wealth may not automatically be

²¹ Blumenthal, Purdy, and Bassetti, "Chinese Investment in Afghanistan's Lithium Sector: A Long Shot in the Short Term," August 3, 2022.

²² Hunter and Gin, "Why Is Afghanistan Part of the Great Extractives Race?"

changed into economic or political leverage without institutional capacity including infrastructural development. Rather, it tends to bring in more outside attention and cause more dependence on the inside. The success of these structural and strategic factors in Afghanistan will determine whether the lithium becomes the key to its development or a further source of its geopolitical vulnerability.

Altogether, it is possible to state that lithium potential in Afghanistan is better perceived as a hidden strategic resource that resides in a very complicated geopolitical context. It is significant by the factors of timing, scarcity and dynamics of demand in various parts of the world as opposed to its viability at the moment. With the competition over critical minerals becoming even more acute, the role of Afghanistan in the lithium geopolitics will evolve in the future, but not as a source of lithium, but as a formation of geopolitical relevance in the calculation of the major powers in the long-term.

The Global Lithium Strategy of China

The interest of China in the lithium resources of Afghanistan should be seen as a continuation of its overall global lithium policy and not as a one-off or opportunistic involvement. The Beijing school of thought regarding critical minerals consists of long-term planning, integration of supply chains, and strategic patience, which is based on the understanding of lithium as a strategic resource, not only as a commercial input to the economy but as a backbone of economic and technological components and national security.²³ Afghanistan is a good addition in this strategy because although it is still unstable and has not yet developed its mining industry, it is a potential source of diversification and a source of options in the future in a global market that is becoming more and more competitive in lithium.

The Structural Dependence and Strategic Imperatives in China

China controls the lower ends of the world lithium value chain. It has a majority stake in the world lithium refining capacity, battery cells production as well as in the production of electric vehicles. Yet, this hegemony has a secret weakness: a large share of raw lithium which China processes is imported, around 67% of lithium is shipped to China to be refined to battery-grade level.²⁴ The domestic lithium reserves are large but cannot cope with the fast growing demand produced by the EV industry in China, renewable energy storage and defense-related technologies.²⁵ It is this dependency on the form of structure that has influenced the strategic imperative of Beijing to have stable, diversified and politically controllable sources of raw lithium.

The global lithium strategy of China is thus established on the basis of defusing the up-stream supply risk whilst retaining the dominance of the down-stream. This has been translated to the state backed overseas investments, equity interests in foreign mining projects, long term offtake deals, and diplomatic involvement with the lithium rich states. Afghanistan will be added to this strategic calculus not as a one-time answer to the lithium requirements of China, but as a possible addition to the security of supply in the long term.

²³ Zhou, "China's Strategy on Critical Minerals Surpasses Geopolitics."

²⁴ Ali, "China Takes Charge: The Politics of the Lithium Battery Economy."

²⁵ Li, Wang, and Chen, "Supply and Demand of Lithium in China Based on Dynamic Material Flow Analysis," October 1, 2024.

Lithium Strategy in Afghanistan, Strategic Frontier of China

Afghanistan is a unique entity under the China lithium portfolio of the world. The resources of lithium in Afghanistan are underexplored and untapped unlike those in more established producers like Australia, Chile or Argentina. Such underdevelopment is dangerous and has its opportunities. In the case of China, the lack of established rivals opens the prospect of early involvement and first-mover benefits whereby over time Chinese players will be able to influence the structure of extraction, future infrastructure building, and regulatory standards.

The Chinese interest in lithium in Afghanistan has been manifested in exploratory talks, pre-contract seminars, and diplomacy as opposed to hard and fast extraction contracts. This is more of a strategic positioning approach as opposed to commercializing it immediately. Considering the security concerns in Afghanistan, China has not made massive capital investments; instead, it has been having a conservative strategy that ensures that the country maintains its access in future but minimizes the exposure to risk. This conduct may be considered as the part of the overall pattern that China has shown to employ weak states by developing economic collaboration, instead of focusing on quick exploitation of resources.

