
Kazakhstan: An Aspiring Middle Power in the Heart of Eurasia

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Key Judgments

- Recently, Kazakhstan has begun positioning itself as a middle power. While a “lightweight” by conventional capability metrics, it has assets that make it significant for the rest of the world. Its geostrategic location at the heart of Eurasia makes it both an important connector and buffer between Europe, Russia, the Middle East, South Asia, and East Asia. It is also a regional leader in Central Asia.
- Kazakhstan’s material and economic assets amplify its international importance. It is a dynamic and ambitious upper-middle-income country whose wealth comes from oil, uranium, and other metals. Kazakhstan is the world’s top producer of uranium and holds substantial reserves of critical minerals (zinc, copper, nickel, lithium, and rare earths), making it a key player for the global energy transition.
- Kazakhstan’s foreign policy has strong middle-power features. It is a staunch multilateralist, actively cooperating with other states through the United Nations and other formats. It contributes to conflict mediation and resolution by bridging actors and seeking compromises. Over recent decades, Kazakhstan has consistently steered Eurasian geopolitics away from sharp divisions and fragmentation, positioning itself as a “good global citizen.” Kazakh diplomats have also successfully practiced “niche diplomacy” in the area of nuclear nonproliferation, and the country is increasingly active in sustainable development.
- Kazakhstan is a hedger. Since the early years of independence, its leadership has successfully practiced a so-called “multivector” foreign policy, strengthening ties with the main poles of power: Russia, the United States and Europe, and China. Kazakhstan has also fostered “strategic partnerships” with Turkey, Japan, South Korea, and the Gulf countries. This approach has diminished Russia’s traditional dominance without antagonizing Moscow.
- Russia’s war against Ukraine has made Kazakhstan’s balancing act even more difficult, and its success (or failure) is existential. At present, Kazakhstan is pursuing a “double-hedging” act, leaning more toward China to hedge against Russia, while leaning more toward Turkey, the EU, the United States, the Gulf countries, Japan, and South Korea to hedge against both China and Russia. By softly balancing these different “vectors” and carefully calibrating partnerships, Kazakhstan preserves strategic flexibility and gains from diversified cooperation. It has also increased efforts to foster regional cooperation in Central Asia.
- While Kazakhstan is used to balancing relations with Russia and the United States, managing the China-U.S. rivalry is a newer challenge. China is seen as a benevolent regional power and geographic neighbor, and the countries share views on many global governance issues. This makes continued alignment certain to continue and grow stronger. However, Astana is also eager to develop its strategic partnership with the United States. At present, the Trump administration seems to favor Kazakhstan, drawn by its critical minerals and its accessibility as a diplomatic partner; at the same time, the broader U.S. foreign policy trajectory seems oriented toward the dismantlement of international order, posing risks for smaller countries like Kazakhstan.
- Kazakhstan actively pursues cooperation with both the United States and China in energy transition and digital transformation. China has the will and capacity to be its primary partner in these areas. However, national security concerns about diversification and muted concerns about excessive technological dependence on China motivate Kazakhstan to develop a strong partnership with the United States. While there is room to maneuver at this early stage, this might not be the case later, particularly if the technological decoupling between the United States and China continues. Kazakhstan can play a limited role in mitigating such decoupling by working with like-minded countries that view forced alignment as

generally and economically damaging.

- To maintain its balancing act amid intensifying great-power competition, Kazakhstan increasingly relies on relations with other middle powers. These states serve as like-minded partners in promoting global trade, transport connectivity, green transition, and digital transformation. The country's flourishing strategic partnerships with Turkey, the United Arab Emirates, and Singapore are particularly important. Apart from a comprehensive cooperation agenda, these countries also serve as role models and gateways to their respective regions.
- Growing cooperation and connectivity within and among regions, led by middle powers, is a defining trend. Kazakhstan, together with Uzbekistan, promotes Central Asian regional cooperation, cohesion, and international standing. If successful, Central Asia could play a constructive role in Eurasian geopolitics and geoeconomics, working in concert with the Gulf and ASEAN regions.

Kazakhstan as an Aspiring Middle Power

Kazakhstan has been positioning itself as a middle power since 2024. In terms of traditional power capabilities (population size, economy, and military strength), it is a relative “lightweight” compared with countries typically classified as middle powers.¹ However, the country has assets that give it outsized importance for the rest of the world. It is the world's ninth-largest country by land area and located in the heart of Eurasia, making it a key connector (or buffer) between Europe, Russia, the Middle East, South Asia, and East Asia.

Kazakhstan is an upper-middle-income country and the biggest economy in Central Asia, accounting for 60% of the combined gross domestic product (GDP) of the region's five states. It is also the second-largest economy among the post-Soviet countries, after Russia.² Much of its wealth comes from the extraction of oil, uranium, and other metals. In 2024, Kazakhstan produced 1.9% of the world's oil.³ That same year, it also remained the number one uranium producer, providing 39% of total global supply.⁴ Additionally, Kazakhstan has significant reserves of critical minerals, including zinc, copper, nickel, lithium, and rare earth metals, making it an important actor in the global energy transition and digital transformation. It is also the sixth-largest producer of wheat worldwide.⁵

To overcome the impediment of being a landlocked country, Kazakhstan has invested in transport infrastructure. The country is now solidifying its position as a Eurasian transportation hub, the “buckle” of the Silk Road Economic Belt (SREB), part of China's Belt and Road Initiative (BRI). Over the past decade, it has promoted the development of the Middle Corridor, also known as the Trans-Caspian International Transport Route, linking Central Asia, South Caucasus, and Europe across the Caspian and Black Seas. Its primary trade partners are China, Russia, and Italy, followed by South Korea and Turkey.⁶

Kazakhstan is a rapidly digitizing economy. In the World Digital Competitiveness ranking, it is in 34th place, ahead of Portugal, Malaysia, Latvia, Turkey, and Italy.⁷ The country also has a high e-government development index, ranking 24th out of 193 countries, ahead of Switzerland, Turkey, France, and Canada. It ranks first in the Commonwealth of Independent States and among landlocked countries.

While its power indices are modest, Kazakhstan ticks the boxes more comfortably in terms of middle power foreign policy behavior. It is a staunch multilateralist country, actively cooperating with other states through the United Nations (UN) and other formats. It contributes to conflict mediation and resolution by bridging actors and seeking compromises. Kazakh diplomats have developed the expertise to practice “niche diplomacy” in the area of nonproliferation, and the country has become increasingly active in sustainable

development, positioning itself as a “good global citizen.”⁸ Like other middle powers, Kazakhstan seeks greater strategic autonomy for itself and Central Asia by skillfully balancing its relations with other powers while fostering regional cooperation.

Kazakhstan’s self-identification as a middle power is framed as a contribution to global order and prosperity, signaling its readiness to share the global governance burden. In an article titled, “Middle powers have the power to save multilateralism,” President Kassym-Jomart Tokayev of Kazakhstan — a career diplomat and former UN undersecretary-general — argues that Kazakhstan and other middle powers, “unburdened by complexities of superpower politics,” can “navigate intricate diplomatic terrains and carve paths toward compromise and reconciliation,” since they are “deeply committed to upholding the multilateral system” and “rely on these essential global mechanisms to resolve disputes, safeguard our territorial integrity, and address collective challenges ranging from climate change to pandemic.” He assures the international audience that Kazakhstan will continue to play the role of a “responsible manager” in the global arena and promote nuclear disarmament and nonproliferation, biological security, the Sustainable Development Goals (SDGs), conflict resolution, and a strong multilateral system.⁹

A Staunch Multilateralist

Kazakhstan is a committed member of the United Nations. As a result, the country’s current foreign policy concept (2020-2030) prioritizes maintenance of international peace and security based on the UN Charter principles.¹⁰ Kazakhstan successfully bid to serve as a nonpermanent member of the UN Security Council in 2017-18 and a member in the Human Rights Council in 2022-24. It has contributed military personnel to eight UN peacekeeping missions in Asia, the Middle East, and Africa. Since 2024, its first independent peacekeeping contingent has been stationed in the Golan Heights as part of the UN Disengagement Observer Force (UNDOF).¹¹

Under the UN umbrella, Kazakhstan actively promotes the nonproliferation of nuclear weapons. This policy grew out of decisions made at the dawn of independence. In 1991, on the eve of independence, the government closed the Semipalatinsk nuclear test site, then the world’s second largest. The move ran counter to the wishes of the Soviet military but marked a victory for the mass antinuclear movement Nevada-Semei, which linked the suffering of local communities exposed to hundreds of Soviet nuclear tests with that of affected people in the United States and other parts of the world. In 1992, Kazakhstan acceded to the Nuclear Nonproliferation Treaty as a non-nuclear state, agreeing to dispose of the Soviet nuclear arsenal it had inherited — the world’s fourth largest at the time — and to eliminate fissile materials stocked on its territory.

