



MULTI-VECTOR DIVERSIFICATION: KAZAKHASTAN'S TRANSNATIONAL FUTURE

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Abstract:

The recent election of the Republic of Kazakhstan as a non-permanent member of the UN Security Council gives the country an opportunity to participate more directly in shaping regional and global energy, economics, and security. A multi-vector and balanced foreign policy will allow Kazakhstan to strengthen regional security and enhance integration processes with Central Asian states. Kazakhstan can contribute to regional energy security, counterterrorism, nuclear nonproliferation, and other goals. Kazakhstan is among a few countries in the Eurasian region where primary energy production significantly exceeds energy consumption. The country also has striven to reduce regional tensions and terrorism. Meanwhile, non-proliferation has since independence has come to represent the organizing principle of the country's cooperative foreign policy, one that seeks independence through simultaneous engagement with external powers

Keywords: Kazakhstan, Energy, Oil, Gas, Nuclear proliferation

Título en Castellano: La diversificación de múltiples vectores: El futuro transnacional de Kazajstán

Resumen:

La reciente elección de la República de Kazajstán como miembro no permanente del Consejo de Seguridad de las Naciones Unidas da al país la oportunidad de participar más directamente en la conformación de la energía, la economía y la seguridad regionales y mundiales. Una política exterior multivector y equilibrada permitirá a Kazajstán fortalecer la seguridad regional y mejorar los procesos de integración con los Estados de Asia Central. Kazajstán puede contribuir a la seguridad energética regional, al contraterrorismo, a la no proliferación nuclear y a otros objetivos. Kazajstán es uno de los pocos países de la región euroasiática donde la producción de energía primaria excede significativamente el consumo de energía. El país también se ha esforzado en reducir las tensiones regionales y el terrorismo. Entretanto, la no proliferación ha llegado a representar el principio organizador de la política exterior cooperativa del país, que busca la independencia mediante el compromiso simultáneo con las potencias externas

Palabras clave: Kazajstán, Energía, Petróleo, Gas, Proliferación nuclear

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1. Introducción

Kazakhstan is among a few countries in the Eurasian region where primary energy production significantly exceeds energy consumption. For taking advantage of their country's resource abundance, Kazakh authorities have prioritized security of demand for its energy and earning revenues, to deepen access with external markets. Moreover, unstable energy supplies within the Central Asian energy system over the last several years have forced Kazakhstan to strengthen its independent and self-sustaining energy system, while sustaining intra-Central Asian energy trade. However, even though Kazakhstan has succeeded in boosting its energy production capacity, and has been prioritizing export diversification in its energy policies, various dependencies threaten the country's energy security and other national interests.

In an attempt to spur economic growth and emerge from an economic crisis in the early 1990s, Kazakh authorities have been promoting development of their oil and gas sector. Kazakhstan opened up its market to international energy companies: energy giants such as Chevron, Texaco, ExxonMobil, Agip/Eni, Royal Dutch Shell, British Group, TotalFinaElf, and Impex immediately penetrated the market. The second and third waves of investors saw many Canadian, Middle Eastern, Russian, as well as Chinese and Indian energy companies enter Kazakhstan's oil and natural gas sector as well.

Having engaged in close interactions with external energy actors for over a quarter-century, four major dependencies have emerged, which currently threaten Kazakhstan's national interests in the oil sector:

- a) The national energy company owns only one-fifth of the energy resource extraction industry, while over 50 percent belongs to Chinese and American companies alone. Having signed production sharing agreements in the early 1990s, Kazakh authorities lost control over both extraction of resources and transportation of energy to external markets—strategic sectors which deeply affect the country's economic and energy security. Perceiving the production sharing agreements signed with international oil giants in the early 1990s as unfair, Kazakh authorities have attempted to regain control over the country's natural resources by reversing those agreements and diversifying their energy export routes.² However, by granting production sharing agreements to rapidly-emerging new player, China, Kazakhstan is further increasing these vulnerabilities vis-à-vis external actors.
- b) Having boosted oil production, Kazakhstan has become highly dependent on the export of oil, which currently accounts for 73 percent of total exports.³
- c) Kazakhstan is largely dependent on a single customer: European consumers import around 75 percent of Kazakhstan's crude oil. The following are Kazakhstan's main importers: Italy – 18 percent; China – 12 percent; The Netherlands – 11 percent; Russia – 10 percent; France – 6 percent; etc.⁴
- d) Almost all of the crude oil exported to Europe passes through the territory of Russia, and is transported largely via pipeline networks. In 2015, Kazakhstan exported 72,077 million tonnes of oil and gas condensate through the Atyrau–Samara pipeline (15.7 million tons per year), the Caspian Pipeline Consortium (42.7 million tons per year, including 38 million tons of Kazakhstani oil), and the Atasu–Alashankou pipeline (11.8 million tons per year).⁵ The Atyrau–Samara Pipeline and the Caspian Pipeline

² Cohen, Ariel: *Kazakhstan: The Road to Independence: Energy Policy and the Birth of a Nation* (Uppsala: Silk Road Studies Program, Institute for Security and Development Policy, 2008), p. 119.

³ "Kazakhstan Exports," *Trading Economics*, at <http://www.tradingeconomics.com/kazakhstan/exports>.

⁴ *Ibid.*

⁵ "The 11th National Report: On implementation of the Extractive Industry Transparency



Consortium both pass through and are controlled by Russia, making Kazakhstan vulnerable to export demand insecurity—the threat of the unilateral import disruption by a single country that may significantly affect the producing state.

However, dependencies in the oil sector are not the only factors threatening energy security (and, as a consequence, the economic interests of Kazakhstan).

2. Reaching New Gas Markets

As a landlocked country, Kazakhstan, like other regional exporters, has very limited access to global energy markets, and is already directly connected to two major customers—Russia and China. These major regional powers perceive Kazakhstan as a source of energy, and are primarily interested in moving resources out. Kazakhstan consumes only half of the gas it produces, and exports the other half because it lacks extensive internal gas supply networks to transport energy from resource-rich regions to distant population centers. The multi-vector and export oriented energy policy currently prioritized by the government does not address major risks associated with dependencies on both the exporting and importing of indigenous natural gas.