Merger with Global Lithium Network of China

The interactions that China has with Afghanistan should be considered in relation to the investment that it has made in other lithium-producing states. Chinese companies in Australia have also taken interests in hard-rock lithium mines which guarantees access to high quality spodumene.²⁶ China has sought partnerships and long-term resource supply deals in Chile, Argentina, and Bolivia in the Lithium Triangle in Latin America, and usually alongside infrastructure funding.²⁷ In Africa, China has increased its influence in states that are rich in lithium like Zimbabwe and the Democratic Republic of Congo.²⁸

Afghanistan supplements this world network because it provides geographic diversification and strategic depth. Although its lithium may not find its way into global markets soon, its potential also makes China be able to hedge against other supply disruptions. Strategically, the lithium of Afghanistan is valuable because it has the feature of optionality, which consists of its ability to be used in case of good political and economic circumstances.

Geopolitical and Regional factors

The lithium interests of China in Afghanistan are directly connected with the geopolitical priorities of the country in the region. The issue of stability in the western periphery of China is not a novel issue especially in relation to Xinjiang and the security of the region. Economic participation, which may involve possible resource development is considered as a mechanism of stability promotion by using economic incentives instead of military participation.

Furthermore, Afghanistan is well located in terms of its closeness to existing and possible connectivity routes, which will contribute to the increased applicability to the overall China regional connectivity strategy of the Belt and Road Initiative (BRI). Although Afghanistan is not actually a part of significant infrastructure projects, so far, its geographical position can be

²⁶ Williams, "7 Biggest Lithium-Mining Companies in 2025 - Shanghai Metal Market."

²⁷ Paez, "China's Growing Power in Latin America 2025."

²⁸ sshah, "Zimbabwe Deals Help China Tighten African Lithium Grip - African Business."

considered in the future as an opportunity to connect with regional transport systems. Cooperation in the resources sector and such things as lithium exploration might be a point of entry into greater economic integration in the future.

The strategy that China uses is also indicative of a larger pattern in its foreign policy: that of economic statecraft expansion without direct political involvement. This in Afghanistan puts the emphasis of mutual economic gain, respect to sovereignty, and non-interference which are the same ideals as the Chinese diplomatic stance, and which are well received by Afghan officials who want to have investment without any strings attached.

Strategic Strengths of China

The lithium involvement of China to Afghanistan has a number of strategic benefits. First, it is a measure to increase resilience in the supply chains, as it increases the number of potential lithium sources. Second, early involvement gives China an informational upper hand, such as geological information and institutional knowledge, which are important in resource rivalry. Third, it enhances the economic collaboration of China in the region as opposed to coercive policies. Lastly, it supports the long-term industrial policy of China by securing the supply of an important resource of EVs, energy storage, and defense technologies.

Notably, such benefits are acquired even without extraction at the time. The location and availability of these critical minerals can be as advantageous as the production in geopolitics of critical minerals. The approach taken by China indicates that it realizes that the scarcity of supply in the future will make the existing resources that are not well developed worth more.

Analyzing it, the lithium interests of China in Afghanistan is an illustration of the change between transactional resource acquisition and strategic resource governance. As China does not seem to pursue quick extraction it can be assumed that China values influence, flexibility, and long-term alignment. This would be in line with a neoclassical realist approach, in which the systemic pressures (world competition over lithium) clash with the domestic preferences to influence the behavior of the states.

Overall, the involvement of China in lithium industry in Afghanistan can be interpreted as the main component of the overall global policy to ensure the material base of technological and economic advantage. The lithium of Afghanistan does not take the centre stage in the current supply of China but plays a valuable role in the long term strategic planning of Beijing. Since the global lithium market is set to grow in both demand and competition, as is the competition between the supply chains, the premature and cautious involvement of China in Afghanistan could generate strategic payoffs that are not commensurate with its current size.

Strategic Advantages for China

A combination of strategic benefits China gets out of its involvement in the lithium resources of Afghanistan is far beyond short-term business considerations. These benefits are entrenched in long-term computations that concern supply chain security, industrial competitiveness, geopolitical location and strategy resilience. The dynamics of geopolitics and geo economics, lithium in Afghanistan is a strategic asset and its value is to be found not only in potential and positioning but also in extraction.

