Araştırma Makalesi / Research Article

A Comparative Analysis of the Energy Policies of China and Russia in Kazakhstan*

Sharifa Giritlioglu**

Abstract

The objective of this study is to analyze the energy policies of China and Russia in Kazakhstan. Firstly, the historical context of energy cooperation between Kazakhstan, China, and Russia will be examined. Secondly, the distinctive approaches taken by each country will be evaluated. Finally, the impact of these two regional powers on Kazakhstan's energy policy will be assessed. Kazakhstan holds a prominent position in the global energy sector owing to its considerable reserves of oil and natural gas. China and Russia acknowledge Kazakhstan's crucial role as an energy source and invest significantly in its energy industry. Though both countries use Kazakhstan's energy resources, they have distinct approaches. China adopts a proactive and assertive stance towards Kazakhstan, entering into advantageous agreements and investing in infrastructure initiatives. On the contrary, Russia maintains a passive stance by concentrating on preserving its current energy infrastructure and strengthening its hold over Kazakhstan's energy reserves. To summarize, the energy strategies pursued by China and Russia in Kazakhstan carry substantial ramifications for the creation and transaction of energy resources within the region.

Keywords

Kazakhstan, China, Russia, energy policy, oil, natural gas, pipelines.

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* Date of Arrival: 30 November 2023 – Date of Acceptance: 7 June 2024
You can refer to this article as follows:
Giritlioglu, Sharifa. "A Comparative Analysis of the Energy Policies of China and Russia in Kazakhstan." *bilig*, no. 112, 2025, pp. 33-61, https://doi.org/10.12995/bilig.7772.

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Çin ve Rusya'nın Kazakistan'daki Enerji Politikalarının Karşılaştırmalı Analizi*

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Öz

Bu araştırmanın amacı Çin ve Rusya'nın Kazakistan'daki enerji politikalarını analiz etmektir. Öncelikle Kazakistan ile Çin ve Rusya arasındaki enerji iş birliğinin tarihsel bağlamı incelenecektir. İkinci olarak her ülkenin benimsediği farklı yaklaşımlar değerlendirilecektir. Son olarak bu iki bölgesel gücün Kazakistan'ın enerji politikasına etkileri ele alınacaktır. Kazakistan, önemli petrol ve doğalgaz rezervleri nedeniyle dünya enerji sektöründe öne çıkan devletlerden biridir. Çin ve Rusya, Kazakistan'ı hayati bir enerji kaynağı olarak kabul etmektedir ve bu nedenle ülkenin enerji endüstrisine önemli yatırımlar yapmaktadır. Ancak, Kazakistan'ın enerji kaynaklarını ortak kullanmalarına rağmen, Çin ile Rusya'nın bu konuda yaklaşımları farklılık göstermektedir. Çin, avantajlı anlaşmalar ve altyapı projelerine yatırım yaparak Kazakistan'a karşı proaktif ve iddialı bir duruş sergilemektedir. Öte yandan Rusya, mevcut enerji altyapısını korumaya ve Kazakistan'ın enerji kaynakları üzerindeki kontrolünü sağlamlaştırmaya odaklanarak daha pasif bir yaklaşımı tercih etmektedir. Sonuç olarak, Çin ve Rusya'nın Kazakistan'da izlediği enerji politikalarının bölgenin enerji kaynaklarının üretimi ve ticareti üzerinde kayda değer etkileri bulunmaktadır.

Anahtar kelimeler

Kazakistan, Çin, Rusya, enerji politikası, petrol, doğal gaz, boru hatları.

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* Geliş Tarihi: 30 Kasım 2023 – Kabul Tarihi: 7 Haziran 2024
Bu makaleyi şu şekilde kaynak gösterebilirsiniz:
Giritlioglu, Sharifa. "A Comparative Analysis of the Energy Policies of China and Russia in Kazakhstan." *bilig*, no. 112, 2025, ss. 33-61, https://doi.org/10.12995/bilig.7772.

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Introduction

The issue of energy is one of the most prevalent challenges worldwide. Over time, the increasing demand for energy has compelled developing nations to adopt innovative strategies and approaches to develop new sources of energy, making use of their natural resources. The Republic of Kazakhstan is an important strategic country for both the People's Republic of China (PRC) and Russia in terms of ensuring energy security. While it is considered as an important source of energy for China, which demands increasing amounts of energy for its rapidly developing economy, for Russia, which has been under sanctions by Western countries in recent years, Kazakhstan has become of great importance in terms of energy transfer.

Considering the current conjuncture, the impact of China and Russia on international relations has garnered significant attention from researchers, not only exploring broader global issues but also reassessing specific aspects of their foreign policy in regions like Central Asia, Africa, and the Middle East, including areas such as energy policy, economy, soft power, and more. A comprehensive evaluation of the foreign policy objectives of both countries reveals nuanced directions.

This research aims to provide a comprehensive analysis of the energy policies of China and Russia towards Kazakhstan, utilizing sources in Russian, Chinese, and English languages. A considerable body of research in Russian examines Russia's energy policies towards Central Asia and Kazakhstan. Scholars such as S. M. Makarova, A. Malashenko, A. V. Beloglazov, E. Alifirova have provided insights into Moscow's approach to the region. Additionally, works by A. Suraganov, S. S. Zhiltsov, and I. B. Mamedov delve into the intricacies of energy relations between Russia and Kazakhstan. Various perspectives on Moscow and Beijing's approaches to Kazakhstan's energy policy have been investigated by K. Syroezhkin, A. Petersen, A. Dankov, and S. T. Ikramov further enriching the discourse on energy cooperation in the region.

Chinese scholarship offers valuable perspectives on economic cooperation and energy policies between China and Central Asian countries, with a particular focus on Kazakhstan. Scholars like Wang Haiyan, Shan et al.,

Qin, and Qiu et al. contribute to the understanding of China's energy strategies in the region.