Kazakhstan possesses significant gas reserves, in the amount of somewhere between 1.5⁶ and 1.9⁷ trillion m³ (according to different sources), and has the second largest natural gas reserves in the region (Turkmenistan has the largest reserves in the region). Kazakhstan's "reserves-to-production ratio" for natural gas is 75 years. Around 74 percent of the gas condensate reserves are located in the Karashaganak field, which is also the largest field in the country.⁸ It produces an average of 40 billion m³ of gas annually, of which over 20 billion m³ is market gas, supplied for domestic consumption and exported to external markets. The other half of the gas is pumped back into oil wells to enhance oil production. The Karashaganak deposit is the largest contributor to the gas production in Kazakhstan (8.5–9 billion m³ per year). However, over 90 percent of the gas produced in Karashaganak is delivered to the Orenburg gas processing plant in Russia.⁹ While more than half of the processed gas is returned to Kazakhstani customers, such dependence on Russia threatens the energy security interests of the country.

Kazakhstan consumes only half of its produced gas and exports the other half, because it lacks extensive internal gas supply networks to transport within the country. Gas shortages in the South Kazakhstan region—the most populated region in the country—are compensated by swap deals with Uzbekistan. Imports from Uzbekistan account for around 30 percent of the natural gas consumption in the South Kazakhstan region. To reduce such dependence, authorities are counting on a domestic pipeline network to move indigenous gas from the energy-producing regions of Western Kazakhstan and Kyzylorda to the major gas-consuming regions Shymkent and Almaty. The Beineu–Bozoy–Shymkent pipeline is designed to provide such connections. The government believes that once implemented, this project will ensure

Initiative in the Republic of Kazakhstan for 2015," *EITI*, (2015), 56.

⁶ British Petroleum Company, *BP Statistical Review of World Energy June 2015* (London: British Petroleum Co., 2015), at www.bp.com/en/global/corporate/energy-economics/statistical-review-of-world-energy.html.

⁷ Eni, *World Oil and Gas Review for 2014* (Rome: September 2014), <https://www.eni.com/world-oil-gas-review-2014/sfogliabile/O-G-2014.pdf>.

⁸ "The 11th National Report: On implementation of the Extractive Industry Transparency Initiative in the Republic of Kazakhstan for 2015," *EITI*, (2015), pp. 40, at https://eiti.org/sites/default/files/documents/national_reports_fot_eiti_2015_eng.pdf.

⁹ Pirani, Simon "Central Asian and Caspian Gas Production and the Constraints on Export," *Oxford Institute for Energy Studies* (2012), pp 45, at http://www.oxfordenergy.org/wpcms/wp-content/uploads/2012/12/NG_69.pdf.



full gasification of 13 out of 16 regions by 2030 and increase the volume of household consumption from 10.9 to 18 billion m³.¹⁰ The first section of the pipeline—Bozoy–Shymkent was launched in September 2013; the second section was completed in 2015. Kazakhstan’s multi-vector foreign energy policy poses a major challenge to achieving self-sufficiency and enhancing the nation’s energy security. The Beineu–Bozoy–Shymkent gas pipeline, capable of supplying its gas to southern regions, is also expected to fill the Central Asia–China gas pipeline; in which China has not only taken part, but also covered most of the construction expenses. Chinese interests in moving gas out of the region may overshadow Kazakhstan’s desire to supply a sufficient amount of gas to its southern regions. As a result, any attempt to keep up with external demand threatens the level of energy security in the country.

In this regard, the level of energy security in Kazakhstan, specifically in the natural gas sector, depends on authorities’ ability to balance export-oriented energy policy priorities, meeting domestic energy needs, as well as taking full advantage of the existing pipeline networks within the following gas corridors:

1. “Central Asia Center” pipeline, with the capacity of 60.2 billion m³;
2. “Bukhara-Ural” pipeline, with the capacity of 8 billion m³;
3. “Orenburg – Novopskov” pipeline, with the carrying capacity of 14.6 billion m³;
4. “Kazakhstan-China” pipeline (A, B and C lines), with the capacity of 55 billion m³;
5. “Zhanaozen-Aktau” pipeline, with the carrying capacity of 2.8 billion m³;
6. “Beineu-Bozoi-Shymkent” pipeline, with the capacity of 2.5 billion m³;
7. “Bukhara gas-bearing area – Tashkent–Bishkek–Almaty”, with the capacity of 5.8 billion m³.¹¹

Kazakhstan is a major electricity producer, consumer, and exporter in Central Asia. Kazakhstan’s electric power grids operate in parallel with both Russian and the unified Central Asian electric power systems. It is divided into three zones: the northern zone (Akmola, Aktube, Kostanay, Pavlodar, North-Kazakhstan, East-Kazakhstan, Karaganda); the southern zone (Almaty, Zhambyl, Kyzylorda, South–Kazakhstan); and the western zone (Atyrau, Mangystau, and West–Kazakhstan regions). The southern zone is connected to the electric power grids of Uzbekistan and Kyrgyzstan. Northern regions are supplied with electricity from cheap Ekibastus coal-fired TPP. While the northern zone produces 72.7 percent of the total electricity in the country, there is a growing demand despite significant production capacity. The northern zone operates in parallel with Russian electric power grids connected via 220–500–1050 kV transmission lines. The north–south 500 kV transmission line was built in 1998 to cover the peak electricity needs of the southern regions of Kazakhstan, and to secure itself from unilateral supply cuts from the electric power grids of Uzbekistan. It is also expected that a 500-kv transmission line, with the capacity of 1000 MW, will be built to move electricity from coal-rich Ekibastuz to China.¹² Most importantly, however, Kazakh authorities are interested in regulating electric power supply relationships with Russia and Kyrgyzstan, the two largest counterparts in the power export-import relations -these nations also happen to be members of the Eurasian Economic Union (EEU).

¹⁰ Government of the Republic of Kazakhstan, *Koncepciya Razvitiya Gazovogo Sektora Respubliki Kazaxstan do 2030 Goda (Gas Sector Development Concept of the Republic of Kazakhstan until the period of 2030)*, *Online.zakon.kz*, 5 December 2014, at http://online.zakon.kz/Document/?doc_id=31641775.