This denuclearization experience shaped Kazakhstan’s approach to global politics, demonstrating how active and constructive diplomacy could enhance national status and reputation. With its four Central Asian neighbors, Kazakhstan created the Central Asian Nuclear-Weapons-Free-Zone (CANWFZ). Symbolically, the treaty was signed at the Semipalatinsk test site in 2006. Kazakhstan was also among the first 50 states to sign and ratify the Treaty on Prohibition of Nuclear Weapons, the first multilateral and legally binding agreement to ban the development, stockpiling, testing, and use of nuclear weapons, which entered into force in 2021. Together with Kiribati, Kazakhstan leads work on Articles 6 and 7 of the treaty, which address assistance for victims of nuclear tests and rehabilitation of contaminated land. The country also promotes the early entry into force of the Comprehensive Nuclear-Test-Ban Treaty (CTBT), which it has signed and ratified.¹² It hosts several stations that are part of the CTBT’s International Monitoring System, a global network of monitoring facilities established to verify compliance. Kazakhstan also hosts the International Atomic Energy Agency Low-Enriched Uranium Bank, which increases the security of nuclear fuel supply, thus reducing incentives

for countries to develop sensitive enrichment technologies. Kazakhstan was approved for this role because of its denuclearization record and its ability to bridge political divides, including its good relations with Iran.

Beyond nuclear issues, Kazakhstan is a state party to both the Chemical Weapons Convention and the Biological Weapons Convention (BWC). In the wake of the COVID-19 pandemic, President Tokayev proposed the establishment of an International Agency for Biological Safety to prevent the militarization of biological developments, establish a multilateral export-control mechanism, and increase the capacity of BWC member states in biological and biotechnological safety.¹³ In 2024, the UN General Assembly adopted a resolution submitted by Kazakhstan and co-sponsored by 15 countries calling for substantive consideration of the proposal.¹⁴

Kazakhstan is also increasingly active in sustainable development. It successfully advocated to establish the UN Regional Center for the Sustainable Development Goals (SDGs) for Central Asia and Afghanistan in its biggest city, Almaty. The center, inaugurated in 2025, is the first of its kind with this mandate and will serve as a pilot. The resolution establishing the center was co-sponsored by 152 countries, reflecting significant engagement from Kazakh diplomats.¹⁵ Additionally, in 2024, together with France, the World Bank, and Saudi Arabia, Kazakhstan co-organized the One Water Summit in Riyadh. The summit aimed to accelerate action on SDG 6 — clean water and sanitation — in preparation for the 2026 UN Water Conference.

Having reached upper-middle-income-country status, Kazakhstan started providing official development assistance (ODA). In 2020, it launched its own ODA agency — KazAID — to promote sustainable development and inclusive growth in partner countries. While Kazakhstan's aid geography is global, its focus is on Central Asia and Afghanistan. Notably, unlike China, it participates in the OECD Development Assistance Committee as an invited party. Through KazAID, it has signed cooperation agreements and memorandums of understanding with other aid agencies, including JICA (Japan), KOICA (South Korea), TICA (Turkey), and USAID.

Straddling Europe and Asia, Kazakhstan is engaged in the Eurasian, European, and Asian multilateral formats. It is a founding member of the Russia-led Collective Security Treaty Organization (CSTO) and the Eurasian Economic Union (EAEU), the second-largest country in both organizations. In CSTO, it has softly steered the organization away from outright hostility with the West, while in the EAEU, Astana has resisted Moscow's pressure to pursue political integration. Kazakhstan is also a founding member of the Shanghai Cooperation Organization (SCO). Prior to the organization's first expansion in 2017, when India and Pakistan joined as full members, Kazakh diplomats worked to dispel the myth of the SCO as an "Eastern NATO" in the making.¹⁶

Additionally, Kazakhstan is working closely with another Eurasian power, Turkey, as the "western and eastern wings of the Turkic world."¹⁷ In 2009, they co-founded the Turkic Council (Cooperation Council of Turkic-speaking States), then upgraded and renamed it as the Organization of Turkic States (OTS) in 2022. Its comprehensive agenda includes political, cultural, educational, economic, transport, energy, and — increasingly — security and defense cooperation. The OTS is the institutional embodiment of the strengthened solidarity of Turkic states. Alongside Turkey, Kazakhstan is also a member of the Economic Cooperation Organization (formerly the Regional Cooperation for Development), founded by Iran, Pakistan, and Turkey, as well as the Organization of Islamic Cooperation (formerly the Organization of the Islamic Conference), which comprises 57 Muslim-majority states.

Kazakhstan remains embedded in the European and Euro-Atlantic security architecture. It is an active member of the Organisation for Security and Cooperation in Europe (OSCE) and the NATO Partnership for Peace (PfP) program. It successfully won its bid to chair OSCE in 2010 — no small feat for an authoritarian country — and convinced member states to hold a summit in Astana, 11 years after the last summit in Istanbul. The adopted

commemorative declaration recommitted the members to the “common and indivisible Euro-Atlantic and Eurasian security community,” free of “spheres of influence and zones with different levels of security.”¹⁸

Since the dissolution of the Soviet Union, Kazakhstan has also sought to reconnect with Asia. At the UN General Assembly in 1992, former President Nursultan Nazarbayev proposed to create a Conference for Interaction and Confidence-Building in Asia (CICA), a continental dialogue platform modeled after the Conference on Security and Cooperation in Europe. He argued that Asia’s great diversity did not preclude regional security cooperation.¹⁹ China and other Asian states supported the idea, leading to the founding conference in Almaty in 1999 and the first summit in 2002. At present, it has 28 member-states and 10 observer states, and is transforming into a full-fledged organization.²⁰

The CICA initiative reflected the Kazakh leadership’s belief in the importance of preventive diplomacy. In 2013, Kazakhstan hosted two summits on the Iranian nuclear program. Having good relations with both Iran and the West, it could successfully practice what it has called its “niche” nuclear diplomacy. Although the summits did not produce a solution, they helped lay the groundwork for subsequent negotiations in Geneva and the Joint Comprehensive Plan of Action, also known as the Iran nuclear deal, signed in 2015.

The country’s leaders and diplomats have also engaged in conflict-mediation efforts. From 2017 to 2023, Kazakhstan hosted negotiations on the Syrian conflict (known as the “Astana process”). While Kazakhstan lacks expertise of its own on the Middle East, it leveraged its good relations with Russia, Turkey, and Iran at a time when Russia-Turkey relations were strained following Turkey’s downing of a Russian jet over the Turkish-Syrian border.²¹ In May 2024, Kazakhstan hosted the Armenian and Azerbaijani foreign ministers to discuss peace agreements in Almaty, and it offered to host future peace treaty talks in Astana, a proposal that Baku found acceptable.²² Both Presidents Nazarbayev and Tokayev have also offered Kazakhstan as a platform for potential Russia-Ukraine negotiations.

