



an effective political coup. The situation only calmed down when Moscow came down on Tokayev's side and a contingent of the Collective Security Treaty Organisation's (*de facto* Russian) troops arrived in Kazakhstan at Tokayev's request.<sup>1</sup>

The incumbent president won the confrontation within the power elite and became the undisputed political leader of Kazakhstan. He freed himself from the influence

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of Nazarbayev, who had 'anointed' him as the head of state three years earlier. The January events led to the marginalisation of the first president and the weakening of his 'family' (not just his blood relatives, but also the inner circle of politicians and businessmen who had been in power for over 30 years). In addition, it was the first time when the society of Kazakhstan had wielded such clear influence on the political situation in the country. The riots also strengthened Russian influence in Kazakhstan, albeit for a short time.

Russia's full-scale invasion of Ukraine shook the post-Soviet area. This was the first time when Moscow had militarily undermined the order established after the collapse of the USSR on such a scale. This means that it is no longer seen as a guarantor of stability in Central Asia, but rather as the most serious threat to the region.<sup>2</sup>

The aggression of 24 February 2022 escalated Kazakhs' fears about their own sovereignty, and made it clear to both the country's leaders and the Kazakh public that the threats to the territorial integrity of their state are real. These are linked to recurring Russian claims to Kazakhstan's northern *oblasts*, which are densely inhabited by ethnic Russians. Since the West and China became politically involved in the war, the conflict has been internationalised. The attack on Ukraine revised Kazakhstan's existential challenges regarding its conduct of a sovereign foreign policy, but has also given it an opportunity to strengthen its vectors other than the Russian one.

### Relative stabilisation of the domestic situation

Now that a year and a half has passed since the serious political crisis, Tokayev's consolidation of power seems to be relatively stable. It has been formally legitimised by the citizens in a series of 'plebiscites' (elections and a referendum) without major protests. The tension within the elite was eased by legally and symbolically stripping Nazarbayev of his status. He lost his function as the head of the Security Council, and the capital of Kazakhstan regained its previous name (it had been renamed Nur-Sultan between 2019 and 2022 in his honour). The former leader's relatives and entourage were removed from their positions in public life, and his family have also lost their personal and economic immunity. Generally, however, the post-January repressions aimed at Nazarbayev's financial and political base were only selective. Karim Masimov, the former head of the security service, faced charges of organising the demonstrations; he was sentenced to 18 years in prison on charges of attempting a coup d'état.

Tokayev had already presented a state reform programme titled 'New Kazakhstan' back in March 2022. It assumed a controlled liberalisation of the authoritarian system of government by strengthening the role of parliament and local governments.<sup>3</sup> In fact, the changes were limited to reshuffles and rejuvenation of the administrative personnel. As a result of the parliamentary elections in March 2023,

<sup>1</sup> K. Strachota, 'Kazakhstan: the CSTO intervenes, the protests pacified', *OSW*, 10 January 2022, [osw.waw.pl](https://osw.waw.pl).

<sup>2</sup> M. Szymański, K. Strachota, 'Erosion of the post-Soviet system in Central Asia', *OSW Commentary*, no. 471, 30 September 2022, [osw.waw.pl](https://osw.waw.pl).

<sup>3</sup> W. Górecki, 'Tokayev's Perestroika. Kazakhstan in the face of internal and external challenges', *OSW Commentary*, no. 456, 21 June 2022, [osw.waw.pl](https://osw.waw.pl).

the political scene expanded to include people from outside the current circle of power, but they only attained their positions as a result of co-optation rather than achieving any success in real competition. The moves towards democratisation which the president announced also failed to take place.

Over the past 18 months, Tokayev has been strengthening his legitimacy with pro-social gestures. He withdrew the decision to raise LPG prices which had sparked the

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January protests; he also set up the Qazaqstan Halqyna state charity fund, financed by contributions – most likely voluntary, yet compulsory – from oligarchs and transfers from other state funds. The narrative of a fairer redistribution of income was backed by reports that some of Nazarbayev’s relatives had had their assets confiscated.<sup>4</sup> Public acceptance of the president also improved because he did not use mass repressions against citizens after January 2022, and adopted a cautious stance on the Russian-Ukrainian war.<sup>5</sup> At the same time, the subjectivity of Kazakhstan is now emphasised in the state’s identity policy more strongly than during the previous leader’s rule through reference to concepts that enhance the ethnicity of the Kazakh part of the population. Therefore, the expenditure on ‘strengthening patriotism’ in the 2023 budget was increased almost fivefold,<sup>6</sup> and decolonisation from the Soviet legacy has now become an acceptable topic in academic discourse.<sup>7</sup>