¹¹ “Transport Infrastructure,” *KazMunaiGaz*, (January 2016), at www.kmg.kz/en/manufacturing/gas/infrastructure/.

¹² Adilet legal portal, *O Programme Razvitiya Elektroenergetiki do 2030 Goda (On the Program on Electric Power Development Until 2030)*, Adilet.zan.kz, (2010), at <http://adilet.zan.kz/rus/docs/P990000384>.



3. Multi-Vector Energy Policy Within the Eurasian Economic Union

As a successor of the Eurasian Economic Community (EurAsEC) and the Customs Union (CU), the EEU inherited a mechanism designed to regulate a wide range of intergovernmental relations, including within the energy sector. The remaining unresolved and pressing issue is the free movement of some particular types of energy resources. It was expected that the next stage of economic integration, which was the CU of Belarus, Kazakhstan and Russia of 2010,¹³ would turn plans to liberalize energy markets into reality. Although, to a certain extent, barriers preventing the free movement of resources have been eliminated, neither the EurAsEC nor the CU succeeded to develop an effective regional mechanism for regulating the energy trade. Russia, the strongest supporter of economic integration, confronted the formation of common energy markets, which bore an additional financial loss.

Since Kazakhstan is both an importer and exporter of energy resources, its foreign energy policy differs depending on the positions it takes. Within the CU, Kazakhstan, as an importer of energy resources, voted for the liberalization of oil, gas, and electricity markets, which would allow it to import oil products and electricity without customs tariffs from Russia. However, out of 140 products of the Group 27, only six of them do not fall under the regulation of the Union, including natural gas in a gasified form, crude oil and oil products, and electricity.¹⁴ This condition implies that neither Belarus nor Kazakhstan enjoys free access to the Russian energy market, and the possibility to transit electricity and oil products is limited. Having placed strategic interest in energy resources for use as instruments to influence the Union members and potential candidates, along with the fact that this earns high revenue from customs fees, Russia is not willing to liberalize its energy market yet.¹⁵

The terms of the EEU came into force on January 1, 2015. Within the EEU, framework member states will use a single-mechanism regulating economy for several purposes: harmonize their legislation, create unified energy, transport, and communication infrastructure, create a coordinated tax system, and create a trade and customs policy aimed at ensuring the free movement of goods, services, capital, and labour force. However, the concept of establishing common energy markets was adopted in 2016, and the program will be fully developed by 2018. It is also expected that the common electricity market of the EEU will be formed by 2019, and its oil and gas market only in 2025. The liberalization of energy markets should be accompanied by a harmonization of the laws between the Union member states, and the establishment of supra-national financial centres to implement regional-level energy projects.¹⁶ Though the Russian government applies preferential energy pricing and a customs tariff-free policy toward members of the Union, in the absence of an effective/multilateral mechanism designed to ensure free movement of energy resources, most of the EEU member states will remain vulnerable. And there should be a good reason for

¹³ Ministry of Foreign Affairs of the Republic of Kazakhstan, *The Customs Union and the Common Economic Space of the Republic of Belarus, the Republic of Kazakhstan and the Russian Federation*, Astana: Mfa.kz, (2015), at <http://www.mfa.kz/index.php/en/foreign-policy/integration-processes/customs-union>.

¹⁴ Eurasian Economic Commission, *Gruppa 27: Toplivo Mineralnoe, Neft i Produkty ix Peregonki; Bituminoznie Veshstva; Voski Mineralnie* (Group 27: Mineral Fuels, Oil and Products of its Distillation; Bituminous Substances; Mineral Waxes) (Moscow: Eurasian Economic Commission, n.d), at <http://www.tsouz.ru/db/ettr/PSN/Pages/psn27.aspx>.

¹⁵ Surkov, Nikolay: "Evraziyskiy Ekonomicheskiy Soyuz v Zamen Tamojennogo Soyuz (Eurasian Economic Union to Replace the Customs Union)," *RBTH*, 28 October 2013, at <http://rbth.co.uk/international/2013/10/28/eurasian-economic-union-to-replace-customs-union-31237.html>.

¹⁶ Eurasian Economic Commission, "Important Events in the Activity of the Department of Energy," (2014), at <http://eurasiancommission.org/ru/act/energetikaiinfr/energ/events/Pages/default.aspx>.



Russia to let the common energy markets of the EEU materialize: for example, keeping the Union afloat.

Kazakhstan's short and medium-term energy policy priority is diversification of its energy export routes; this lines up perfectly with the multi-vector foreign policy adopted by the government. While Kazakhstan has increased its bargaining power vis-à-vis external customers, and has earned extra revenue toward its budget generated through new energy markets, moving energy resources out has not directly contributed to the energy security of the country. This is the condition that states enjoy when they are confident they will have adequate and sustainable energy supplies for social and economic needs in the future. Kazakhstan remains highly dependent on several external customers within oil, gas, and electric power markets, creating extreme vulnerability. Moreover, despite prioritizing multi-vector and export routes diversification-oriented energy policy, Kazakhstan still suffers from excessive dependencies in the movement of resources to external markets, putting the ability to meet domestic energy needs at risk.