Studies published in English provide a broader perspective on energy cooperation involving Russia, China, and Kazakhstan. Researchers such as C. B. Alvarez, R. M. Cutler, Z. Saurbek, G. A. Movkebaeva, Janet Xuanli Liao, V. Schulhof, Yabo Zhao et al., and N. Nogayev offer valuable insights into the dynamics of energy relations in the region. Moreover, English literature addresses the competitive dynamics of the "triangle" involving China, Russia, and the USA. Works by S. Blank, L. Dittmer, G. Mitchell, and K. Muqtedar shed light on the geopolitical dimensions of energy cooperation and competition in Central Asia.

While there is a substantial amount of scientific work in Russian, Chinese, and English, most are fragmentary, and there has been no special study on Sino-Russian-Kazakhstan energy relations after 2021. Thus, this study aims to comprehensively analyze the issue, considering multiple perspectives to promote understanding and collaboration.

This paper presents a comparative analysis of China and Russia's energy policies in Kazakhstan. It also examines the evolving international context in the region, which is being shaped by the energy policies of these two influential countries. The complex context not only justifies but also encourages Kazakhstan to develop external partnerships. Kazakhstan is focused on developing partnerships and expanding its economy through energy trade, with China and Russia being the main purchasers. The energy policies of these countries have a significant impact on regional stability in Kazakhstan and Central Asia.

This study aims to evaluate Kazakhstan's energy potential and achieve several key objectives. First, it will assess the energy potential of Kazakhstan. Additionally, it will evaluate the significance of Kazakhstan for both China and Russia by examining their energy policy priorities in the country. The study will also compare their energy policies and identify current and potential areas of competition within the energy sector. Furthermore, the research seeks to identify the preconditions that could lead to geopolitical changes in the region because of a result of China's growing strength and Russia's diminishing influence.

The main argument of this paper asserts that the security of energy supplies for China and Russia within Kazakhstan plays a crucial role in shaping both regional stability and global dynamics. As the influence of these two major powers expands into Central Asia, this study argues that conducting a comparative analysis of their energy strategies in Kazakhstan provides a unique perspective for comprehending the evolving geopolitical landscape. This involves assessing Kazakhstan's importance to both China and Russia, closely examining their energy policy priorities and delineating areas of collaboration and competition. By doing so, the paper unveils the intricate network of strategic interests that forms the foundation of their engagements. Additionally, the research delves into the conditions that might precipitate potential geopolitical shifts in the region, influenced by the growing strength of China and the altering influence of Russia. Through a thorough examination of Kazakhstan's energy potential and a comparative scrutiny of the energy policies of China and Russia, this study aims to offer valuable insights into the intricate interplay of energy, geopolitics, and international relations in Central Asia.

The research is organized into four main phases. Initially, the study examines the present state of Kazakhstan's energy sector. The second stage provides a comprehensive analysis of China's energy policies in Kazakhstan, while the third stage delves into Russia's energy policies in the same context. In these stages, the strengths and weaknesses of China and Russia are identified and compared. Ultimately, the study concludes with a comprehensive assessment of both countries' energy policies in Kazakhstan.

Initially, the study focused on analyzing the energy potential of Kazakhstan, as well as the current state of its respective energy sector. This was achieved through a review of official statistical data and relevant literature. Subsequently, a comprehensive review and critical analysis of China and Russia's current national energy policies was carried out, with reference to official government documents and programs. A comparison was made between China's and Russia's energy policies based on the outcomes of the first three stages of analysis.

The Energy Potential of Kazakhstan

The Republic of Kazakhstan, with its geostrategic significance marked by geographical, economic, and military attributes, holds a key position that allows it to influence Central Asian processes, especially in regional security. As a substantial state sharing borders with China and Russia, Kazakhstan plays a pivotal role in ensuring security and fostering economic advancement in the adjacent regions of China and Russia. The dynamics of interstate cooperation among the PRC, Russia, and Kazakhstan offer valuable insights for the examination of international relations and foreign policy.

Transitioning to the subsequent section, we will delve into the examination of Kazakhstan's energy potential, shedding light on the rich resources and reserves that position the country as a crucial player in the global energy landscape. This comprehensive overview will provide essential insights into the factors influencing continued foreign investment and the role of Kazakhstan in shaping the trajectory of the energy sector. As an active participant in the international community, Kazakhstan's contributions to the global energy balance and security underscore its role as a responsible state cognizant of its geopolitical significance in ensuring international stability and security.

Presently, Kazakhstan, a leading energy producer in Central Asia, depends on the primary hydrocarbon resources of the area, specifically oil and natural gas. Thanks to its modest population and minimal energy consumption, Kazakhstan primarily exports hydrocarbons, making it a net exporter in Central Asia (Movkebaeva 82). Most of Kazakhstan's exported hydrocarbons travel through Russian territory or pipelines (Saurbek 79). Kazakhstan's interest in China's construction of additional pipelines and gas pipelines to East Asia, from the perspective of diversification, offers an additional economic and political incentive.

As of now, over 200 oil fields have been discovered on the land of Kazakhstan. Around 62% of Kazakhstan's land is estimated to hold oil and gas reserves. The western region of Kazakhstan holds a considerable portion of these deposits, situated in the provinces of Atyrau, Mangistau, West Kazakhstan, Aktobe, and Kyzylorda. The largest oil fields in terms of recoverable reserves are Kashagan (1-2 billion tons), Tengiz (0.75-1.125 billion tons),

Karachaganak (1.35 trillion m^3 of gas and 1.2 billion tons of oil), Uzen (1.1 billion tons), Kalamkas (67.6 million tons), and Zhetybay (68 million tons) (Ministry of Energy of the Republic of Kazakhstan).

Kazakhstan ranks 12th globally in terms of proven oil reserves, with a total of 3.9 billion tons. Natural gas reserves amount to 2.7 trillion m^3, ranking 14th in the world (EY 2). Kazakhstan's proven oil and condensate reserves are currently at a level that would account for over 45 years of production (Ishekenova). Oil production amounted to 85.9 million tons in 2021, with domestic consumption accounting for 23% of the total. Gas production was 54.2 billion m^3, with 61% consumed domestically. Over the past 30 years, Kazakhstan has increased oil production by 3.5 times, and in terms of production for 2021 it ranks 13th in the world (2% of global production) (Suraganov 3).