## Revising foreign policy

Since the invasion of Ukraine Kazakhstan has adopted a double-track approach towards the Russian Federation. Astana’s goal has been to cautiously change the balance of power in its relations with its northern neighbour, and to minimise the threats it may face from that direction.

On the one hand, Astana has demonstrated far-reaching assertiveness towards Moscow; this was particularly striking given that Russia had largely contributed to Tokayev remaining in power at the beginning of 2022. Kazakhstan did not support Russia either at the level of official declarations or during the voting in international forums; as a rule, Kazakhstan abstained from voting, although last April it spoke out against suspending Russia in the UN Human Rights Council. In June 2022, Tokayev refused to recognise the so-called ‘people’s republics’ in the Donbas or the results of the ‘referenda’ concerning the territories of Ukraine controlled by the Russian Federation at that time. This was quite spectacular because he did so while actually in the presence of Vladimir Putin in St. Petersburg. Both the Kazakh government and public became even more estranged from Moscow due to a succession of statements from Russian politicians undermining the sovereignty and borders of present-day Kazakhstan,<sup>8</sup> as well as Moscow’s energy blackmail in response to Astana’s assertive stance.<sup>9</sup>

<sup>4</sup> ‘Суд в Казахстане обязал Болата Назарбаева вернуть государству 31,9% акций Алматинского завода тяжелого машиностроения’, *Настоящее Время*, 16 March 2023, [currenttime.tv](https://currenttime.tv).

<sup>5</sup> According to a survey by Demoscope entitled ‘What people in Kazakhstan think about the war in Ukraine’, published in May this year, almost 60% of the respondents expressed a neutral attitude towards both the Russian Federation and Ukraine. This percentage had remained at a similar level since last November. In May, over 21% of respondents supported Ukraine, and less than 13% the Russian Federation. Tokayev was supported by 75% of the respondents. See ‘What people in Kazakhstan think about the war in Ukraine’, *Demoscope*, 17 May 2023, [demos.kz](https://demos.kz).

<sup>6</sup> Д. Алтынгали, ‘Почти пятикратно увеличат расходы на укрепление патриотизма в Казахстане’, *Капитал*, 27 February 2023, [kapital.kz](https://kapital.kz).

<sup>7</sup> See for example A. Мустояпова, *Декolonизация Казахстана*, Almaty 2002.

<sup>8</sup> Russian senior officials, such as Dmitri Medvedev, repeatedly questioned the sovereignty and borders of Kazakhstan at the turn of last August.

<sup>9</sup> In 2022, the Russian side interrupted Kazakh oil transport via the main export route to the West running through the terminal in Novorossiysk on four occasions. These breaks did not have any major impact on the annual use of this route. Transport via this route decreased by 1% y/y, to 51.99 million tonnes.

On the other hand, the country has ostentatiously avoided making any confrontational moves towards the Kremlin. For example, Moscow was the first place Tokayev visited after being re-elected last November. He also joined other Central Asian leaders for the 2023 Victory Day celebrations in the Russian capital.

Above all, however, Kazakhstan has gained importance as an economic partner and transit country for Russia. 2022 saw a sharp rise in exports from Kazakhstan to Russia,<sup>10</sup> largely because Russian

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entities have – with its permission – used Kazakhstan to circumvent the Western sanctions regime. This is possible due to the customs and trade facilitations existing between the two countries as a result of their participation in joint initiatives such as the Eurasian Economic Union (EAEU). At the same time, Astana has categorically ruled out the option of using the existing cooperation platforms (such as the EAEU and the CSTO) as mechanisms for further political integration, which Tokayev emphasised during the EAEU forum in May this year.<sup>11</sup>

In this way Kazakhstan has managed to distance itself politically from Russia while at the same time strengthening its position in their bilateral relationship. This was coupled with the expansion of foreign policy in other directions (especially towards China and the West). Astana’s role as a partner for the global powers has also increased partly as a consequence of the search for new transport routes and the increased interest in Central Asia’s energy sector (raw materials and infrastructure).