Diversification in Supply Chain and Risk mitigation

Supply chain diversification is one of the strategic strengths of China. Although China is the leading processor of lithium and battery manufacturing, it is very dependent on imported raw lithium by few suppliers, especially Australia and the South American states.²⁹ This concentration will expose China to the external shocks such as geopolitical tensions, trade restrictions and regulatory shift in supplier countries. Involvement in Afghanistan will give China an extra, geographically unique lithium supply potential, so the system is not overly dependent on traditional producers.

Nevertheless, despite the lack of direct extraction, developing the lithium resources of Afghanistan contributes to the boosting of the strategic capability of China. Diversification is an insurance mechanism in a world where there is increasing competition in sourcing the important minerals globally. Strategically, the fact that there are other sources makes China have a strong bargaining position in the various lithium markets around the world.

First Mover and Informational Advantages

The early interest of China in the lithium industry in Afghanistan confers it great first-mover benefits. In low-exploration resource settings, the availability of geological information, regulatory procedures and local institutional understanding is just critical strategic resource. Through an early participation, China enjoys informational benefits that may influence subsequent extraction arrangements and contracts.

Such a premature appearance enables Chinese companies and state organizations to control and monetize the formation of the mining policies, the infrastructure scheme, and the environmental norms. This influence can also help reduce the cost of operation in the future and also minimize uncertainty in case extraction will be possible. Informational asymmetry tends to become the competitive advantage in the long term in strategic resource competition.

Long-term resource optionality

One of the strengths is the fact that China is based on the concept of resource optionality, but not direct exploitation. The lithium deposits in Afghanistan serve as a strategic reserve, which can be launched in case of favorable political, economic, or technological conditions. Such optionality comes in handy especially with the volatility of the lithium markets and long lead times in developing new mining projects.

China seems to be flexible by keeping the engagement without having to make huge deposits through extraction. This is what enables Beijing to react dynamically to changes in the world demand, technology or geopolitical circumstances. This would be a logical reaction to uncertainty in terms of neoclassical realism, where flexibility is considered more important than immediate benefits.

Enhancing Industrial and Technological Security

Lithium is a key element of the industry that is in the center of focus of China long-term development plan, such as electric cars, renewable energy storage, high-tech manufacturing, and defense technology. Guaranteeing the next generation of lithium means continuity in the

²⁹ Clark, "China Dominates Global Trade of Battery Minerals - U.S. Energy Information Administration (EIA)."

industries and preventing the vulnerability to outside threats. The potential of lithium in Afghanistan is in the line of this goal by widening the resources pool to the Chinese industrial foundation.³⁰

In the broader context of industrial security, its involvement in Afghanistan will be a complementary point to the domestic policies of China on technological independence and localization of their supply chains. It supports the capability of China to maintain high-growth sectors in the environment of international competition and strategic rivalry.

Regional Positioning and Geopolitics

The lithium interests of China in Afghanistan also have a geopolitical benefit. Resource cooperation improves the economic engagement of China so that it does not have to be engaged in political or military intervention in the region. This is in line with the foreign policy of China in general to pursue economic statecraft and non-intervention.

Moreover, China reinforces the bilateral relationships, becoming more influential in terms of its diplomatic power by establishing itself as a possible long-term collaborator in the development of Afghanistan resources.³¹ The cooperation of resources can be utilized as the means of the expansion of economic activity, such as development of infrastructures and support of trade. Such involvement in time can increase the influence of China in South and Central Asia where its strategic importance is increasing.

The involvement in the lithium industry of Afghanistan is in line with other regional and global interests of China, especially those targeted at increasing connectivity and economic integration. Although Afghanistan is yet to be incorporated into significant infrastructure systems, the partnership in the resources opens the avenues of the integration in the future with the transport and energy networks of the region.

This complementation adds a strategic value to the lithium in Afghanistan which is more than the resource itself. It makes China capable of shaping the regional economic architecture in a manner that can advance long-term strategic goals, such as market access and control over the new trade routes.

Competitive Global Strategy and Positioning

The relationship that China has with Afghanistan is reinforcing her position in the world, given the growing rivalry over resources of critical minerals. By getting into the game early, competitors will not have much room to operate, and chances will be minimized of the rival powers developing a strong hand in the lithium industry of Afghanistan. Strategic presence helps to shape the future even in the case of no active production.