Kazakhstan has supported various peace, stabilization, and reconstruction efforts in Afghanistan and has raised issues related to its neighboring country — often framed as part of “Greater Central Asia” — and the plight of its people in international forums. Thus, during its tenure on the UN Security Council, Kazakh diplomats organized a council mission to Kabul. Kazakhstan is also a member of the Heart of Asia-Istanbul Process, initiated by Afghanistan and Turkey in 2011 to strengthen regional security, economic, and political cooperation with Afghanistan through dialogue and confidence-building measures. Over the years, it has provided humanitarian assistance to Afghanistan.

A Hedger

Kazakhstan employs a “hedging” foreign policy.²³ Since the early years of independence, the country’s leadership has developed and practiced a so-called “multivector” foreign policy, strengthening ties with the main poles of power: Russia, the United States and Europe, and China. Kazakhstan’s current foreign policy concept for 2020-2030 defines these relationships as allied relations with Russia, a comprehensive strategic partnership with China, a strategic partnership with the United States, and enhanced partnership and cooperation with the EU and its member states.²⁴ Kazakhstan has also fostered “strategic partnerships” with other middle powers, including Turkey, Japan, South Korea, and the Gulf countries. The approach has helped Kazakhstan balance different vectors, benefit from cooperation, and reduce risks from external pressures, including diminishing Russia’s traditional dominance without directly antagonizing Moscow.

Kazakhstan’s balancing act has never been easy, but Russia’s war against Ukraine has made it significantly more difficult, raising the existential stakes of success or failure. In response, Kazakhstan’s leadership has

assumed a four-pronged approach. First, it maintains a well-calibrated, ambiguous neutrality vis-à-vis the Russia-Ukraine war. Officials continue to describe Russia as Kazakhstan's strategic partner while maintaining good relations with Ukraine and the West, including abstaining on UN General Assembly votes related to the conflict. Second, Kazakhstan has leaned toward China to increase its sense of security under Beijing's political umbrella, viewing China as a powerful neighbor with leverage over Russia and a stake in Kazakhstan's security and well-being. Third, it has deepened engagement with the EU, the United States, Turkey, the Gulf countries, Japan, and South Korea to hedge against both China and Russia. Fourth, Kazakhstan has pursued strategic partnerships with its neighbors, Uzbekistan and Azerbaijan, pushing for regional cooperation in Central Asia and in the Caspian region on the assumption that working together increases resilience to external pressures, manipulations, and other challenges.

The role of the EU and European countries in Kazakhstan's balancing act is of great importance. While they are not immediate neighbors, the relations are strong and comprehensive. The EU, taken as a whole, is Kazakhstan's largest trading and investment partner. In 2024, bilateral trade reached \$48.7 billion, with Kazakhstan's exports to the EU totaling \$38.1 billion and imports \$10.6 billion. Since 2005, European investment in Kazakhstan has exceeded \$200 billion.²⁵ Political ties are well developed and considered strategic by both sides.

Astana continues to carefully calibrate its foreign policy vectors. Both Russia and China want to see Kazakhstan join BRICS, and the group's 2024 summit in Kazan seemed like a good occasion to announce an application. Instead, on the eve of the summit, President Tokayev's press secretary stated that Kazakhstan would abstain from seeking membership in the near future, citing the organization's "multistep process of joining." The statement also noted President Tokayev's opinion that the UN should remain the primary platform for "discussing all pressing international matters, including those related to the construction of a just world order."²⁶ As a compromise, Kazakhstan joined BRICS as a partner country in January 2025.

While there are domestic actors favoring the Russian, Turkish, or Western vector for Kazakhstan, there is no serious contestation of the policy itself. The multivector approach is deeply embedded and viewed as part of Kazakhstan's identity. Unless major external events lead to fundamental shifts, the country is likely to stay the course.

Relations with Middle Powers

Kazakhstan's multivector foreign policy has long pursued the simultaneous development of multiple partnerships to its west, east, north, and south. Growing geopolitical turbulence, combined with Kazakhstan's new self-identity as a middle power, has further reinforced this approach. The country is increasingly seeking like-minded partners with whom it can collaborate on various issues of global and regional security and development. Well-established and expanding partnerships with Turkey, the United Arab Emirates (UAE), and Singapore are particularly important. These three countries are role models for Kazakhstan, serving as focal points in their respective regions and promoting interregional cooperation and connectivity.

Turkey and Kazakhstan share ethnic, linguistic, and religious affinities. Ankara was the first to recognize Kazakhstan's independence and early on encouraged trade and investment, launched large-scale education programs, and established a visa-free regime for the citizens of Kazakhstan. Additionally, Turkish Airlines played a key role in connecting Central Asian capitals with Turkey and the world.

Today, the two countries define their relationship as an enhanced strategic partnership.

There are strong similarities in their worldviews: both are secular countries with Muslim-majority populations, both are comfortable in a globalized environment, and both get along with the West as well as non-Western actors. These traits allow them to act as mediators in international disputes. Kazakhstan and Turkey also promote Turkic solidarity and advance visions of Eurasianism that differ from Russia's. On the Kazakh side, the close partnership is underpinned by a high degree of public trust. According to survey data from November and December 2022, 31% of Kazakhstani respondents had a very favorable opinion of Turkey, compared to 14% for Russia and 13% for the United States.²⁷

Security and military cooperation between Kazakhstan and Turkey has expanded steadily. Since 1999, Turkey has hosted the NATO Partnership for Peace training center in Ankara, and Turkish military education institutions offer an alternative to Russian ones. In 2018, the two countries signed an agreement on military cooperation, providing the legal foundation for joint military exercises, intelligence sharing, and research and development. In 2022, they agreed to jointly produce combat drones in Kazakhstan, the first such arrangement made by Turkey with a foreign country.²⁸

As an economic partner, Turkey provides Kazakhstan with an opportunity to connect to Europe, bypassing Russia. The Baku-Tbilisi-Ceyhan pipeline, which links Azerbaijan, Georgia, and Turkey, can accommodate limited volumes of Kazakh oil diverted from the Russian route. In addition, the Middle Corridor enables the transportation of uranium and other commodities affected by sanctions.

Kazakhstan has also maintained a special relationship with another Muslim-majority country, the UAE, since 1993. In addition to religious ties, the two countries share a nomadic past and the tradition of falconry. This facilitated relations between former President Nursultan Nazarbayev and Abu Dhabi's royals, who received access to vast hunting reserves in Kazakhstan. Over time, Kazakhstan and the UAE have developed a set of comprehensive intergovernmental agreements regulating the key aspects of their relationship, making the UAE Kazakhstan's principal partner in the Arab world.²⁹ Since 2012, a visa-free regime for the citizens of both countries has supported travel and education flows from Kazakhstan to the UAE. There is also growing security cooperation in military training, intelligence sharing, and efforts to combat terrorism and extremism.

For many countries, the UAE is perceived as a role model, successfully adapting to global capitalism on its own terms and pragmatically blending tradition and experimentation. Its international financial centers, Dubai International Financial Center and Abu Dhabi Global Market, inspired Kazakhstan to create its own Astana International Financial Centre (AIFC), which functions as a separate jurisdiction based on English Common Law. The AIFC's stock exchange has established partnerships with the Dubai Nasdaq and Abu Dhabi Securities Exchange. The UAE also played a key role in introducing Islamic banking in Kazakhstan.