In 2020, Kazakhstan produced approximately 2 million barrels per day of oil and gas condensate, a historic high. However, its refining capacity remained largely underdeveloped during the 1990s and 2000s despite having the largest oil production in the region. During this period, the country had to import almost 30% of its oil products from neighboring countries. In 2009, the Kazakh authorities initiated a program to modernize the refining industry, acknowledging the country's economic vulnerability resulting from its reliance on external petroleum product supplies (Kross et al. 13). In 2018, the modernization of refineries in Atyrau, Pavlodar, and Shymkent enabled Kazakhstan to produce enough petroleum products to meet domestic demand. As a result, the country now has the largest refining capacity in Central Asia and is a net exporter of products to Europe and Central Asia. Thanks to the refinery modernization programs in the country, local consumers now have a stable and reliable domestic supply of petroleum products (Nogayev).

The stable growth of hydrocarbon production in Kazakhstan enabled the country to become one of the top 10 oil exporting countries. Oil and gas production in Kazakhstan is expected to significantly increase in the short term due to favorable conditions and increased demand in the energy markets. In 2024 oil production is expected to be around 100 million tons (Ministry of Energy of the Republic of Kazakhstan).

The biggest oil development and production projects in Kazakhstan are Tengizchevroil LLP, North Caspian Operating Company B.V., and Karachaganak Petroleum Operating B.V. The oil and gas production structure comprises some of the largest multinational corporations including Chevron (USA), ExxonMobil (USA), CNPC (China), ENI (Italy), Shell (Great Britain), Lukoil (Russia), Total (France) and others. National Campaign KazMunayGaz is the leader in the oil and gas industry in Kazakhstan with full integration at all stages of the value chain (Suraganov 7). Although there is high diversification and the national company has a significant share of participation, the majority of the oil and gas production is controlled by foreign partners. Foreign investors receive approximately 35% of export earnings each year. Additionally, the contracts with foreign companies (Tengizchevroil LLP – 2033 (Tengizchevroil LLP), North Caspian Operating Company B.V. – 2041 (EY 3), Karachaganak Petroleum Operating B.V. – 2038 (Karachaganak Petroleum Operating B.V.) are set to expire on the aforementioned dates.

The Tengiz field has recoverable crude oil reserves estimated at 750 million to 1.1 billion tons (6–9 billion barrels). Since 1993, the Tengizchevroil (TCO) LLP partnership, consisting of Chevron (50%), ExxonMobil (25%), KazMunayGas NC (20%), and Russian Lukoil (5%), has been developing the field (EY 3; Tengizchevroil LLP). The Tengiz field is estimated to contain 3.1 billion metric tons (25 billion barrels) of oil, with an additional 200 million metric tons (1.6 billion barrels) in the Korolev field. The total recoverable crude oil in both fields is estimated to be 1.4 billion metric tons (11.5 billion barrels). The Tengiz reservoir has a large areal extent, measuring 20 kilometers (12 miles) by 21 kilometers (13 miles). In 2008, TCO completed its Sour Gas Injection and Second-Generation Plant (SGI/SGP) expansion project. The average daily production capacity has exceeded 80 thousand metric tons per day (640 thousand barrels) of crude oil and 25 million cubic meters per day of natural gas in recent years. From January to September 2023, crude production reached 21.7 million metric tons (173.1 million barrels). During the first nine months of 2023, TCO sold more than 932,000 metric tons of LPG and over 1.9 million tons of sulfur. Additionally, TCO produced and supplied approximately 6 billion cubic meters of sales gas to Kazakhstan's gas pipeline network, with almost all of it being supplied to the domestic market (Tengizchevroil LLP).

The North Caspian PSA contract area comprises Kashagan, the largest offshore field discovered in 2000, with proven recoverable oil reserves of 761.1 million tons. The owners of Kashagan will also explore other structures in the area, including Kalamkas-Sea, South West Kashagan, Aktoty, and Kairan. The project is currently operated by the North Caspian Operating Company (NCOC), which is jointly owned by foreign investors. Italian ENI (16.81%), US ExxonMobil (16.81%), Netherlands and UK Royal Dutch Shell (16.81%), France Total (16.81%), Chinese CNPC (8.33%), Japanese INPEX (7.56%), and local investor KazMunaGas NC (16.88%). In 2019, the National Centre of Oil and Gas Coordination (NCOC) completed the first turnaround of its onshore and offshore facilities, achieving a production rate of 380,000 barrels per day (EY 5). Since 1993, the NCOC has produced almost 90 million tons of oil and 55 billion cubic meters of gas, according to Kazakh officials. The project has attracted investments worth over $60 billion, invested more than $17 billion in local content development, and employed nearly 10,000 people. During the peak of construction, over 40,000 people were involved in the project. Kazakh Prime Minister A. Smailov stated that the North Caspian Operating Company (NCOC) has important tasks ahead to increase production through full-scale field development. Experts suggest that the production potential of Kashagan could reach 1.6 million barrels of oil per day, equivalent to approximately 75 million tons per year (Smailov).

The Karachaganak field is regarded as a primary resource for increasing production due to its status as one of the world's largest oil and gas fields. Its development is the responsibility of Karachaganak Petroleum Operating B.V. (KPO B.V.), a joint venture between several Western companies led by BG Group and ENI. The field has estimated recoverable reserves of 9 billion barrels (1.2 billion tons) of oil and gas condensate, as well as 1.35 trillion cubic meters of natural gas reserves. In 2012, the Karachaganak Petroleum Operating B.V. consortium produced 10.2 million tons of oil. In the same year, KazMunayGas NC acquired a 10% stake from the current shareholders and joined the project. For a considerable period, Karachaganak was the only significant oil and gas project in Kazakhstan that did not involve the state. The consortium is composed of the British BP Group (29.25%), the Italian ENI (29.25%), the US Chevron (18%), the Russian Lukoil (13.5%), and the local KazMunayGas NC share is 10% (EY 5). In 1997, Venture Partners

teamed up with the former State Oil & Gas Authority to develop the extensive reserves of Karachaganak. They signed a Final Production Sharing Agreement (FPSA) that will enable the partnership to operate Karachaganak until 2038. Since signing this agreement, they have invested over $29.8 billion in the operations and have applied industry-leading hydrocarbon technology to one of the world's most complex reservoirs. In 2022, the production of hydrocarbons in Karachaganak reached 128.5 million barrels of oil equivalent. Approximately 57.3% of the total gas produced, which amounts to 11 billion cubic meters, was re-injected to maintain reservoir pressure (Karachaganak Petroleum Operating B.V.).