Besides, the approach employed by China implies a sign of strategic patience and long-term commitment, which adds a certain amount of credibility to the country as a resource partner. Unlike short-term extractive models, the slow pace of engagement and the use of infrastructure development in China is consistent with its wider script of mutual gain and long-term cooperation.

³⁰ Shah, "Mining for Influence: China's Mineral Ambitions in Taliban-Led Afghanistan."

³¹ EFSAS, "Resource Diplomacy | China's Evolving Relationship with the Taliban."

Analytical Assessment

All above these strategic benefits exhibits the rationale behind the lithium in Afghanistan is quintessential to China compared to its present level of production. The gains are received in various dimensions that include economic, industrial, geopolitics, and strategic that support the overall critical mineral policy of China. In this way, by focusing on diversification, optionality, and influence, China will be able to take advantage of the lithium potential of Afghanistan in case the conditions allow and reduce the exposure to the current risks.

Analytically, the involvement of China is an indication of an advanced perception of critical minerals as weaponry tools of power in the long term but not in the short term. The lithium of Afghanistan is therefore a strategic asset in the global calculus of China and adds to the power, adaptability and impact in a resourceful context becoming more competitive.

Conclusion

In a nutshell, it is the process of Lithium extraction as a niche industrial input to a strategic mineral is directly connected to changes in the structure of the global economy. The rapid development of electric vehicles, renewable energy storage, and the development of electronics and the new defense infrastructure has placed lithium at the level of a valuable resource. With the growing trend towards access to lithium as being more of a matter of security than a strictly commercial issue, the competition among states when it comes to supply chains, sites of extraction or processing has become cutthroat. Within this changing geopolitical framework, Chinese interest in lithium resources in Afghanistan is a long-term and calculated move that is based on the planning of the industrial system and geopolitical calculation as opposed to short term economic payoff.

Systemically, lithium markets in the world are full of concentration and susceptibility. Primary extraction is controlled by a few countries whereas downstream processing and battery manufacturing are mostly controlled by China. This balance of power has increased Beijing nervousness over exposure to supply shocks caused by geopolitical tensions, trade restrictions or regulatory changes in supplier states. It is against this background that the involvement of China in Afghanistan has to be seen. Afghanistan is a possible future source of lithium, which is out of the current, highly competitive system of supply. Still, whether it is used under close term extraction or not, the presence of such reserves as well as the ability to exercise control over them serves as a kind of strategic insurance in an unstable international system.

In case of Afghanistan, lithium is both an opportunity and a risk. Lithium resource development has the potential to give the much needed revenues, jobs and inclusion in international markets, on the economic front. Mineral wealth provides one of the only practical ways to economic stabilization in a scenario of limited industrial capabilities and limited fiscal options. Nevertheless, the geopolitical nature of lithium also brings Afghanistan to the outside forces and strategic contest. The absence of strong systems of governance may fuel the possibility of resource development enhancing dependency, fuelling domestic inequalities, or becoming dependent outside powers. Asymmetry in the capacity between Afghanistan and the major powers like China makes the balance between national well being and foreign interest even more challenging.

The approach of China, which is more based on economic and developmental context, has a more far reaching geopolitical overture. It is an important part of the critical minerals strategy of China. Resource cooperation enables China to increase its regional influence without facing any political or military intervention, which fits its general orientation towards economic statecraft. It also reinforces the strategic posture of China in an age where technological rivalry is increasingly dependent on the ability to exert control over the upstream resources. In the case of Afghanistan, lithium is a gateway to more intensive economic relations, cooperation of infrastructure and influence. This will ameliorate the relationship of China in South and Central Asia, without the reputational and security costs of a more open form of intervention.

To conclude, the Chinese interest in Afghanistan and lithium imposes a combination of the systemic pressures and national interests. Considered in neoclassical realist terms, it is a strategic hedging of a calculated nature, aimed at leading to greater flexibility, less vulnerability and greater power in the long-term. In the case of Afghanistan, lithium provides the country with the potential of an economic change but requires it to be well managed in a highly political resource context. The lithium deposits of Afghanistan are not, however, just a mineral, but also the node in a wider project of ensuring the material base of technological and economic power in the twenty-first century in China.

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