4. Terrorism

Kazakhstan has traditionally been viewed by Eurasian analysts as a relatively stable country with lower levels of terrorist activity in comparison to its southern neighbors, Uzbekistan and Kyrgyzstan. Since the collapse of the USSR, Central Asia has had a growing interest in political Islam, and has not been insulated from the coinciding militancy that has accompanied its rise in the Muslim world. The dynamics of the terrorist activities of radical Islamist militants within the territory of Kazakhstan are changing, but at a significantly lower rate than in other countries of the Central Asia Region.¹⁷

The primary catalyst for the rise of radical Islamic militancy in Kazakhstan has traditionally been ongoing conflicts and instability in Afghanistan. In 2004, the Kazakhstan government released a list of banned organizations classified as terrorist groups. Today, the list includes fifteen groups: "Al Qaeda", "The East Turkistan Islamic Movement", "The Kurdistan People's Congress (Kongra-Gel)", "The Islamic Movement of Uzbekistan", "Asbat al-Ansar", "The Muslim Brotherhood", "The Taliban Movement", "Boz Gourde" (Grey Wolves), "Jamaat Mujahideen of Central Asia", "Lashkar-e-Toiba", "The Social Reform Society", "Aum Shinrikyo", "The East Turkestan Liberation Organization", "The Islamic Party of Turkestan", and "Hizub-ut-Tahrir".¹⁸ Although not all of these groups are active in Kazakhstan, most operate within the Central Asia region. With the collapse of the Soviet Union, the rise of the Taliban, and the subsequent U.S. invasion of Afghanistan and Iraq after the 9/11 attacks, radical elements throughout the Middle East, North Africa, and the North Caucasus have migrated into the region: either to wage war with militant organizations opposed to the United States, and/or to develop the know-how and experience to mount operations against their own local regimes. In 2015, the current trends in Kazakhstan reflected radical Islamist militants leaving the country and migrating to join ISIL in Syria and Iraq.¹⁹

¹⁷ Daly, John C.K. "How Real Is The Jihadi Threat To Kazakhstan?," *Central Asia-Caucasus Analyst*, 17 September 2014, at <http://www.Cacianalyst.Org/Publications/Analytical-Articles/Item/13043-How-Real-Is-The-Jihadi-Threat-To-Kazakhstan?.html>.

¹⁸ "The List of Foreign Terrorist and Extremist Organizations, That Are Prohibited on the Territory of the Republic of Kazakhstan By The Court," *Agency For Religious Affairs of the Republic of Kazakhstan*, at http://www.Din.Gov.Kz/Eng/Press-Sluzhba/Spisok_Terroristicheskix_I_Jek/.

¹⁹ Michel, Casey. "Islamic State Video Features Ethnic Kazakhs" *The Diplomat*, 26 November 2014, at <http://TheDiplomat.Com/2014/11/Islamic-State-Video-Features-Ethnic-Kazakhs/>; and "Kazakhstan Facing Massive Recruitment of Citizens By Terror Organizations," *Tengri News*, 29 June 2015, at <http://en.Tengrinews.Kz/Military/Kazakhstan-Facing-Massive-Recruitment-Of-Citizens-By-Terror-261007/>.



The underlying causes of radical Islamist militancy and terrorism within Kazakhstan can be attributed to domestic policies of the Nazarbayev government and the country's territorial proximity to the ongoing conflict and instability in Afghanistan. Prior to its independence in 1991, the territory of Kazakhstan was part of a constellation of republics aligned with the Soviet Union. After the dissolution of the Soviet Union, Nursultan Nazarbayev became the President of Kazakhstan, and has remained in power ever since. Kazakhstan's political elite (and more specifically, Nazarbayev) have given the international community assurances on developing political measures to steer the country towards democracy, but these have not materialized.²⁰ As of 2015, Nazarbayev has retained his presidency by initiating snap elections to increase advantages over potential challengers.²¹ The Nazarbayev regime has primarily been focused on domestic stability, viewing foreign investment into Kazakhstan's economy as the bedrock for a secure and stable state.²² Nazarbayev's security strategy for his country has rested on a dovetailed approach: repressive domestic policies and multi-vectored foreign policy agreements. On the domestic front, the Kazakhstani government has sought to overhaul the existing security framework by passing programs to fight religious extremism and terrorism for the period of 2013-2017.²³ These policies are aimed at not only religiously-extreme organizations, but are also utilized to suppress the legitimate political opposition. This is not a deviation from past behavior: Nazarbayev utilized state security forces to suppress protesters in Zhanaozen in 2011.²⁴ To further strengthen internal and external stability for Kazakhstan, Nazarbayev has established a multi-vector foreign policy to keep positive political and economic ties with Russia, China, the European Union and the United States. Through regional security organizations (CSTO, SCO, CIS Anti-Terrorism Center), Kazakhstan has the ability to cooperate with both Russia and China for military training, information sharing, and technical assistance; yet it retains its territorial sovereignty and national autonomy. Simultaneously, Kazakhstan has been able to cooperate with both NATO and OSCE, allowing for a balancing of engagements with both Eastern and Western superpowers.²⁵

The government of Kazakhstan openly recognized the presence of a terrorist threat, for the first time, in 2011-2012. The attacks carried out in the cities of Aktubinsk and Atyrau were crucial in this respect. Unlike the other Central Asian republics, Kazakhstan was able to implement decisive socio-economic reforms, as well as policies of ethnic and religious tolerance that limited the potential spreading of radical ideas. Consequently, the presence of domestic terrorist cells within the State was somehow underestimated, and violent episodes were attributed to foreign extremists from neighboring countries using Kazakhstan as transit hub or refuge. The number of Kazakh nationals involved in terrorist attacks in Russia and

²⁰ Nichol, Jim "Kazakhstan: Recent Developments And U.S. Interests," Congressional Research Service, (July 2013), pp. 1-6, at <http://www.Fas.Org:8080/Sgp/Crs/Row/97-1058.pdf>.

²¹ Cornell, Svante E.: "Kazakhstan's Snap Elections," *Diplomatic Courier*, 25 March 2015, at <http://www.Diplomaticcourier.Com/Channels/Ballot-Box/2511-Kazakhstan-S-Snap-Election>

²² Voloshin, George: "Domestic Stability To Remain Kazakhstan's Main Priority In 2013," *Eurasia Daily Monitor*, 16 January 2013, at http://www.jamestown.org/single/?no_cache=1&tx_ttnews%5btt_news%5d=40311#.vzsscwb773m.

²³ Mcdermott, Roger: "Kazakhstan Unveils New Counter-Terrorism And Anti-Extremism Strategy," *Eurasia Daily Monitor*, 8 October 2013, at http://www.jamestown.org/programs/edm/single/?tx_ttnews%5btt_news%5d=41462&chash=939309d2a1269d27fa14119c13651699#.vzxsx6mb773m.