Oil is primarily transported through pipelines, which are the most cost-effective and eco-friendly mode of transportation. Over 80% of Kazakhstan's oil production is exported, while the remainder is directed towards domestic processing. The primary operators are (ORK; Suraganov 8); Routes of the Caspian Pipeline Consortium: The Tengiz-Novorossiysk pipeline has a capacity of 67.0 million tons and is 1,510 kilometers long. Only 452 kilometers of this pipeline pass through Kazakhstan. Routes of KazTransOil JSC: These routes include transportation from a Kazakhstan refinery to Uzen-Atyrau-Samara, the Aktau port, transshipment to the Caspian Pipeline Consortium Route, and Atasu-Alashankou. These routes have a capacity of 17.5 million tons (Atyrau-Samara) and 5.2 million tons (Aktau port), respectively. The length of the pipeline is 5,372 kilometers. The routes of the Kazakhstan-China Pipeline LLP are: Atasu-Alashankoou and Kenkiyak-Kumkol. The pipeline has a capacity of 20.0 million tons and a length of 1,759 kilometers. Routes of MunaiGas LLP: The route runs from Kenkiyak to Atyrau, is 449 kilometers long, and has a capacity of 6.0 million tons (Suraganov 8; ORK 8-9).

Since the mid-2000s, Kazakhstan's authorities have focused on producing, processing, and exporting natural gas. Kazakhstan's natural gas reserves are smaller than Russia's and Turkmenistan's reserves in the post-Soviet region. Natural gas production has increased almost six times since Kazakhstan gained independence (Liao 494-95). Kazakhstan has a widespread system of main and distribution gas pipelines. JSC NC "QazaqGaz" is the national operator for gas and gas supply infrastructure in Kazakhstan, responsible for managing the transportation of marketable gas through main gas pipelines.

Kazakhstan's gas transmission system covers a total length of more than 56,000 kilometers of gas distribution network, with over 20,000 kilometers of main gas pipelines and 56 compressor stations. The main operators in Kazakhstan are (ORK 5; Suraganov 9):

- Routes of Intergas Central Asia JSC: The routes cover Kazakhstan, Russia, Uzbekistan, and Turkmenistan, with a capacity of 198 billion m^3 and a length of 15,260 kilometers.
- Routes of Asian Gas Pipeline LLP: The routes run from Kazakhstan to China, with a capacity of 55 billion m^3 and a length of 3,916 kilometers.
- Routes for the Beineu-Shymkent Gas Pipeline LLP: It has a capacity of 15 billion cubic meters and is 1,454 kilometers long.
- The routes of JSC KTG-Aimak are used for the domestic market and cover a distance of 59,182 kilometers (ORK 7-8).

Oil accounts for 51.5% and gas 3.8% of all goods exported from Kazakhstan in 2021. For 2020, the figures were 50.5% and 5.3%, respectively. Over 96% of the oil was exported via pipelines, with more than 70% of the total volume sent to European countries. China has been the main consumer of Kazakh gas in recent years (Suraganov 10). The historical agreements between Russia and Kazakhstan enable the provision of gas supplies to the Orenburg gas processing plant. Additionally, these supplies are exported to Europe via Gazprom channels (Ikramov 75).

Around 60% of Kazakhstan's merchandise exports come from oil and gas condensate. 99% of the National Fund is replenished with proceeds from the oil and gas sector. In the last decade, transfers from the National Fund to the Republican budget have amounted to 30-45%. After considering the export customs duties on crude oil and oil products, 30-50% of the state budget is replenished through the revenue raised by the oil and gas industry. The amount of revenues to the National Fund directly depends on the price of oil (EY 6). Building upon the historical significance of oil and gas as primary contributors to Kazakhstan's foreign direct investment, averaging 46% over the past decade (Suraganov 12), sustaining robust investment becomes imperative for the continued growth of the industry.

Energy Policy of the People's Republic of China in Kazakhstan

Expanding on the evaluation of Kazakhstan's energy potential, the focus transitions to examining the energy policies pursued by the PRC within the context of Kazakhstan. This part of the paper investigates China's strategic engagement with Kazakhstan, delving into policy frameworks, diplomatic strategies, and collaborative initiatives designed to address China's growing energy demands.

The significance of China's energy policy towards Kazakhstan has escalated due to deepening economic ties between the two nations and China's increasing need for energy resources. The PRC has instituted various measures to secure its energy supplies from Kazakhstan, including investments in Kazakhstan's energy sector, the construction of pipelines, and the establishment of energy cooperation agreements. Given Kazakhstan's strategic location, it emerges as a crucial transit country for China, facilitating access to energy resources in Central Asia. China's interest in Kazakhstan is primarily driven by considerations of energy security and logistics. Kazakhstan's abundant reserves of oil, gas, and coal make it an attractive avenue for China to diversify its energy sources and reduce dependence on the Middle East. Furthermore, China's focus on Kazakhstan aligns with three key factors: energy security, logistical advantages, and the strategic imperative to promote Chinese energy companies globally. This global expansion is bolstered by China's "going global" plan (Wang 27), which is part of the broader Belt and Road Program, providing additional infrastructure support for Chinese energy investments in Kazakhstan. This interconnected approach underscores the multifaceted dimensions of China's energy strategy in Kazakhstan and its broader international ambitions (Qin 52).

The swift expansion of the Chinese economy in the early 21st century led to heightened demand for energy resources, widened Beijing's economic prospects, and established conditions for reinforcing political leverage in Central Asia (Dankov). Official records show that the quantity of oil consumption in China was 450 billion tons in 2022. China's energy demands have increased by four times over the past decade, with an estimated consumption of 480 billion cubic meters of natural gas projected for 2030 (Shan et al. 1295; Qiu et al 3; Statista).