Today, the UAE has become one of the top 10 investors in Kazakhstan, reflecting aligned strategic visions and interests.³⁰ Both countries prioritize transport corridors and logistics in Eurasia, renewable energy, sustainable development, and the opportunities of digital transformation. The Abu Dhabi Ports Group, aspiring to be a global leader in developing sustainable trade corridors, is Kazakhstan's strategic partner in the Middle Corridor. Together with the Kazakh national oil company KazMunayGas, the two co-manage the country's ports and terminals while developing a tanker and merchant fleet in the Caspian Sea and beyond. Masdar, a UAE state-owned renewable energy company, is investing in substantial solar energy and energy storage projects, while data analytics company Presight AI is developing a smart city platform in Astana and supporting the launch of the country's first super-computer cluster. Kazakhstan also participates in the Dubai Electricity and Water Authority Space program (Space-D), the world's first utility to use nanosatellites to optimize the maintenance and planning of electricity and water networks.³¹

While Turkey and the UAE are Kazakhstan's key partners in Europe, Central Eurasia, and West Asia, Singapore

is its primary collaborator in the Association of Southeast Asian Nations (ASEAN) region. The city-state of Singapore and its former leader, Lee Kuan Yew, captured the imagination of Kazakh policymakers from the early days of independence. Singapore, authoritarian but highly effective in governance, seemed like a perfect role model. Inspired by Singapore's Temasek Holdings and other successful sovereign funds, the Kazakh government created the National Welfare Fund "Samruk-Kazyna" in 2008 to manage the country's major national assets, including transport and logistics, oil and gas, and uranium. Admiring Singapore's efficient bureaucracy, Kazakhstan has sought to import the city-state's public policy and public administration know-how. The Lee Kuan Yew School of Public Policy helped the Nazarbayev University Graduate School of Public Policy develop its degree and training programs, and Kazakhstan's Academy of Public Administration under the President of the Republic of Kazakhstan cooperates with the Civil Service College of Singapore.

Singapore is also highly attractive as a global leader in infrastructure development, technology, and finance. In 2023, Singaporean port group PSA International and Kazakhstan's national railway company Kazakhstan Temir Zholy (KTZ) jointly developed a holistic physical and digital ecosystem for Middle Corridor users, aiming to enhance trade flows between Southeast Asia, China, Central Asia, and Europe. At the same time, Singaporean government-owned consultancy company Surbana Jurong is developing a master plan for 1,000-square-kilometer Special Economic Zone Alatau City (G4 City), with plans to expand joint ventures in green energy, finance, agribusiness, e-commerce, and mining and processing of critical minerals.³²

Kazakhstan's flourishing strategic partnerships with Turkey, the UAE, and Singapore reflect the rising agency and importance of middle powers. Increasingly, these countries are working together to promote global trade and transport connectivity and to successfully ride the waves of green transition and digital transformation. All four countries are active in global diplomacy and, in addition to bilateral cooperation, they promote region-to-region ties. Turkey bridges Central Asia, the South Caucasus, and Europe. The UAE contributes to this effort and plays a leading role in fostering cooperation between the Gulf Cooperation Council and five Central Asian states. Singapore stands ready to serve as a gateway for Kazakhstan's engagement with ASEAN countries.³³

Relations with China and the United States

Both China and the United States are extremely important partners for Kazakhstan. China has the advantage of geographic proximity. Furthermore, the Chinese government has long prioritized close relations with Kazakhstan and assigned it the level of "eternal comprehensive strategic partnership." The leaders of the two countries meet regularly.

In contrast, the United States is geographically distant, and Kazakhstan has never been a top U.S. policy priority.³⁴ Not a single acting American president or vice president has ever visited the country. Despite persistent diplomatic efforts, Kazakhstan has failed to secure a normal trade status with the United States, as it remains bound by the Jackson-Vanik amendment to the Trade Act of 1974, which conditioned trade relations with the Soviet Union (suspending its Most Favored Nation status) based on its restrictions on Jewish emigration. Despite the amendment's anachronistic nature, the U.S. Congress has not yet repealed it for Kazakhstan, even though it has done so for Russia and Kyrgyzstan.³⁵

While Kazakhstan gladly receives Chinese investments and technologies, the government is actively pursuing U.S. investments and technologies. The growing U.S.-China rivalry and technological decoupling risks testing this approach. Like other countries, Kazakhstan does not want to be forced to choose; in practice, decoupling from China is not an option.

In the area of security, Kazakhstan has well-established cooperation with both the United States and China, in the bilateral and multilateral formats (through NATO's Partnership for Peace and the Shanghai Cooperation Organization, respectively). However, the U.S. troop withdrawal from Afghanistan removed an important incentive for military cooperation with Central Asian partners. Cooperation with China, on the other hand, has continued to expand.

In global governance, Kazakhstan has followed both the U.S. and Chinese lead. From the early days of independence, Kazakh policymakers worked to position the country within the U.S.-led international order, appreciating the great benefits it offered smaller states. Kazakhstan cooperated with U.S.-led nuclear nonproliferation efforts, supported the U.S./NATO military campaign in Afghanistan, and joined major climate initiatives, such as the Paris Agreement and the Global Methane Pledge. At the same time, the country showed less enthusiasm for the U.S. agenda of democracy and human rights, fearing "color revolutions."³⁶ In this area, Kazakhstan aligned more closely with China and its state-centric emphasis on non-interference in domestic affairs.

Under the second Trump administration, the United States has sharply altered course, starting to dismantle elements of the order it had so painstakingly built after World War II. As Washington has embraced the self-centered "America First" approach — and cut back global engagement, foreign aid, and public diplomacy programs — Beijing is doing the opposite, positioning itself as a more cooperative and predictable global power and investing in soft-power instruments.

Relations with China

From the outset, China assumed a friendly and benevolent approach toward Kazakhstan, and the two countries were able to quickly and successfully resolve the territorial dispute inherited from the Soviet period.³⁷ In the 2000s, China-Kazakhstan relations evolved into a strategic partnership that, in 2019, was elevated to an "eternal comprehensive strategic partnership," the highest level in China's hierarchy of partnerships.³⁸ Now, the countries are "at a critical stage of development and revitalization, and are companions, on the path to modernization," and they have committed not only to further "promote the synergy of development strategies" but also to "firmly safeguard each other's core interests, and be solid supporters than can be relied on and trusted by each other."³⁹

Their complementary economic interests provide a solid foundation for a thriving partnership. China buys Kazakhstan's oil, gas, uranium and other metals, and agricultural goods. Kazakhstan imports machines, equipment, transport vehicles, manufactured goods, textiles, and chemicals from China. In 2023, China became Kazakhstan's largest single-country trade partner, with a trade volume of \$31.5 billion, or 22% of the country's trade, overtaking both Russia and Italy.⁴⁰ China and Kazakhstan also collaborate in the strategic areas of digital transformation and green transition.

Both countries are strongly invested in Eurasian transport connectivity to bolster economic growth and national security. Today, they are linked by the Western Europe-Western China Highway, stretching from the Port of Lianyungang on the Yellow Sea to St. Petersburg on the Baltic Sea. The two countries currently have two railway crossings and are building a third. Kazakhstan's national rail company, Kazakhstan Temir Zholy, has established five joint ventures with Chinese partners: the multimodal dry port of Khorgos on the Kazakh-Chinese border, a terminal at the Port of Lianyungang, a terminal at the Xi'an dry port, a terminal near Almaty, and a container hub at the seaport of Aktau on the Caspian Sea.

This growing economic cooperation is supported by an active and sustained political dialogue, with the two

countries' leaders meeting regularly. Between 2013 and 2024, President Xi visited Kazakhstan five times, placing it among the five countries he visited most frequently (alongside Russia, France, the United States, and South Africa).⁴¹ Notably, his first international trip following the COVID-19 pandemic was to Kazakhstan. Between 2019 and 2024, President Tokayev also visited China five times. Tokayev's fluency in Mandarin and his decades-long engagement with Chinese officials as Kazakhstan's foreign minister, prime minister, and president enhance the quality of their communication.