²⁴ Nichol, *op. cit.*, pp. 1-6

²⁵ Mcdermott, *op. cit.*



other Central Asian countries dramatically increased in the 2010s, suggesting both a radicalization of the population and the strong influence of Jihadist organizations.²⁶

The U.S.-Kazakhstan partnership for countering terrorism has been strong since the 1990s, but certainly increased after 9/11. A mutual commitment to combating terrorism was already stated in 2003; and through the years it has encompassed an important five-year military-cooperation agreement, allowing *inter alia* over-flight rights and the use of airbases by US military forces, in order to access Afghanistan.²⁷ In addition, Kazakhstan has served as a corridor to Afghanistan to NATO countries, for the delivery of non-military supplies.²⁸ Increasing U.S. efforts to combat terrorism in Kazakhstan are evident on several levels. At a diplomatic level, bilateral meetings have occurred between senior officials to enhance cooperation in all fields of security. In 2013, the Prosecutor General of Kazakhstan met in Washington, D.C. with heads of governmental agencies, and in particular with the FBI director, to discuss judicial cooperation in combating terrorism.²⁹ More recently, Kazakhstan hosted the Regional Conference on Countering Violent Extremism in Astana, as a continuation of the previous Summit in Washington, D.C.³⁰ At a legal level, an interstate agreement on Mutual Assistance in Criminal Matters is in the process of ratification. Financially, the United States has provided Kazakhstan with several sources of anti-terrorism funding. According to the US Department of State, financial support to Kazakhstan for counter-terrorism has been steady. The last report highlighted that financial assistance added up to \$1,507,000 in 2013. Kazakhstan also benefits from the IMET program, aimed at the education and training of its personnel.³¹

Even so, in February 2015, U.S. Director for National Intelligence James Clapper confirmed the intelligence community's earlier estimate that the Islamic State has "somewhere in the range between 20 and 32,000 fighters".³² It is suspected that many of those fighters have come from outside Iraq and Syria, with a small portion coming from Kazakhstan.³³ In 2014, Kazakhstan authorities claimed that at least 300 Kazakh nationals have migrated to lands controlled by the self-proscribed Islamic State to set up an ethnic Kazakh cell.³⁴ In a video released in November 2014, Kazakh nationals, including young children, are shown in an ISIL training camp wearing camouflaged uniforms and conducting

²⁶ "Fight against Terrorism and Extremism in Kazakhstan," Ministry of Foreign Affairs of Kazakhstan, at <http://www.mfa.kz/index.php/en/foreign-policy/current-issues-of-kazakhstan-s-foreign-policy/counteraction-to-new-challenges/fight-against-terrorism-and-extremism-in-kazakhstan>.

²⁷ Nichol, *op. cit.*, pp. 1-6

²⁸ Cohen and Roach, "Central Asian Terrorism: An Emerging Threat To U.S. Security," Heritage Foundation, at <http://www.Heritage.Org/Research/Reports/2011/06/Central-Asian-Terrorism-An-Emerging-Threat-To-U.S.-Security>.

²⁹ "Prosecutor General Holds Meeting With The Us Ambassador," *KazInform*, at <http://www.Inform.Kz/Eng/Article/2777760>.

³⁰ "Astana Hosted Central And South Asia Regional Conference on Countering Violent Extremism," *KazInform*, at <http://www.Inform.Kz/Eng/Article/2791831>.

³¹ Mariya Y. Omelicheva (2011): *Counterterrorism Policies in Central Asia*, Abingdon, Routledge.

³² Blanchard, Christopher M., Humud, Carla E., Katzman, Kenneth and Weed, Matthew C.: "The 'Islamic State' Crisis And U.S. Policy," Congressional Research Service, (June 2015), p. 1, at <https://Fas.Org/Sgp/Crs/Mideast/R43612.pdf>.

³³ Michel, *op. cit.*, and "Kazakhstan Facing Massive Recruitment of Citizens by Terror Organizations" *Tengri News*, 29 June 2015, at <http://en.Tengrinews.Kz/Military/Kazakhstan-Facing-Massive-Recruitment-Of-Citizens-By-Terror-261007/>.

³⁴ Michel, *op. cit.*



weapons training.³⁵ In January of 2015, another video was released featuring a Kazakh child soldier (identified from previous videos of Kazakhstani children in ISIL training camps) executing two Russian-speaking men accused of working for the Russian Federal Security Service.³⁶ These videos are indications that Kazakhstani nationals have been immigrating to the conflicts in Iraq and Syria, fighting alongside elements of ISIL, gaining experience and training, and will become a threat to the country in the near future if they survive the conflicts and migrate back to Kazakhstan.

4. Nuclear Energy and Security

In the quarter century since the Cold War's end brought dissolution to the Soviet Union and ushered in a new era in nuclear history, few nations have been as pivotal to the global non-proliferation regime that emerged as Kazakhstan. Non-proliferation, since independence, has come to represent the organizing principle of the country's cooperative foreign policy—one that seeks independence through simultaneous engagement with external powers like Russia, the United States, China, and the European Union. Astana's efforts at the non-proliferation of weapons of mass destruction (WMD) is an underpinning factor that ties these goals together. At a time of rising great powers and tensions between nuclear states (particularly the United States, Russia, and China), Kazakhstan's presence as an honest third party is invaluable.