For example, Kazakhstan accepted, the EU’s offer to expand the Trans-Caspian International Transport Route (known as the ‘Middle Corridor’) and use it on a limited scale to increase oil exports to the EU. As a result, the state has attracted investments, for example, to develop the ports on the Kazakh coast of the Caspian Sea. The EU’s increased interest in developing relations with Astana was fostered by repeated declarations (also addressed to the US) that Kazakhstan respects the sanctions regime against the Russian Federation even though it does not support it.

China’s role in Kazakhstan’s foreign policy has grown immensely. The events of 2022 escalated China’s fears about the stability of its western neighbourhood, and offered an opportunity to bolster its position against Moscow. As Russia becomes increasingly isolated, Kazakhstan has become an indispensable partner to China in its efforts to ensure secure trade routes to the West. Tokayev sees China as a counterbalance to and protection against Russia, and also as an appealing investor and trading partner.<sup>12</sup> Xi Jinping’s public assurance of support for Kazakhstan’s sovereignty and territorial integrity, formulated in Astana in September 2022, was a manifestation of the strengthening of the two countries’ mutual relations. It was undoubtedly intended to reduce Russian pressure on its neighbour, and at the same time it revealed Beijing’s growing ambitions regarding the region. China and Kazakhstan also introduced mutual visa facilitations, which were approved in May this year during Tokayev’s visit to the China-Central Asia summit in Xi’an.<sup>13</sup> These provoked several small demonstrations in Kazakhstan, but they were quickly suppressed. Although these and other similar protests prove that anti-Chinese sentiments are present among the Kazakh public (driven by fears about

<sup>10</sup> Trade volume rose by 6% y/y to U\$26.1 billion. This was driven by exports, which rose by 25.1% y/y. Over the same period imports fell by 1.5%.

<sup>11</sup> Д. Сотников, ‘Токаев назвал шуткой предложение войти в союз РФ и Беларуси’, Deutsche Welle, 29 May 2023, dw.com.

<sup>12</sup> In 2022, the total trade volume between Kazakhstan and China stood at \$24.1 billion, which means a 34.1% increase y/y. Exports from Kazakhstan to China rose by 34.7% y/y and reached \$13.2 billion, and imports grew by 33.5%, to \$11 billion.

<sup>13</sup> In January 2023, Kazakhstan cancelled the so-called visa-run and facilitations in extending stays for Russians on its territory. O. Auyezov, ‘Kazakhstan ends unlimited stay for Russians’, Reuters, 17 January 2023, reuters.com.

the possible purchase of land or Astana's asylum policy towards ethnic Kazakhs living in China), these sentiments have not affected political relations between the two countries. During the May summit, both Xi and Tokayev declared that each of the countries had to deal with their own internal affairs independently. This is confirmed by the fact that Kazakhstan does not actually interfere with China's policy towards the Muslim minority in Xinjiang.

## The powder keg

The most important challenges Tokayev faces include maintaining control over the political & business elites and consolidating them around his person. Most of these people made their careers while Nazarbayev was in power. Tokayev played an important role in this group when he served as prime minister and the head of diplomacy, but he was not a leading figure. He also did not build up his own base, something which has changed only slightly since Nazarbayev 'nominated' him president in 2019. Although the personnel reshuffle initiated last January has helped Tokayev keep control of the state apparatus and ensure its loyalty, oligarchs such as Dinara Kulibayeva (Nazarbayev's daughter) and her husband Timur (a former member of Gazprom's supervisory board) still have a strong influence on the country's business circles.<sup>14</sup> The previous leader's family, weakened but not deprived either of its domestic political influence or its contacts in Russia, may call the power of the current president into question and provoke conflicts within the elite. Since the process of confiscating their assets is likely to continue, the risk of this scenario materialising is growing.