Kazakhstan-China security cooperation is also well developed. Under the Shanghai Cooperation Organization, Kazakh and Chinese armed forces regularly conduct joint anti-terrorist exercises, and China provides personnel training and military equipment as part of its assistance. Top military officials from both sides meet regularly, and cooperation has intensified since 2022.

Bilateral relations have developed not only across a wide range of areas but also at multiple levels — between government agencies, provinces, and cities — creating a plethora of institutional and personal ties. Kazakhstan has an embassy in Beijing; three consulates general in Shanghai, Hong Kong, and Xi'an; and a passport and visa service office in Ürümqi. Meanwhile, China is represented by an embassy in Astana and two consulates general in Almaty and Aktobe. Since 2023, there has been a 30-day visa-free travel regime between the two countries.

In addition, China and Kazakhstan endorse each other's international initiatives. Kazakhstan joined the Belt and Road Initiative (BRI) and its sub-initiatives (the Green Silk Road and Health Silk Road), cofounded the Asian Infrastructure Investment Bank (AIIB), and supported the Global Development Initiative and the Global Civilization Initiative. China and Kazakhstan also tend to cooperate in multilateral frameworks, reflecting an alignment of interests and perspectives. They abstain on Russia-related votes in the UN General Assembly; they are unwilling to endorse Russia's support of separatism or its outright aggression against Georgia and Ukraine, but also reluctant to antagonize Moscow. They also vote similarly on Middle East issues, such as rejecting the U.S. decision to recognize Jerusalem as Israel's capital, supporting the resolution on Israel's withdrawal from the Golan Heights in Syria, and demanding a ceasefire in Gaza.

Beijing has consistently supported Kazakhstan's independence. From China's perspective, the existence of five small, friendly Central Asian states — provided they are stable and secure — serves its strategic interests. This support has become even more valuable in the context of the Russia-Ukraine war. President Xi has repeatedly stressed China's firm support for Kazakhstan's territorial integrity and sovereignty, and President Tokayev has expressed Kazakhstan's appreciation for this stance.⁴²

China also supports Kazakhstan's efforts to strengthen regional cooperation in Central Asia. In 2020, Beijing launched its C5+1 foreign policy ministerial meetings. In 2023, President Xi hosted his Central Asian counterparts for the first C5+1 summit in Xi'an — the historic departure point of the ancient Silk Road — marked by much imperial pomp and circumstance. The summit concluded with a joint declaration reaffirming the parties' "desire to jointly create a closer community of a common destiny for Central Asia and China" and readiness to strengthen the BRI's "harmonization and alignment with the initiatives and national development strategies of the Central Asian states."⁴³ The gathering was followed by C5+1 meetings of agriculture and transport ministers.

While Kazakhstan-China relations are generally positive and forward-looking, they are not without their problems. One major challenge is water management and distribution. The two countries share 24 transboundary rivers, and the growing demand for water in the Xinjiang province of China risks creating significant water shortages downstream in Kazakhstan. Another challenge stems from a certain degree of Sinophobia, inherited in part from the Soviet times, and widespread public anxieties about China's expansion and intentions.

These concerns include growing indebtedness, economic dependence, environmental impact, and cultural influence. The relationship has been described as one of “warm politics, cold public.” China’s image was also tarnished by the mistreatment of Muslim minorities, including ethnic Kazakhs. Still, recent public opinion surveys show that Kazakhstanis are slowly warming to China, including Chinese investments, projects, and technology. In 2023, support for Chinese projects in energy and infrastructure exceeded 50% and 60% respectively. Notably, younger people tend to hold more favorable attitudes toward China.⁴⁴

Relations with the United States

The United States played a vital role in Kazakhstan’s transition to independence, providing political support, ushering the newly independent country into global and Euro-Atlantic institutions, and delivering substantial technical, humanitarian, and military assistance. At the same time, the U.S. government pressured its Kazakh counterpart to denuclearize. The two countries worked successfully on implementing the Cooperative Threat Reduction (CTR) program, aimed at consolidating, securing, and eliminating weapons of mass destruction infrastructure and materials across the former Soviet Union.

Two U.S. energy companies became Kazakhstan’s first major foreign investors. In 1993, Chevron signed a “deal of the century” to develop the Tengiz field, one of the world’s deepest supergiant oil fields; ExxonMobil soon joined the consortium. At present, Tengizchevroil is one of Kazakhstan’s largest taxpayers, with direct financial payments to the state totaling \$6.5 billion in 2024.⁴⁵ Since then, the range of U.S. businesses working in the country has substantially increased. Kazakhstan is now actively seeking investments from U.S. high-tech companies.

The United States and Kazakhstan cooperate extensively on security and defense. In 1993, the Arizona National Guard partnered with Kazakhstan through the National Guard’s State Partnership Program, a collaboration that has since continued successfully. In 1996, the United States helped establish the Central Asian Battalion (CENTRASBAT), which later led to Kazakhstan’s peacekeeping brigade that currently participates in UN peacekeeping operations. Additionally, the United States helped Kazakhstan implement military reforms and develop an Individual Partnership Action Plan with NATO, signed in 2006. In turn, Kazakhstan supported the U.S. military campaign in Afghanistan, allowing NATO planes to use its airspace and participating in the Northern Distribution Network, a system of logistics routes connecting Baltic and Black Sea ports with Afghanistan via Central Asia, developed to secure U.S. supply lines.⁴⁶ Kazakhstan also deployed a small group of military engineers to Iraq to assist with demining, demonstrating its support for the United States and its efforts to establish peace and security in Iraq.

The Afghanistan campaign led to a partial reorientation of Central Asia from a European frame of reference to a South Asian one. Prior to 2001, the prevailing strategic approach focused on building sovereignty for the newly independent states vis-à-vis Russia by developing connections with the West. By contrast, the new approach sought to link the region to its southern neighbors. In 2011, then-Secretary of State Hillary Clinton, during a visit to India, announced the New Silk Road Vision initiative, which aimed to help Central Asian states develop southern routes connecting them to the large markets of Pakistan and India.

Central Asian intraregional cooperation has featured prominently on the bilateral agenda, with both sides viewing it as a way to make the region more resilient to external pressures and challenges. In Samarkand, Uzbekistan, in 2015, then-Secretary of State John Kerry partnered with five Central Asian foreign ministers to launch the C5+1 platform to improve regional trade, communication, energy linkages, and transit opportunities. The platform also sought to cultivate a favorable business climate to attract investments, address environmental sustainability challenges and promote clean energy and green technology, support Afghanistan’s

development, and enhance cooperation to prevent and counter transboundary threats and challenges, such as terrorism, weapons of mass destruction trafficking, drug trafficking, and human trafficking.⁴⁷

The withdrawal of U.S. troops from Afghanistan in 2021 reduced the importance of Central Asia for U.S. policymakers. In 2022, Russia's full-scale invasion of Ukraine partially reversed the trend, as Washington refocused its attention on the security of Russia's "near abroad." Today, both Astana and Washington are concerned about Russia's capacity to disrupt the flow of Kazakh oil — produced by U.S. companies — and other commodities to European markets; in fact, in 2022, shipments of Tengizchevroil oil via the Russia-controlled Caspian Pipeline Consortium was disrupted four times. Given its long border with Russia and membership in the Eurasian Economic Union, Kazakhstan's compliance with Western sanctions on Russia has been crucial to their effectiveness.

To demonstrate U.S. support, then-President Biden convened the very first summit with the five Central Asian presidents on the sidelines of the UN General Assembly in New York in September 2023. Additionally, Secretary of State Antony Blinken visited Kazakhstan and Uzbekistan in February 2023. While the administration could only allocate limited resources, they distributed \$50 million for the Economic Resilience Initiative in Central Asia (ERICEN) to expand trade routes, bolster the private sector, and invest in people through training and education.