In 2003, during the state meeting on economic work, the leadership of China identified "finance" and "oil" as two significant factors for ensuring the country's economic security. By 2022, China's reliance on imported oil has reached 57%, whereby over 58.8% of the imported oil primarily comes from the Middle East. Nonetheless, the situation in the Middle East and North Africa has been complicated by armed conflicts and political destabilization in recent years. According to the Twelfth Five-Year Plan for the Development of the Western Region, energy cooperation with Central Asian countries is a key aspect of China's Western strategy (NDRC 16). China served as a crucial market for the surplus energy exported by nations along the Belt and Road, leading these countries to increasingly rely on China as a destination for their energy exports (Zhao et al. 143). As a result, China must adopt a more proactive policy of openness, enhance the level of openness towards the West, broaden external relations with Western border countries to access foreign resources and diversify the nation's secure energy supply channels.

The geopolitical environment of China drastically transformed when the Central Asian republics gained independence in 1991. Rather than encountering a known but perilous adversary like the USSR, the PRC found itself facing a diverse array of small independent countries along its western borders. During the two decades following the collapse of the Soviet Union, from 1991 to 2003, a period marked by expansion, Beijing allocated limited diplomatic and political resources to support Chinese enterprises in Kazakhstan as part of its broader regional strategy. Initially, energy did not hold the top position in bilateral relations; financial loans to the newly independent country, migration, border security, control of separatists in Xinjiang, and trade were (and continue to be) significant items on the Kazakh-Chinese agenda. The first petroleum agreement was not signed until September 1997, after China National Petroleum Corporation (CNPC) became involved in the country. Even within the largest Chinese multilateral initiative in the region, the Shanghai Cooperation Organization, the security of energy supply was not among the primary elements in the negotiations (Alvarez 60). Nevertheless, during the 2010s, China's activities in Central Asia, particularly in Kazakhstan, have undergone substantial changes.

In a short period, China has emerged as Kazakhstan's leading economic and political ally, assuming the role of the primary investor and creditor. Kazakhstan is a crucial energy partner for China in the region. From 1993, China and Kazakhstan formally initiated cooperation in the energy sector. Initially, China's entry into the region was characterized by a commitment to non-interference in domestic matters and a focus on fostering economic collaboration. This approach, presenting an alternative to other global powers, received positive feedback from local elites. China demonstrated a keen interest in investing in significant infrastructure projects, encompassing oil and gas pipelines, transportation networks, power facilities, bridges, as well as transport and logistics hubs (E 23–24).

For the past 20 years, collaboration between China and Kazakhstan regarding energy has exceptionally intensified. In 2003, China National Petroleum Corporation (CNPC) procured 85.6% of the Aktobe oil field's shares, followed by the acquisition of PetroKazakhstan by CNPC in 2005 (The Central People's Government of the People's Republic of China). The gas pipeline connecting Turkmenistan and China was initially an extension resulting from earlier negotiations between Kazakhstan and China. This extension included the expansion of the Bukhara-Tashkent pipeline through Uzbekistan, passing through Almaty to Alashankou on the border. This border location is where the existing Kazakhstan-China oil pipeline from Atasu also enters China. In the late 2000s, the China National Petroleum Corporation (CNPC) initiated talks with Kazakhstan's national energy trust, KazMunaiGaz, for gas imports from western Kazakhstan (Cutler 680).

One of the biggest energy projects between Kazakhstan and China was the construction of the first Kazakhstan-China transnational oil pipeline. Kazakhstan-China Pipeline LLP (KCP) is a legal entity with foreign participation. Its participants are KazTransOil JSC and the Chinese National Oil and Gas Exploration and Development Corporation (CNODC) in a 50/50 partnership. KCP was created to design, build, and operate the Atasu-Alashankou oil pipeline. KCP was established on June 30, 2004, as a result of the agreement between "KazTransOil" JSC and CNODC, following the "Agreement on Cooperation in the Oil and Gas Field" signed on May 17, 2004, between the Governments of the Republic of Kazakhstan and China (KazTransOil).

To implement the Kazakhstan-China oil pipeline project, oil supplies from West Kazakhstan and Aktobe regions to the Chinese market needed to be secured. To address this, CNPC and KazMunayGaz NC JSC signed an agreement on the main principles of constructing the second stage of the Kazakhstan-China oil pipeline on December 20, 2006. The Atasu-Alashankou pipeline (first stage) and Kenkiyak-Kumkol pipeline (second stage) projects were equally implemented by Chinese and Kazakh parties (KCP).

The construction project of the Atasu-Alashankou crude oil pipeline is noteworthy due to its scale and complexity, as well as the valuable experience gained by the company during its implementation. The pipeline traverses four regions of the Republic of Kazakhstan, namely Ulytau, Karaganda, Zhetysu, and Abai, as well as the territory of the People's Republic of China. In July 2006, the State Commission approved the Atasu-Alashankou pipeline, and in November 2008 PS-9 was launched, achieving its designed capacity of 10 million tons of oil per year. In December 2011, PS-11 was launched, and the Atasu-Alashankou pipeline reached its full capacity of 12 million tons of oil per year. In December 2013, PS-8 and PS-10 were launched, leading to a capacity increase of the Atasu-Alashankou pipeline to 20 million tons of oil per year. On 11 December 2007, the Kenkiyak-Kumkol pipeline project was unveiled at the Kenkiyak initial pump station in Aktobe. Construction was completed in September 2009 (KazTransOil). According to the official 2022 statistics, the capacity of the oil pipeline connecting Kazakhstan to China exceeds 20 million tons. This volume is equivalent to the yearly output of a single significant oil field in China (KCP).