Upon gaining independence in December 1991, the new government in Astana suddenly and unexpectedly found itself in possession of the fourth-largest nuclear arsenal in the world, with an eye-popping 1,410 warheads and more than 1,000 intercontinental ballistic missiles (ICBMs) at its command.³⁷ By 1995, every single one of these weapons would be gone, repatriated to the new Russian Federation. Notably, Kazakhstan did so before its massive oil reserves were found, meaning that it was a terribly poor country when the decision was made. By 2000, Kazakhstan had shuttered operations at the Semipalatinsk nuclear weapons testing site in partnership with the American-led Co-operative Threat Reduction (CTR) initiative, a post-Cold War program designed to assist former Soviet Bloc states with the dismantlement of their nuclear infrastructure. Through the CTR, Kazakhstan was furnished with \$100 million that enhanced the control and accounting of fissile materials; provided emergency response equipment; assisted with SS-18 elimination; funded Project Sapphire, the program that transferred 600 Kgs of highly enriched uranium (HEU) to the United States; and supported the conversion of WMD infrastructure to civilian production.³⁸ In partnership with the CTR program, Kazakhstan dismantled all ICBM silos and associated structures by September 1999. Gidromash, a Soviet-era producer of submarine-launched missiles, was converted to a civilian commercial entity under CTR's Industrial Partnerships Program. While Astana maintains small stocks of short-range ballistic missiles acquired in its Soviet days, and possesses substantial dual-use technology through its active space program, it has not sought an active ballistic missile program since independence.³⁹

³⁵ Boyle, Darren and Wyke, Tom: "Isis Release Shocking New Video of Child Soldiers from Kazakhstan Being Trained With Ak47s," *Daily Mail*, 22 November, 2014, at <http://www.dailymail.co.uk/news/article-2845531/isis-release-shocking-new-video-child-soldiers-kazakhstan-trained-ak47s.html>

³⁶ Zavadski, Katie: "Newest Isis Video Stars A Child Executioner," *New York Magazine*, 13 January 2015, at <http://nymag.com/daily/intelligencer/2015/01/latest-isis-video-shows-kazakh-child-executioner.html>.

³⁷ Adnan, Syed and Bukhari, Athar: "Cooperative Threat Reduction: Case Study of Kazakhstan – Analysis" *Eurasia Review*, 13 June 2011, at <http://www.Eurasiareview.Com/13062011-Cooperative-Threat-Reduction-Case-Study-Of-Kazakhstan-Analysis/>.

³⁸ "CTR Assistance – What It Does: Kazakhstan," U.S. Department of Defense, 15 June 1998, at <http://www.dod.mil/pubs/Ctr/Kazakhstan.html>.

³⁹ "Kazakhstan Overview," The Nuclear Threat Initiative, June 2014, at <http://www.nti.org/learn/countries/kazakhstan/>.



Just as critically, Kazakhstan has institutionally positioned itself as the ideal non-proliferation partner for larger powers. It is a member of virtually every relevant non-proliferation treaty, and has demonstrated consistent efforts at recommitting and rededicating itself to the international non-proliferation regime through initiatives like the Central Asian Nuclear Weapons Free Zone (CANWFZ) of 2006, joining the Nuclear Suppliers Group (NSG) and affirming the country's Additional Protocol to its nuclear safeguards agreement with the International Atomic Energy Agency (IAEA). Astana also agreed to help store Iranian nuclear fuel during the contentious talks between Tehran and the international community to limit Iran's nuclear program. U.S. lawmakers have praised Kazakh non-proliferation efforts, and used that praise to urge ratification of the long-pursued Comprehensive Test Ban Treaty. Sen. Ed Markey (D-Mass) did this on September 13, 2016 with Rep. Bill Foster (D-Ill.), a former nuclear physicist. Kairat Umarov, Kazakhstan's ambassador to the U.S., has also called for CTBT ratification. Today, Kazakhstan and the US are poised to complete the Nuclear Security Training Center to bolster material protection, control, and accounting of nuclear materials, and to counter nuclear and radioactive trafficking.

In many ways, Kazakhstan is a natural fit as an international non-proliferation leader and partner. Its long-time leader, President Nursultan Nazarbayev, talks often and enthusiastically about his country's non-proliferation record—and while this is surely important, the reasons go deeper. Kazakhstan's Semipalatinsk region was the test site for 456 Soviet-era nuclear detonations: 116 took place in open air, which produced a terrible legacy.⁴⁰ Semipalatinsk was established in 1947 by Lavrentiy Beria, Josef Stalin's long-serving secret police chief, and was falsely billed as uninhabited within the vast Central Asian steppes. The first Soviet atomic bomb was tested here, the RDS-1 or "Joe-1" (after Stalin), on August 29, 1949, without evacuations in nearby population centers. The Joe-4, the first Soviet thermonuclear explosion, occurred on August 12, 1953. In total, 456 tests were conducted (340 underground and 116 atmospheric). Drinking water from the Chagan River, the nearest contaminated river to the site, has almost one hundred times more tritium than the recommended limit⁴¹. Simply put, there are few countries that have so directly suffered the lasting pain inflicted by nuclear weapons as Kazakhstan has.

Additionally, Kazakhstan is home to almost 40 percent of world uranium production, according to the Wall Street Journal⁴², and as such, sees uranium mining and processing as key parts of its economic development strategy. At times, this can result in reverberations in the international uranium market felt around the world. In January 2017, Kazakhstan's state-run nuclear fuel company, NAC Kazatomprom, announced that planned production of uranium will be slashed by as much as 10 percent (equivalent to five million pounds, or three percent of total global output), causing prices to jump to \$24 a pound, up from \$18 a pound in December, after global stockpiles swelled to over a billion pounds following the 2011 Fukushima nuclear meltdown in Japan. Weak market dynamics were cited by company officials—which were also behind the decision of Canadian producer Cameco Corp to curtail

⁴⁰ Burton, Douglas: "Nonproliferation: Key To Kazakhstan's Economic Miracle," *The Washington Diplomat*, 7 November 2016, at

https://www.Washdiplomat.Com/Poucharticle/Cms/Index.Php?Option=Com_Content&View=Article&Id=488.

⁴¹ Miklos, Vincze: "The Tragic Story Of The Semipalatinsk Nuclear Test Site," *Gizmodo*, 5 March 2013, at <https://Io9.Gizmodo.Com/5988266/The-Tragic-Story-Of-The-Semipalatinsk-Nuclear-Test-Site>.

⁴² Hoyle, Rhiannon: "Uranium Price Jumps As Top Supplier Pulls Back," *The Wall Street Journal*, 11 January 2017, at <http://www.wsj.Com/Articles/Uranium-Price-Jumps-As-Top-Supplier-Pulls-Back-1484128198?Cb=Logged0.5717679292429239>.



production in April 2016⁴³ —but the episode illustrates the heavy role Astana plays in uranium extraction, and by extension, in global nuclear policy.