The second Trump administration has made drastic changes to U.S. foreign policy. While Kazakh policymakers welcomed the dismantling of agencies that had actively promoted democratization and human rights, particularly LGBTQ rights, they are worried about the prospect of a reduced U.S. presence and fewer commitments in Europe and Eurasia. Like other countries worldwide, Kazakhstan was affected by Washington's withdrawal from international agreements, organizations, and initiatives.

Kazakhstan's abundant natural resources and skillful diplomacy have helped put it on the Trump administration's mental map. In March 2025, President Tokayev spoke by phone to President Trump to discuss bilateral cooperation and the Russia-Ukraine war. In November, Tokayev visited the White House for a bilateral meeting with Trump and the joint C5+1 summit. During the visit, the two countries signed a number of deals and agreements totaling approximately \$17 billion, including a \$1.1 billion agreement to develop tungsten mining and processing and \$3.7 billion in partnerships with U.S. technology companies (NVIDIA, HP, Cisco, GDA, Joby Aero Inc, Oracle, and Starlink).⁴⁸ In a follow-up December call, Trump invited Tokayev to attend the December 2026 G20 summit in Miami. Tokayev also accepted Trump's January 2026 invitation to join his Board of Peace, a 60-country intergovernmental organization proposed by the United States to support the administration, recovery, and reconstruction of the Gaza Strip. It remains to be seen whether Kazakhstan's proximity to China and its rich natural resources, including uranium and critical minerals, can help maintain U.S. interest going forward.

Salient Issues

Kazakhstan's current foreign policy priorities with global implications can be grouped into four areas:

1. Trade and transport: How can Kazakhstan diversify and develop its trade and transport routes while managing and reducing dependencies on Russia as a transit country for oil, uranium, and other commodities bound for Western markets?
2. Energy and climate: How can Kazakhstan develop the energy sector in a way that is compatible with the country's balanced foreign policy and decarbonization goals?

3. Digital technology: How can Kazakhstan navigate technological fragmentation between China and the West?
4. Nuclear nonproliferation: How can the country promote nuclear nonproliferation and ensure its security amid weakening of the Treaty on the Non-Proliferation of Nuclear Weapons (NPT) regime?

Trade and Transport Connectivity

The split between Russia and the West, combined with the growing U.S.-China rivalry, has created significant challenges for Kazakhstan's trade and transport connectivity. The need to reduce dependence on Russia as a transit route for oil, uranium, and other commodities bound for Western markets spurred the Kazakh government's efforts to develop the Middle Corridor. If the corridor proves well-functioning and competitive, it could be a game-changer for the countries and regions along the route. However, logistical, political, geoeconomics obstacles remain significant.

The Middle Corridor, also called the Trans-Caspian International Transport Route, began to coalesce when the railway companies of Azerbaijan, Georgia, and Kazakhstan signed an agreement to form a coordination committee in November 2013. Despite improvements in infrastructure, the corridor was considerably more expensive and less reliable than the Northern corridor passing through Russia. However, Russia's war against Ukraine made the latter risky and unattractive for many Western companies. As a result, in 2023, cargo transportation along the Middle Corridor increased by 88% over the same period in 2022.⁴⁹

Over the past few years, there has been a flurry of activity aimed at developing infrastructure, aligning regulations, and reducing tariffs along the Middle Corridor to make the route more attractive for investors and shipping companies. In 2022, Kazakhstan signed roadmaps with Azerbaijan, Georgia, and Turkey to address bottlenecks until 2027. One year later, the national railway companies of Kazakhstan, Azerbaijan, and Georgia formed a joint venture to develop multimodal transport services. Established by KazMunayGas and Abu Dhabi Ports Group, the venture has acquired four tankers to cross the Caspian Sea and plans to expand the fleet in the Caspian and beyond.

Importantly, the EU adopted a new strategy for Central Asia in 2019, prioritizing transport, energy, and digital connectivity with the region. This increased focus reflected the bloc's decision to launch its own global infrastructure development initiative, the Global Gateway, to compete with China's BRI. Decoupling from Russia further raised the Middle Corridor's importance and boosted willingness to invest. In 2024-2025, Brussels committed around \$14 billion to its development. The United States has also signaled its support for the Middle Corridor in bilateral and C5+1 documents, though practical engagement remains limited.

China's interest in the corridor is less acute than that of Kazakhstan or European countries. Prior to 2022, Beijing was skeptical of the challenging multimodal route, viewing it as more expensive and less predictable compared to the Northern corridor through Russia. It may also have been reluctant to rattle Moscow at a time when the two countries were getting closer. Since the beginning of the Russia-Ukraine war, however, China has taken steps to show its readiness to support the project.⁵⁰

In 2023-2024, China and Kazakhstan signed a series of agreements on the Middle Corridor, aimed at creating favorable conditions for transporting goods, developing logistics centers in the two countries' territories to attract additional transit, exchanging data on tracking rolling stock, and more. Beijing also promised to assist with financing the oil pipeline and port infrastructure projects of the Trans-Caspian International Transport Route. Kazakhstan Temir Zholy and Lianyungang Port Group agreed to jointly invest in the construction of

a container hub at the Port of Aktau on Kazakhstan's Caspian coast. The project aims to improve both the effectiveness of the port's existing infrastructure and the processing of container cargoes shipped through Kazakhstan.

Thus, both China and the United States are willing to support the Middle Corridor, driven in part by a shared interest in helping Kazakhstan and other Central Asian countries diversify their trade and transport routes away from Russia. For both, however, the project is not a top priority and does not constitute an area of intense competition.

While Kazakhstan has made a major bet on the Middle Corridor, policymakers and business leaders are fully aware of its current deficiencies and are searching for ways to address them. For example, Kazatomprom, the country's national operator for the export and import of uranium and its compounds, has encountered problems shipping uranium via the Trans-Caspian route and is considering sending it to Western markets via China.⁵¹ In 2023, China National Nuclear Corporation (CNNC) opened a bonded uranium warehouse on the Chinese-Kazakh border to store Kazakh shipments. The plan is to develop a global uranium trading hub that will rival Western ones. If this materializes, Kazakh uranium could potentially reach Western markets via China.

Overall, Kazakhstan's efforts to diversify its trade routes are changing Eurasia's geoeconomic landscape, bridging Europe and Asia and multiplying trade options. The Middle Corridor is also altering the geopolitical context, creating a stronger foundation for the sovereignty of post-Soviet states in Central Asia and the South Caucasus by lessening their traditional dependence on Russia. The state of EU-China relations will be an important factor: if the two powerhouses grow closer — particularly as Europeans, disgruntled with Trump administration policies, hedge away from the United States — they will have more incentives to develop the Middle Corridor.

Energy and Climate

Similar to other oil- and gas-producing middle powers, such as Canada, Brazil, and Saudi Arabia, Kazakhstan seeks to fully capitalize on its resources by growing its production and exports while also successfully pursuing an energy transition that brings more renewable and alternative energy sources.⁵² The country's goals include satisfying growing domestic energy needs, raising export revenues, and decarbonizing the economy. Pursuing these ambitious goals is closely interlinked with the increasingly complex and challenging geopolitical and geoeconomic environment.

The oil and gas sector has long been the backbone of Kazakhstan's economy, with crude oil and oil products accounting for 52.5% of all exports in 2024. In line with the country's multivector foreign policy, Kazakh policymakers have sought to diversify investment in this sector, attracting U.S., European, Russian, Chinese, Japanese, and other companies. Western and Russian companies had an initial advantage, signing early production sharing agreements for the largest fields, such as Tengiz, Karachaganak, and Kashagan. Later, Chinese companies entered the sector, gradually accounting for about a quarter of total oil production. The government is applying the same approach to the development of renewables, critical minerals, and nuclear energy.