In addition to the oil sector, collaboration between China and Kazakhstan also exists in the natural gas sector. Towards the end of 2012, the Development Bank of China signed papers with the Kazakh side for allocating $1.8 billion toward the establishment of the Beineu-Shymkent gas pipeline in Kazakhstan. The Development Bank of China places significant importance on cooperation with Kazakhstan, and the representative office of the Development Bank in Astana was officially launched in October 2018. To date, the Development Bank has supported 33 projects in Kazakhstan, providing loans totaling $34.262 billion and contracts totaling $29.922

billion. The Development Bank strongly supported the implementation of several significant energy projects. Leveraging the framework of China-Kazakhstan intergovernmental cooperation and extensive medium and long-term financing mechanisms, the State Development Bank spearheaded the establishment of a $12.2 billion consortium loan for the Kazakhstan section of the Central Asian Natural Gas Pipeline and $1.8 billion consortium loan for the second phase of the China-Kazakhstan Natural Gas Pipeline. Additionally, it purchased $300 million in bonds to support the first phase of the China-Kazakhstan crude oil pipeline and provided $240 million in financing for its second phase (Ministry of Commerce of the People's Republic of China).

As China depends on Kazakhstan for energy imports and views its western neighbor as a key link in the Belt and Road initiative, Kazakhstan's economy significantly relies on Chinese investment and trade agreements. The collaboration between Kazakhstan and China has been evolving since late 2014, primarily under the Silk Road Economic Belt (SREB) and Kazakhstan's national program "Nurly Zhol". Notably, Kazakhstan has made more substantial progress in implementing this program compared to other regional states. From March 2015 to September 2018, China entered into approximately 70 agreements with Kazakhstan, totaling over $33 billion. These agreements spanned various sectors, including energy, mining, chemical, mechanical manufacturing, agriculture, and infrastructure (Liao 490). This can be attributed to the similarities between the SREB and "Nurly Zhol" initiatives, particularly in terms of facilitating the transit of goods from China through Kazakhstan and developing the country's transport and logistics infrastructure. Additionally, China's willingness to provide generous loans and finance projects under both programs is noteworthy, particularly without imposing any political preconditions (Syroezhkin 21).

In 2017, the bilateral trade between China and Kazakhstan recorded a turnover of $11.07 billion, placing China as Kazakhstan's second-largest trading partner, following Russia (Dankov). In 2022, the State Revenue Committee of the Ministry of Finance in the Republic of Kazakhstan reported a growth in bilateral trade, with a total volume of $24.1 billion, representing a 34.1% increase. Total exports amounted to $13.1 billion, up 34.7% from the previous year, while imports reached $11 billion, reflecting

a 33.5% increase. Kazakhstan's reliance on China as a major trading partner was apparent, with China contributing 22.8% of the total trade volume in 2022 (Ministry of Foreign Affairs of the Republic of Kazakhstan).

Currently, three sections of the Central Asian natural gas pipeline (lines A, B, and C) are active, transferring a total of 35 billion cubic meters of natural gas per year from Turkmenistan to China. The three existing pipelines traverse the territories of Uzbekistan and Kazakhstan, and these transit countries are required to contribute 20 billion cubic meters of natural gas. Accordingly, the pipeline system exports a total of 55 billion cubic meters of natural gas to China each year. Since the completion of the Trans-Central Asian pipeline, 400 billion cubic meters of natural gas have been transported to China. Also, an agreement was reached to resume the construction of the fourth branch (D line) that passes through Tajikistan and Kyrgyzstan during the visit of Turkmenistan's President, Serdar Berdimuhamedov, to Beijing on 6 January 2023 (Ministry of Foreign Affairs of the People's Republic of China). With the construction of the fourth line, it is anticipated that the amount of gas transported annually from Turkmenistan to China will reach 65 billion cubic meters (Ministry of Foreign Affairs of the People's Republic of China).

China's significant position in Kazakhstan can be attributed to two key factors. Firstly, China is the biggest market for Kazakhstan's main exports, including oil, natural gas, uranium, and non-ferrous metals. Secondly, China has established itself as the largest investor and creditor in Kazakhstan. As of 2019, Central Asian countries collectively owe China in excess of $22 billion, with more than half of the debt owed by Kazakhstan specifically. According to data from the Ministry of Commerce of the People's Republic of China, the outward investment to Kazakhstan amounted to $822.240 million in 2021. This represents a rise from the prior figure of – $115.290 million for 2020 (China Economic Information Center).

China's position in Central Asia is undermined by the lack of efficiency in a considerable portion of Chinese investments and corruption scandals surrounding Chinese projects, hindering relations with China. The LRT construction project in Astana is a prime example of this issue (Yakhyarova). Furthermore, the COVID-19 pandemic has led to a decline in activity within the Belt and Road initiative, resulting in a decrease in the implementation

of multiple infrastructure projects. Some academic studies on the future of the Belt and Road Initiative (BRI) suggest that the COVID-19 pandemic is driving a shift towards slower growth and de-globalization. Historical evidence indicates that economic performance tends to decline after pandemics, and forecasts suggest this trend will persist in the short to medium term. In this context, the BRI may be evolving to prioritize securing national interests in a world marked by increased tensions between the US and China and growing divisions (Barua 25; Schulhof et al. 6).

Moreover, it is noteworthy that China's interests in Kazakhstan are predominantly linked to the factors mentioned earlier. Local concerns have a relatively minor impact on China's interests. China is willing to invest in security systems and counter-terrorism initiatives but shows little interest in generating new employment opportunities. While China is ready to finance the construction of extensive pipelines for exporting oil and natural gas, it is not inclined to invest in the gasification of cities and villages in the region. Beijing is prepared to establish transit corridors for transporting goods to Europe but has no intention of developing local transport infrastructure in the remote areas of Kazakhstan. In summary, China's energy policy towards Kazakhstan plays a pivotal role in its overall energy security strategy and broader international economic policies. The strong economic ties between the two nations position Kazakhstan as a valuable energy partner for China, and the collaborative relationship between them is expected to continue flourishing.

Energy Policy of the Russian Federation in Kazakhstan

Examining Russia's energy policies within the borders of Kazakhstan is a complementary endeavor to the exploration of China's strategies in the preceding section. This dual analysis unveils the intricate dynamics of energy cooperation in the region, enabling a comparative evaluation of China and Russia's approaches. This assessment brings to light areas of both alignment and disparity in their quests for energy security within Kazakhstan.