At the 2016 Nuclear Security Summit in D.C. —where the leaders of more than 12 countries, including the U.S. and U.K., heralded Kazakhstan’s non-proliferation record and contributions to international peace —President Nazarbayev touted his country’s status as a world non-proliferation leader because of its relinquishment of nuclear weapons from the former Soviet Union, and its post-Cold War role as a processed uranium supplier for other states, a role that alleviates the need for more countries to build their own processing infrastructure.⁴⁴

This role (as well as nuclear non-proliferation and practiced independence as the twin hallmarks of Kazakh foreign policy) paved the way for the long-anticipated IAEA Low Enriched Uranium (LEU) Nuclear Fuel Bank, first announced more than a decade ago and scheduled to open in October. The initiative —which will act as a physical reserve of LEU and provide an alternative source of nuclear power to nations for civilian use, in the process offsetting the need for states to build new enrichment and reprocessing infrastructure —is seen as a jewel of non-proliferation. Kazakhstan, which is incidentally the world’s biggest producer of uranium, will host the bank at its Ulba Metallurgical Plant site in Oskemen, but the facility will be owned and operated by the IAEA (Kazakh authorities will be responsible for emergency preparedness and safety). Notably (and in the only way such an institution could work in the spirit of non-proliferation as a credible assurance-of-supply through which it was designed), supplier state consent will not be required for nation-states to access the bank.

At its heart, according to the IAEA itself, the idea underpinning the bank is to create an assurance of supply for last resort LEU that member states can utilize in case national supplies are unavailable, due to exceptional circumstances, and commercial market options for replenishment are off the table⁴⁵. In order to purchase nuclear fuel from the bank, states must use the obtained LEU fuel for fabrication at the specific power plants experiencing disruption, and agree not to transfer, enrich it further, or export it. Additionally, the material may not be used for nuclear weapons research, development, or production of any kind, and is restricted from being used for any kind of military purpose at all. According to the Arms Control Association’s Tariq Rauf, this represents measures “...more stringent and comprehensive than any national export controls and the guidelines of the Nuclear Suppliers Group.”⁴⁶

Kazakhstan’s role in this respect came up throughout the shaky and always contentious P5+1 negotiations between Iran and the world’s powers over restricting Tehran’s nuclear program. Since independence, Astana has been adamant that states have the right to develop their own civilian nuclear energy programs for peaceful purposes, which Iran has always maintained as the objectives of its nuclear activities (Washington, along with the vast

⁴³ *Ibid.*

⁴⁴ Pillalamarri, Akhilesh: “Does Kazakhstan Get Nuclear Nonproliferation?,” *The Diplomat*, 2 April 2016, at <http://thediplomat.com/2016/04/does-kazakhstan-get-nuclear-nonproliferation/>

⁴⁵ “IAEA Low Enriched Uranium Bank,” International Atomic Energy Agency (IAEA), at <https://www.iaea.org/topics/iaea-low-enriched-uranium-bank>

⁴⁶ Rauf, Tariq: “From ‘Atoms For Peace’ To An IAEA Nuclear Fuel Bank,” *Arms Control Today*, October 2015, at https://www.Armscontrol.Org/Act/2015_10/Features/From-Atoms-For-Peace-To-An-Iaea-Nuclear-Fuel-Bank/; and Rauf, Tariq and Vovchok, Zoryana: “Fuel For Thought,” *IAEA*, March 2008, at <https://www.iaea.org/sites/default/files/49204845963.pdf>.



majority of the rest of the world, strongly disputes this claim). As such Kazakhstan was floated as a potential source of third-party nuclear fuel for Iran, and the IAEA bank's attractiveness grew even more.

Despite the world's uranium-enrichment capacity currently outpacing demand⁴⁷, the IAEA is projecting nuclear power generation to expand in the near future, due in part to a number of reactors under construction in China, and the number of countries that employ nuclear power to increase from the 30 who presently utilize it.⁴⁸ Because the commercial processing of uranium is only conducted in the United States, Russia, China, and France (as well as through a multinational consortium known as Urenco, composed of Germany, the U.K., and the Netherlands in several assorted locations), maintaining an assurance-of-supply has emerged as a higher priority for many of these states.

Reaching an agreement took time, with particular delays arising as the IAEA and Astana took over three years to come to terms on a suitable hosting arrangement. The bank's framework contains 19 articles that guide its operation and the terms under which nations may access its reserves, such as the need for a comprehensive safeguards agreement with the IAEA. Reflecting the international flavor of its ownership body, the Kazakh nuclear fuel bank is to be funded by a variety of voluntary donations and kept separate from regular IAEA budgeting. In keeping with the LEU bank's multilateral design and intentions: according to the IAEA's official news release service, the nuclear organization has lined up \$150 million in contributions from state parties, enough to keep the bank in operation for at least a decade⁴⁹. The European Union (EU) has agreed to contribute €25 million, with another €5 million coming annually for security; Kuwait will donate \$10 million, with Norway kicking up another \$5 million. The NTI and the United States are the largest dollar contributors, at \$50 million and \$49 million apiece, respectively. Kazakhstan will chip in \$400,000 USD, plus additional contributions.⁵⁰ The LEU bank is intended to be a resource of last resort for interested parties, to be utilized in the event of major supply disruption or significant non-access to the commercial market, in order to assure both reliability and predictability; as such it is not expected to interfere with existing, state-to-state transactions for nuclear fuel and energy products⁵¹. The facility will have a maximum reserve capacity of 90 metric tons of LEU, a total the IAEA says is sufficient to provide power to a major city for up to three years.⁵²

The IAEA fuel bank is perhaps the most notable example of Kazakhstan's ongoing efforts at reducing the spread of nuclear materials and weapons precursors, but it is far from the only one. The country proudly touts the cooperation exhibited between the Kazakhstan Customs Control Committee (KCCC) and America's DOE/NNSA Second Line of Defense Program to equip national points of entry (ports, border crossings, airports) with enhanced radiation detection equipment; it is currently in the final stages of converting its last nuclear reactors from highly enriched uranium to LEU-based facilities, and has partnered with Washington to dispose of more than three metric tons of HEU, or enough to produce 775 nuclear weapons. The country also works closely with the United States to implement and

⁴⁷ Rauf, *op. cit.*

⁴⁸ Rauf and Vovchok, *op. cit.*

⁴⁹ Nitzsche, Alexander: "IAEA Moves Ahead On Establishing Low Enriched Uranium Bank In Kazakhstan", 11 June 2015, IAEA, at <https://www.iaea.org/newscenter/news/iaea-moves-ahead-establishing-low-enriched-uranium-bank-kazakhstan>.