Kazakhstan has great potential to generate solar and wind power across its vast territory. The official goal is to source 15% of its electricity from renewable energy by 2030, source 50% of its electricity from renewables and alternative sources (including nuclear energy) by 2050, and achieve carbon neutrality by 2060.⁵³ Given

that China is a global champion in solar and wind technologies, it is not surprising that Chinese companies became Kazakhstan's key partners in the sector, followed by companies from France, Germany, and Italy. More recently, Saudi Arabia's ACWA Power and the Emirati firm Masdar have made multibillion-dollar investments in wind power and battery storage facilities.

A similar dynamic is evident in Kazakhstan's nascent nuclear energy sector. As the world's leading producer of uranium, Kazatomprom has long worked on developing the nuclear fuel cycle from uranium extraction to the production of nuclear fuel pellets, with the exception of enrichment. Kazakhstan made a conscious decision not to develop enrichment capacity due to its commitment to nonproliferation.⁵⁴ The government has long viewed the production of nuclear energy as the next logical step. Until recently, all plans to this end were met with strong public opposition and consequently put on hold. However, the Tokayev administration, driven by the need to meet growing energy demands while honoring commitments to decarbonize the economy, ultimately decided to push the project forward. In October 2024, a national referendum on nuclear energy approved plans to build a nuclear power plant on the bank of Lake Balkhash in east-central Kazakhstan.

The project's main contenders included Russian Rosatom, Chinese CNNC, South Korean Korea Hydro & Nuclear Power, and French Électricité de France. While the government insisted that the winner was chosen based solely on costs and technology, geopolitical factors clearly played a role. Choosing Rosatom would have tied Kazakhstan's nuclear energy sector even more tightly to Russia's, strengthening dependence on Russian technologies and exposing the country to Western sanctions. However, not choosing Rosatom risked offending Moscow. On the other hand, choosing CNNC would strengthen Kazakhstan's blossoming strategic partnership with China in the nuclear energy sector. In 2021, Kazatomprom and China General Energy Nuclear Power Company (CGNPC) established a joint venture producing low-enriched uranium assemblies — using French production technology — for Chinese nuclear power plants.⁵⁵ The Kazakh government's solution to this dilemma reflects the country's multivector foreign policy approach: in summer 2025, it announced Rosatom as the winner of the competition to build the first nuclear power plant, while CNNC will construct the second and third plants.⁵⁶

The government is also considering the introduction of Small Modular Reactors (SMRs). Russia and China are currently leading the global SMR development race and are therefore well positioned to capture Kazakhstan's market.⁵⁷ However, Kazakhstan's predisposition to diversification creates opportunities for U.S. projects, provided they are competitive. After partnering with the U.S. State Department's Foundational Infrastructure for the Responsible Use of SMR Technology (FIRST) program in 2022, the two countries agreed to launch an SMR feasibility study, a regional training hub to facilitate SMR deployment across Central Asia, and an SMR classroom simulator for workforce development in December 2025.⁵⁸ Through domestic diversification, Kazakhstan can contribute to a more balanced global nuclear energy market.

Digital Technology

Kazakhstan has an ambitious digital transformation agenda: it wants to be well connected both domestically and globally while actively participating in the global AI ecosystem.⁵⁹ Achieving this agenda requires it to navigate the complex landscape of technological fragmentation and make quick decisions with long-term implications.

In the digital sphere, China and Kazakhstan's partnership is flourishing. Highly competitive Chinese information and communications technology (ICT) companies, most prominently Huawei and Dahua, have a strong footprint in the country. Huawei works closely with the government and local telecom operators, helping

them deploy LTE and 5G technologies, as well as developing cloud services and building data centers. The company also actively invests in education: a network of Huawei ICT Academies trains students and supports local personnel throughout the country. Meanwhile, Dahua is a partner in the development of video surveillance and traffic control systems in Kazakhstan's cities.⁶⁰

China and Kazakhstan's cooperation is facilitated by the two countries' common attitudes and approaches in the digital sphere. Both are techno-optimists, pushing for the rapid and comprehensive roll-out of new technologies. Furthermore, both share a state-centric approach to digital governance. In 2015, Kazakhstan, China, and other Shanghai Cooperation Organization member states co-sponsored a "Code of Conduct for Information Security," submitted to the UN General Assembly. The code underlined the states' "right to independent control of information and communication technologies" and the role of the state in "encouraging a deeper understanding by all elements in society, including the private sector and civil-society institutions, of their responsibility to ensure information security."⁶¹

While Chinese companies hold a very strong presence in Kazakhstan's digital market, there is still room for competition. Western governments and companies, and increasingly non-Western ones as well, are active players. Driven by the multialignment and diversification imperative, Kazakhstan welcomes their engagement.

As a result, digital transformation is a top priority for EU-Kazakhstan cooperation. In 2022, the European Commission launched a Digital Connectivity Initiative for Central Asia, under the umbrella of its Global Gateway strategy. The initiative aims to improve internet access and reliability in Kazakhstan and three other Central Asian countries by positioning satellite-connected earth stations with integrated Internet Exchange Points and green data centers across the region.⁶²

Together with Azerbaijan, Kazakhstan is building a fiber-optic cable across the Caspian Sea that will connect the two countries to Europe. It is intended to become the "hyper-backbone" of the international data flow corridor between Europe and China. The project itself is not new and was originally slated for completion by 2021. However, prior to the Ukraine war, progress had stalled due to the difficulty of attracting investors for this technologically challenging and expensive project that mainly supplemented the capacity of existing land cables via Russia and China. Today, the cable's price is perceived as worthwhile to ensure the resilience and strength of digital infrastructure.

In terms of data regulation, Kazakhstan looks to the EU. The country's Law on Personal Data and Its Protection is generally modeled after the EU General Data Protection Regulation (GDPR), although it omits two important principles: accountability (data controllers are responsible for actively demonstrating their compliance) and data minimization (personal data shall be adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed).⁶³ Kazakhstan's Concept of Digital Transformation, Development of ICT Sphere and Cybersecurity for 2023-2029 envisions joining the Council of Europe's Convention for the Protection of Individuals with regard to automatic processing of personal data, ensuring the rights of Kazakhstan's citizens are not breached by operators residing in the countries that signed the convention.⁶⁴

U.S.-Kazakhstan digital cooperation mainly focuses on U.S. large technology companies, such as Apple, Google, and Microsoft. The Kazakh government has sought to attract them to the country and make Kazakhstan a hub for their Eurasian operations. To strengthen ties with Silicon Valley, Kazakhstan opened a consulate general in San Francisco.

While competition from Chinese companies is fierce, U.S. firms such as Cisco and Juniper benefit from early access to Kazakhstan's market in the 1990s, supplying equipment for the core and core-to-network infrastructure of the national telecom company Kazakhtelecom.⁶⁵ They also enjoy greater trust than Chinese

companies, giving them a better chance of being involved in projects involving sensitive information.

Kazakhstan's roster of digital partners continues to grow, but the UAE and Singapore play a special role. Abu Dhabi-based Presight AI, specializing in data analytics, software development, and innovative technological solutions, is Kazakhstan's partner in establishing a supercomputer cluster. In 2025, Kazakhstan's Ministry of Digital Development received its first supercomputer equipped with NVIDIA graphic processors.⁶⁶ Another Abu Dhabi company, AIQ, is slated to help Kazakhstan's national oil and gas companies use AI tools to enhance their productivity. The Singapore Cooperation Programme provides training on various aspects of digital transformation for Kazakh government officials, while Surbana Jurong, specializing in integrated smart city solutions, is developing a master plan for the G4 City project. Additionally, PSA International supports digitalization of the Middle Corridor, and GK Hyperscale Ltd plans to participate in the construction of two data centers.