The social situation in the country remains tense. Inflation remains high,<sup>15</sup> and the public mood is getting worse as people are unable to fulfil their aspirations to the

**Further tension inside Kazakhstan's political and financial elite, regional protests over social issues and an escalation of separatism among the Russian minority cannot be ruled out in the near future.**

changes they had been promised.<sup>16</sup> People have repeatedly taken to the streets to protest against the lack of jobs in the 'oil-producing' western part of the country, which was the heart of the stormy demonstrations of 2022. The protest by the oil sector workers escalated in spring this year, as they gathered in front of the energy ministry's headquarters in Astana. Although those demonstrations were suppressed, they turned out to be so effective that the government started talks with the protesters. Most of them accepted job offers in the new plants. The way the situation is developing shows that these protests are taking more effective forms. However, given the limited liberalisation of public life, the absence of any instruments that would allow this kind of tension to be defused is a serious problem in Kazakhstan's political system.

The Russian invasion of Ukraine has placed a new burden on Kazakhstan's identity problems. Its citizens make up a multinational society, and some of the groups therein find it difficult to identify with the state, something which is becoming a major socio-political issue. Moscow's moves have triggered a growing sense of patriotism in the country which draws upon Kazakh nationalism. This has been facilitated by both the government's policy and the negative perception of the Russian invasion among the Kazakh public. This increasing nationalism may lead to conflict between the Kazakh majority and the Russian minority (around 15%). The most extreme manifestation of the problem with the Russian

<sup>14</sup> According to Forbes Kazakhstan's estimates, their joint assets were worth \$8.6 billion this year. See '50 богатейших бизнесменов Казахстана – 2023', 11 May 2023, forbes.kz.

<sup>15</sup> It reached its peak (22%) in February this year and then fell to 16.8% in April. At the end of 2022, it was running at around 20% on average, and 25% in the case of groceries. According to data for IQ 2023, on average citizens spend 51.3% of their income on food.

<sup>16</sup> Average real salary in April this year rose to around \$370, while purchasing power fell by 5.2% compared to the same period last year. In a 2022 survey, almost one in three respondents described themselves as a 'poor worker'. Kazakhstan is an example of a relative economic success in the post-Soviet area; its residents are the second richest society in this area after Russia (excluding the Baltic states).

minority's loyalty was seen in March this year in Petropavlovsk in the north of the country, where a so-called 'people's council' announced its intention to secede from Astana's control. Although this was considered as just a one-off incident, the declaration revived discussions about the attitude of the Russian community.<sup>17</sup>

## Torn between Moscow and Beijing

The challenges linked to Kazakhstan's move to a more autonomous foreign policy, which emerged in 2022, still need to be addressed. The most important of these concerns how to defend the state against the Russian Federation, which could destabilise the internal situation in Kazakhstan by escalating manifestations of separatism among the Russian minority or creating a conflict inside its political and business elites. The threat that the transmission of Kazakh oil (which accounts for over a third of budget revenues) through the terminal in Novorossiysk will be blocked is less real than last year because Astana has since become one of Moscow's key trade partners (intermediaries). At the same time, the permanent destabilisation of the situation in Russia poses a threat to Kazakhstan. This was manifested during Yevgeny Prigozhin's mutiny, when Tokayev supported Putin but stated that the rebellion was Russia's internal affair.

Kazakhstan's current foreign policy dilemmas also manifest themselves in the sector of energy, and especially gas. Since last autumn Moscow has intensified its efforts

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in this area and proposed a 'gas alliance' to Kazakhstan and Uzbekistan. Its offer envisages the construction of a new gas pipeline running through Kazakhstan to China or using Kazakhstan's and Uzbekistan's existing transport infrastructure to transmit Russian gas. The threat inherent in this proposal is that Russia could gain control over critical sectors of the two countries' economies, so both Kazakhstan and Uzbekistan reacted to the offer with scepticism. For the time being, it is only being considered in terms of fuel supplies for the domestic needs of both countries.<sup>18</sup> Lucrative as Russia's offer may be – as it could satisfy Kazakhstan's real needs (an increase in domestic consumption and the continuing agreement with China) – it still poses the risk of its gas trade being politicised by Moscow.