In the early 1990s, the Central Asian states posed challenges for Russia, but today, the Kremlin seeks to firmly integrate this region into Russia, motivated primarily by political and economic considerations. The Russian Federation places significant economic value on Kazakhstan, particularly regarding transit and the extraction of energy resources. Moscow's primary objective in

the region is to establish a zone specific to its interests, reasserting influence over former Soviet republics and curbing external influences, notably from the United States and China. This strategic shift underscores the evolving dynamics of Russia's engagement with Kazakhstan, encompassing economic interests and geopolitical considerations.

Energy is a fundamental component of Russia's attempts to sustain its dominance in the region. After 1991, the post-Soviet republics in Central Asia started to open their economies to the global market to differing extents. Nevertheless, they inherited a deep integration of their energy sectors with the mining and pipeline infrastructure of Russia as part of the USSR. Initially, energy carriers' transportation from the Caspian Sea was solely done through Russia's territory or the state-controlled Russian pipeline system (Makarova 150). Foreign companies are not permitted to utilize these pipelines for transit by Moscow.

Thus, Russia has gained an effective monopoly in the field of energy transit across the Eurasian region. Given that oil and gas are the primary sources of income for the Caspian Sea producers, Moscow's control over the export of their energy resources has granted it significant political leverage over its southern neighbors and has thus served its strategic interests (Mamedov 163). The matter of oil and particularly gas transit has been closely monitored in Russia in recent years. It should be noted that merely 15% of gas intended for export is transported avoiding Ukrainian territory, and this consideration holds significance in determining the "gas" policy's direction. There is no indication that Gazprom, the gas monopoly of Russia, would permit the development of unfavorable schemes for the supply of Kazakh gas.

In the field of oil trade, the Russian monopoly was swiftly dismantled. Following its independence in 1991, Kazakhstan granted Western oil companies access to its hydrocarbon resources. Chevron and ExxonMobil have become partners in the management of the enormous Tengiz and Korolevskoye oil fields located in Kazakhstan (Beloglazov 222-23). To transport this oil to the global market, Western firms initially attempted to access the pipeline system that has been in place since Soviet times, which is overseen by the Russian company Transneft. However, the negotiations have reached an impasse, primarily due to concerns over Russia's potential control of the routes for exporting Kazakh oil (Petersen 33).

The "thread" built by the Caspian Pipeline Consortium from the city of Atyrau in Kazakhstan to Novorossiysk in Russia is one of the longest pipelines in the region. Initially, Western companies operating in Kazakhstan, specifically Chevron, intended to build and manage the pipeline according to international standards, excluding Transneft from its operators. However, these plans were only partially realized. Currently, Transneft oversees the Russian segment of the project; however, the monopolistic pricing system employed by this company for their Russian network does not extend to the entire pipeline (Petersen 34). In brief, Russia's previous dominance over the oil industry in this area has significantly reduced. In Kazakhstan, Russian companies, led by Lukoil, are investing in hydrocarbon production alongside Western oil companies and their own Kazakh state companies (Saurbek 80).

Russia was interested in Kazakhstan supplying oil exclusively via the northern route, passing through Russian territory. This was a matter of significant political importance in addition to the economic advantages. Pipelines remained a crucial tool to exert influence on the Caspian countries. For this reason, Russia expedited the construction of the Caspian Pipeline Consortium (CPC) oil pipeline (Tengiz-Novorossiysk). In November 2001, the commissioning of the first phase of the CPC pipeline was signed during a ceremony. The commissioning of the pipeline was a significant geopolitical achievement for Russia in the Caspian Sea, granting them the right to transport Kazakhstan's oil. This move not only solidified Russia's position in the region but also fostered an improved relationship with Kazakhstan. Additionally, an agreement was reached to expand the CPC's capacity to transport up to 67 million tons of oil annually. Later, a long-term intergovernmental agreement was signed, whereby the Kazakh side was guaranteed the capacity to transport a minimum of 15 million tons of oil annually from Atyrau to Samara (Zhiltsov 39).

Gazprom has collaborated with KazMunaiGas in the gas sector since 2002. Nevertheless, no long-term agreement between Russia and Kazakhstan has been signed yet, unlike the ones in existence with Uzbekistan and Turkmenistan. Russia underestimates the significance of this document for the Kazakh side, as the conclusion of such an agreement would significantly influence the gas industry's direction in Kazakhstan. There is, however, a

possibility that the Russian leadership is intentionally doing so in order to control the initiatives of the management of KazMunayGas. This has prompted Kazakhstan to reconsider its reliance on Gazprom and consider investing in its own infrastructure or partnering with foreign companies. However, Lukoil still holds a considerable stake in the current primary project – the Karachaganak field's advancement (EY 5).

In the gas sector, Russia's monopoly endured for an extended period. By purchasing gas from Central Asia and transporting it through its pipeline system, Russia prevented the countries of the region, particularly Kazakhstan, from accessing profitable markets independently (Petersen 43). In 2005, Russia declared the shift to "European market prices" for gas exports to CIS nations and started raising prices for countries like Ukraine. Nevertheless, it wasn't until 2008, once the likelihood of alternative customers emerging in Kazakhstan materialized, that Russia proposed buying gas from this area at a higher rate. In 2010, a new agreement was signed with Turkmenistan and Kazakhstan for the extension and modernization of the main pipeline – which has been operational since Soviet times – that transports gas from these countries to Russia. This indicates Moscow's intention to secure gas resources in Central Asia for the future (Malashenko 25-26).

Russia signed these agreements when it did not require Kazakh gas, thus showing its readiness to forego short-term profits for the sake of long-term strategic objectives. With the decrease in gas demand in Europe due to the financial and economic crises of 2008-2009, Russia no longer required Central Asian gas to satisfy domestic needs or contracts with Ukraine. Furthermore, soon after signing multiple new long-term agreements with the producing nations of the Caspian Sea, which stipulated procurement of substantial amounts of gas at twice the previous price, Russia ceased its acquisition of gas from Central Asia almost entirely (Petersen 42-43).