⁵⁰ *Ibid.*

⁵¹ Our Work, "The IAEA LEU Bank," 10 March 2016, IAEA, at <https://www.iaea.org/ourwork/leubank>

⁵² Nitzsche, *op. cit.*



maintain rapid response emergency management procedures in the event of a nuclear crisis.⁵³ Kazakhstan was also recognized at the 2016 NSS for strengthening nuclear and other radioactive material security, minimizing nuclear and other radioactive materials, contributing to the countering of nuclear smuggling, supporting and collaborating with multilateral institutions, and partnering with external stakeholders.

Furthermore, Kazakhstan has offered itself as an honest broker for disputes over non-proliferation between the international community and rogue states like North Korea. A non-permanent member of the U.N. Security Council in 2017, Kazakhstan joined Japan in jointly pushing for additional sanctions in response to Pyongyang's destabilizing nuclear and ballistic missile tests that occurred throughout 2016, and has offered in the past to act as a mediating body between North Korea and the rest of the world in any denuclearization talks that might arise between them.⁵⁴ Here we see once more the dovetailing of Kazakhstan's practiced independence with the wider non-proliferation aims of the international community as an effective foreign policy model.

There are some notable caveats that must be mentioned when evaluating Kazakhstan's honest broker role. The country is a founding member of the Russian-led Collective Security Treaty Organization (CSTO) and the Eurasian Economic Union (EEU), and cooperates closely with Moscow on air and missile defense. Kazakhstan does maintain the Baikonur Cosmodrome, built during Soviet times, which Russia still uses for all of its launches to the International Space Station (ISS). Kazakhstan also leases a portion of the same site to Moscow for ballistic missile testing, along with the Sary-Shagan anti-ballistic missile testing ground for continued testing.⁵⁵

The extent and complexion of Kazakhstan's partnership with the West, moreover, is likely to remain relatively limited to narrowly-focused matters like non-proliferation, where clearly defined, albeit limited, avenues for cooperation are apparent, without much scope beyond that. For all of Kazakhstan's very notable and commendable achievements in the non-proliferation realm, its governmental system and dismal human rights record put serious breaks on the extent its relationship with the United States and other Western powers can go. The relationship, while warm in specific areas, is resolutely transactional in nature, and should not be seen in lights beyond that.

Kazakhstan has contributed to the non-proliferation of chemical and biological weapons as well —although its role is not as natural or prolific. Kazakhstan joined the Chemical Weapons Convention in 2000, and inherited one Soviet chemical weapons production plant in the city of Pavlodar, which never actually produced any chemical warfare agents after Moscow became engaged in CWC talks; in 2005, the plant filed for bankruptcy, and was sold to Bazalt-PV in 2007⁵⁶. In 2015, Kazakhstan, in conjunction with the Pentagon's Defense Threat Reduction Agency, opened the Central Reference Laboratory in Almaty, at a cost of \$102 million. It acts as a Central Asian hub for fighting dangerous pathogens

⁵³ "Factsheet: U.S. – Kazakhstan Cooperative Activities in Nuclear Security," *The Japan Times*, 25 March 2014, at http://www.japantimes.co.jp/news/2016/11/09/national/politics-diplomacy/japan-kazakhstan-push-fresh-sanctions-north-korea/#.wiqff1fsp_q.

⁵⁴ "Japan, Kazakhstan To Push For North Korea Sanctions, Closer Economic Ties," *The Japan Times*, 9 November 2016, at http://www.japantimes.co.jp/news/2016/11/09/national/politics-diplomacy/japan-kazakhstan-push-fresh-sanctions-north-korea/#.wiqff1fsp_q

⁵⁵ "Kazakhstan Overview," *op cit*.

⁵⁶ *Ibid*.



throughout the region⁵⁷; the lab is run by the Kazakh Scientific Center of Quarantine and Zoonotic Diseases.

Of course, it must be highlighted that Kazakhstan's leading contributions to the global non-proliferation regime have led to wonderful diplomatic and economic benefits for Astana as well. The early decision to divest its nuclear infrastructure instantly improved relations with America and the West, which in turn poured financial support and investment into Kazakhstan, particularly into its fledgling oil sector. William H. Courtney, an adjunct fellow with the RAND Corporation, stated in an interview with *The Washington Diplomat* that "...wide support in Kazakhstan for the non-proliferation stance reinforces investor perceptions that the country is stable and pragmatic...this has helped it attract substantial investment, including the \$37 billion Chevron Tengiz oil field development, the first huge foreign investment project anywhere in the former Soviet Union"⁵⁸. In 2010, Kazakhstan became the first former Soviet republic as well as the first predominantly Muslim country to chair the OSCE; and it is the only Central Asian state to have chaired the Organization of Islamic Cooperation, in 2011-2012. In January 2016, Astana was named a non-permanent member of the UN Security Council.

Therefore, for Kazakhstan, its commitment to non-proliferation is a way to reinforce regional stability, while simultaneously increasing its international stature and influence. Astana has an important role to play in assisting with the containment and constraint of dangerous nuclear activities in places like Iran and North Korea —often as a trustworthy third party to those with so little trust between each other. The country has shown the international community that the safe and secure use of nuclear energy is possible without the development of an offensive weapons program, thereby helping advance global security.

⁵⁷ Pasternack, Alex: "Why The U.S. Is Building A High-Tech Bubonic Plague Lab In Kazakhstan," *Vice News*, at <http://Motherboard.Vice.Com/Blog/Why-The-Us-Is-Building-A-High-Tech-Plague-Lab-In-Kazakhstan>.

⁵⁸ Burton, *op. cit.*



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