Kazakhstan's digital policy is driven by the goal of quick and comprehensive transformation. China has the will and capacity to be its prime partner in this effort. However, the national security logic of diversification motivates Kazakhstan's efforts to develop partnerships with the West and other digitally advanced middle powers. While there is room to maneuver at this stage, this flexibility may lessen if technological decoupling between the United States and China continues. Kazakhstan can play a limited role in mitigating such decoupling by working with like-minded countries that view forced alignment as damaging for their economies.

Nuclear Nonproliferation

Over the past several decades, Kazakh policymakers have grown critical of inequalities within the global nonproliferation regime. While nuclear-weapon states have failed to deliver on their commitments to denuclearize under the Treaty on the Non-Proliferation of Nuclear Weapons (NPT), non-nuclear states continue to face obstacles in developing peaceful nuclear energy.⁶⁷ Now, Kazakhstan is deeply concerned about the near-complete reversal of post-Cold War trends toward mutual trust, disarmament, and nonproliferation. Moreover, Kazakhstan can no longer rely on the Budapest Memorandum, under which the United States, the United Kingdom, and Russia provided security assurances to Ukraine, Belarus, and Kazakhstan in return for their decision to denuclearize; the document proved hollow in 2014, when Russia annexed Crimea.

At present, Kazakhstan, together with like-minded countries, advocates for negative security assurances from by nuclear powers to non-nuclear states. It insists that without such assurances — commitments by nuclear powers not to use nuclear weapons against non-nuclear states — the NPT regime is in danger of falling apart.⁶⁸ In this context, Kazakh policymakers have sought to convince U.S. partners to ratify the Protocol to the Treaty on a Nuclear-Weapon-Free Zone in Central Asia. Although the Obama administration signed the Protocol in 2014 and recommended its ratification by the Senate, ratification has not yet occurred, while the other four nuclear powers, including China, have already ratified it. Kazakhstan also continues to promote the Comprehensive Nuclear-Test-Ban Treaty and the Treaty on the Prohibition of Nuclear Weapons.

Conclusions and Recommendations

Kazakhstan's recent self-identification as a middle power is a logical continuation of its foreign policy over the past three decades. It has been a staunch multilateralist, eager to contribute to global peace and sustainable development. Kazakh policymakers have mastered the so-called multivector foreign policy, a

hedging strategy centered on multialignment: the simultaneous pursuit of strategic partnerships with Russia, the United States, the EU, China, Turkey, and others. Kazakhstan engages these partners both bilaterally and through multilateral institutions, aiming to steer Eurasian geopolitics away from sharp divisions and fragmentation.

At present, Kazakhstan is pursuing a “double-hedging” act, leaning more toward China to hedge against Russia, and leaning more toward Turkey, the EU, the United States, the Gulf countries, Japan, and South Korea to hedge against overdependence on both China and Russia. By softly balancing different “vectors” and calibrating its partnerships, Kazakhstan preserves strategic flexibility and gains from diversified cooperation.

This approach is not risk-free, particularly in terms of relations with Russia, which has grown increasingly impatient with Kazakhstan’s “unfriendly gestures.”⁶⁹ However, there is no obvious alternative, and this policy foundation is not contested domestically. The multivector foreign policy is deeply embedded and perceived as a defining feature of Kazakhstan’s identity as an independent state. Barring dramatic external or internal shifts, the country is likely to stay the course. In the meantime, domestic actors favoring the Russian, Turkish, or Western vector will seek to influence how these relationships are calibrated.

While Kazakhstan is accustomed to balancing relations with Russia and the United States, managing the China-U.S. rivalry is an emerging challenge. Kazakh policymakers prioritize partnerships with both countries. China is a benevolent regional power and geographic neighbor, and the two governments share views on many global governance issues. However, Astana continues to resist full alignment and would resist any slide into becoming Beijing’s client state. The European and Muslim components of Kazakhstan’s identity will continue to work toward balance, with the United States viewed as the most valuable partner in this effort. If Washington is willing to play this role, Kazakhstan’s deep commitment to the relationship will remain.

At the same time, it is unclear what a new U.S. policy toward Kazakhstan — and Eurasia more broadly — will look like. While active U.S. engagement can no longer be taken for granted, several factors are likely to sustain U.S. attention, including the determination to contain China and interest in critical materials and uranium. The relationship is also likely to become more transactional and less linked to human rights and democracy.

To maintain its balancing act amid growing great-power animosities, Kazakhstan is increasingly relying on relations with other middle powers. It sees them as like-minded partners in promoting global trade and transport connectivity, advancing the green transition, and pursuing digital transformation.

Growing cooperation and connectivity within and among regions, led increasingly by middle powers, has become a defining trend. Kazakhstan and Uzbekistan, the two leading countries in Central Asia, are working in tandem to promote Central Asian regional cooperation, cohesion, and international standing. If they are successful and the region “comes of age,” Central Asia could play a constructive role in Eurasian geopolitics and geoeconomics, acting in concert with the Gulf and ASEAN regions.

Kazakhstan’s foreign policy makes it an international “force for good.” It has a global outlook and is eager to contribute to global security and sustainable development in cooperation with like-minded partners. Kazakhstan’s skillful balancing of “strategic partnerships” with great powers through multialignment and diversification of economic relations mitigates rather than exacerbates the great-power rivalries. Like other hedging middle powers, it is interested in softening divides and preventing global market fragmentation.

Much will depend on how the China-U.S. relationship unfolds and whether their rivalry grows into a more acute and zero-sum competition. To avoid such an outcome, which would be damaging for all, the following recommendations are offered for the American and Chinese governments:

1. Given that choosing the United States over China is not a plausible option for Kazakhstan — and that embracing China at the expense of relations with the West is equally— it would be prudent for both powers to accommodate Kazakhstan’s balancing act rather than seek exclusive alignment.
2. While both China and the United States may have some doubts about the benefits of the Middle Corridor — China might view investing as costly and uncertain, while the United States may be wary of strengthening China’s role in Eurasia — both should continue their support of the initiative. Each country has an interest in Kazakhstan, and the rest of Central Asia more broadly, maintaining sovereignty vis-à-vis Russia.
3. For their own benefit and global stability, China and the United States should explore areas for selective cooperation with and in Kazakhstan, such as nuclear nonproliferation and sustainable development, including biosafety, water management, and emissions reduction.

Kazakhstan’s ability to maintain its foreign policy course will depend on the agility of its diplomacy and domestic political and economic conditions. The following recommendations are offered to Kazakh policymakers:

1. Kazakhstan should make full use of the window of opportunity created by the Russia-Ukraine war to strengthen its international standing by developing strategic partnerships with the EU, Japan, South Korea, and hedging middle powers in Eurasia, Asia, the Gulf region, and beyond. Efforts to promote regional cooperation and cohesion in Central Asia will complement this effort.
2. While accelerating the development of the Middle Corridor is crucial, the urgency should not come at the expense of proper planning and implementation of other large infrastructure projects. Moving too quickly risks creating costly underused assets – so-called “white elephants” – and leaving significant gaps in the national budget.
3. To maintain an open and diversified investment environment, Kazakhstan should continue to develop its regulatory and commercial environment so that American, Chinese, and other foreign investors view the country as an attractive place to do business.
4. Kazakhstan should carefully observe and analyze technological fragmentation trends and take measures to mitigate their effects through both national policies and multilateral coalition-building.
5. To succeed as a middle power, Kazakhstan must build its knowledge base. Smart investments in R&D, professional public service, and region-specific expertise will strengthen the country’s capacity to navigate technological transitions, manage the increasing geopolitical and geoeconomic complexity, and play a constructive regional and global role.

Statements and views expressed in this commentary are solely those of the authors and do not imply endorsement by Harvard University, the Harvard Kennedy School, or the Belfer Center for Science and International Affairs.

Endnotes

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