On 8th January 2023, Gazprom CEO A. Miller and First Deputy Prime Minister of Kazakhstan R. Sklyar conducted a working meeting in St. Petersburg. The parties discussed their cooperation progress and future prospects. At the meeting A. Miller and R. Sklyar signed a roadmap for cooperation in the gas sector. The press office of the Kazakh government simply stated that the roadmap outlines the primary areas of cooperation between the parties, specifically regarding issues (Gazprom):

- The processing of Kazakh gas at the Orenburg gas processing plant (GPP),
- The potential for Russian gas supplies to Kazakhstan, and potential cooperation projects.

Two potential routes for supplying Russian gas are currently being investigated: the Barnaul-Rubtsovsk-Semey-Ust-Kamenogorsk route with a branch to Pavlodar, estimated to be approximately 1,000 km in length, and the Ishim-Petropavlovsk-Kokshetau-Nur-Sultan route, estimated to be 644 km long (Gazprom).

In August 2022, Gazprom and QazaqGaz (formerly KazTransGaz) began discussing the volume of gas supplies. Initially, the volume is set at 4 billion cubic meters per year, with the potential for an increase to 7-10 billion cubic meters per year. This takes into account the possibility of converting coal-fired thermal power plants to gas (Interfax Information Services Group).

Another area of collaboration between Gazprom and Kazakhstan concerns the processing of gas from the Karachaganak oil and gas condensate field (OGCF) at the Orenburg GPP. During SPIEF in June 2022, Gazprom Pererabotka and KazRosGaz, a joint venture with equal participation from Gazprom and KazMunaiGaz (with QazaqGaz overseeing KazMunaiGaz's share), agreed to augment gas processing at the Karachaganak OGCF over the 2022-2023 period. In addition, Gazprom and QazaqGaz signed a memorandum of cooperation that outlines plans to elevate processing to 11 billion m3/year (Alifirova).

Russian-Kazakhstan relations regarding gas issues were closely held throughout 2022. A new momentum to the negotiation process was initiated by the meeting of Russian President V. Putin and Kazakh President K.-J. Tokayev on 28 November 2022. During the ensuing meeting with Russian Prime Minister M. Mishustin, K.-J. Tokayev communicated that V. Putin suggested the formation of a trilateral union involving Uzbekistan. Later, Russian Deputy Prime Minister A. Novak stated that Russia, Kazakhstan, and Uzbekistan are exploring the possibility of establishing a gas union. This would entail collaboration on gas transportation, export, processing, and other areas of cooperation, such as gas supply to additional export markets including China (Gazprom).

Firstly, Russia holds a strong position in Kazakhstan due to its deep historical and cultural ties and close connections with the elites, which facilitate the achievement of long-term agreements. Secondly, unlike the case with China, the public's outlook toward treaties and negotiations with Russia is largely optimistic. Finally, the significant level of trade and integration initiatives between Russia and Kazakhstan fosters close relations between the two nations.

Russia's uncertain standing in Kazakhstan is due to its involvement in the 2021 conflict with Ukraine. Given the historical and cultural ties and the high density of Russian-speaking residents in Kazakhstan, along with the violent events of January 2022 and separatist factions in Northern Kazakhstan, Kazakhstan must carefully navigate its relationship with Russia, especially considering their shared land border.

Russia's main goal is to obstruct Caspian Sea nations from finalizing agreements with Western clients, especially in Europe, which is considered Russia's sales market. The belief is that if it's not possible to prevent Kazakh oil and gas exports without using Russian territory, redirecting them towards the East is preferable to the West. This strategy aims to avoid challenging Russian fuel dominance in the critical European market. Specifically, Russia seeks to hinder the proposed European pipeline, the "Southern Corridor", designed to deliver Caspian gas directly to EU countries.

Despite all these efforts, Russia's position in Kazakhstan, inherited from the USSR, has weakened over time. The influence of other players is increasing in Kazakhstan. Today, Kazakhstan has become the focus of strategic, political, and economic interests, not only for Russia but also for China.

Conclusion

In conclusion, this paper has conducted a comprehensive comparative analysis of China and Russia's energy policies in Kazakhstan, shedding light on the evolving international context in the region. The intricate dynamics of this context not only justify but also encourage Kazakhstan to foster external partnerships, particularly in the realm of energy trade, where China and Russia stand as the primary purchasers. As Kazakhstan positions itself as a crucial player in the global energy landscape, the study aimed to assess its energy potential and scrutinize the foreign policy priorities of China and

Russia within the country. Additionally, the research sought to identify areas of competition and potential geopolitical changes, especially considering China's growing strength and Russia's evolving influence.

The evaluation of Kazakhstan's energy potential revealed its significant role in the global energy arena, with abundant resources and reserves that attract continued foreign investment. As an active participant in the international community, Kazakhstan's contributions to the global energy balance and security underscore its responsibility to ensure international stability and security. The country's vast oil and gas reserves, coupled with its strategic geographical position, make it a key player in the energy sector, with over 80% of its oil production being exported. The emphasizes the importance of energy policies in shaping its economic trajectory.

China, driven by deepening economic ties and its growing energy needs, has become the largest market, investor, and creditor for Kazakhstan. However, challenges such as inefficient investments and corruption scandals have impacted the efficiency of Chinese projects, potentially hindering relations. Nevertheless, the collaborative relationship between China and Kazakhstan is anticipated to thrive, given their strong economic ties and shared energy interests.

On the other hand, Russia, leveraging its historical ties and close connections, has effectively maintained a monopoly in energy transit across the Eurasian region, providing Moscow with substantial political leverage. The historical and cultural links, along with positive public sentiment, contribute to the strong relationship between Russia and Kazakhstan. However, uncertainties arise due to Russia's involvement in the 2021 conflict with Ukraine, necessitating careful navigation of their shared border and relationship.

In summary, this study contributes a nuanced understanding of the energy policies of China and Russia in Kazakhstan, offering insights into the geopolitical landscape and potential future developments. The findings emphasize the need for Kazakhstan to navigate its external partnerships judiciously, considering the evolving dynamics of its relationships with China and Russia.

Conflict of Interest Statement

There is no conflict of interest with any institution or person within the scope of this study.

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