Astana also has a dilemma about how to develop its relations with Beijing. Currently, this relationship provides a beneficial counterweight to the contact with the Russian Federation, and the Kazakh government has so far successfully neutralised the threats to the state's sovereignty which they entail. China has been making attempts to increase its political influence in the region, as evidenced by the China-Central Asia summit held in Xi'an in May this year. However, it seems doubtful that China has the necessary capabilities to aspire to replace Russia as a guarantor of security in the region. Therefore, it is unclear what the outcome of the ongoing revision of both powers' attitudes towards Astana and the region will be. Each of them can compete with the other and coordinate their own actions, and they are especially able to inhibit the activity of the West. Given the fact that Kazakhstan has had more room for political manoeuvre since spring, as a transit country it can now reap the economic benefits from the activation of both of the big players. In turn, this means that if Kazakhstan fully accepted the Russian gas proposal, which would envisage the construction of a pipeline to China running through its territory, it would lose its trump cards in its contacts with both Beijing and

<sup>17</sup> 'Трое «участников нарсвета», «провозгласившего независимость», заключены под стражу на два месяца', Radio Azattyq, 21 April 2023, [rus.azattyq.org](http://rus.azattyq.org). A woman from Petropavlovsk was sentenced to three years in prison on 30 May this year on charges of separatism, and two residents of Uralsk were sentenced to five years on 6 June.

<sup>18</sup> Kazakhstan's energy minister noted that there were plans to build a new gas pipeline running to the eastern part of the country. At the same time, the media reported that Moscow had offered Astana a lower price than the prices envisaged under preferential contracts with Belarus.

Moscow. It will probably sign contracts with Russia for the construction of new pipelines and supplies of Russian gas; these supplies will let Kazakhstan allocate a sufficient amount of gas to comply with its obligations under its lucrative export contracts with Beijing, but it will use the existing transport infrastructure to do so.

The EU and the US are also important vectors of Astana's foreign policy, since the relationships with them allow the 'duopoly' of Moscow and Beijing to be weakened to a certain extent. However, any form of cooperation with the West that would really change Kazakhstan's situation (for example, by increasing oil sales to the EU via alternative routes) is a matter for the distant future. In addition, tightening ties with the West will certainly provoke negative reactions from both Russia and China.<sup>19</sup>

Astana's approach to complying with the Western-led sanctions regime is typical as regards its relations with the West and the Russian Federation. Despite Tokayev's assurances that the sanctions would be respected, the territory of Kazakhstan is one of the main routes Russia is using to circumvent the restrictions.<sup>20</sup> Therefore, Astana has been holding intensive dialogue with both Brussels and Washington (who claim officially that they understand Kazakhstan's position, given the scale of its economic ties with Moscow). For the time being, this dialogue has not provoked any retaliation from the Russian Federation. If this state of affairs continues, however, there is a risk that Kazakhstan will come under greater pressure to comply with the restrictions; during their visit to Astana at the end of April, representatives of the EU and the United States for sanctions made any future cooperation with Kazakhstan conditional on the effectiveness of its efforts in this area.<sup>21</sup>

## Forecasts

It can be said that the current relative stability of Kazakhstan's internal situation is conditional. Tensions within the political and financial elite cannot be ruled out, especially those linked to the potential conflict between the inner circles of Tokayev and Nazarbayev. We can also expect regional protests over social issues and more trouble caused by the Russian minority. The risk that each of these challenges separately will seriously threaten the state is quite low; a serious problem would arise if they overlapped, and most of all if they became part of the gamesmanship of external powers.

The domestic situation, and even more the international dynamics, show that the process of transformation taking place in Kazakhstan is not complete. Considering Tokayev's relative successes, Moscow's future policy towards Astana is the biggest political wild card, and this is something the Kazakh government has no control of. It will depend on both the outcome of the war in Ukraine and the situation in Russia itself. This is the factor that will determine the strength and nature of the challenges Kazakhstan will need to face as regards the Russian minority and the attitude of the old elite, who retain strong links with the Russian Federation. Furthermore, it will affect the behaviour and capabilities of China and the West. Astana will continue to try to capitalise on its 'buffer' position by avoiding any conflicts or binding commitments (such as final decisions on the gas pipeline to China), balancing the different vectors of its foreign policy, and emphasising its own role in the development of the transport routes. This strategy has a chance of success – if the main external players maintain their moderate approach towards Astana. However, it would become unsustainable in the event of a dramatic escalation of tension which deprives Kazakhstan of its current room for manoeuvre.

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<sup>19</sup> In March, Xi Jinping and Vladimir Putin made a joint statement including an assertion that they would counteract any 'colour revolutions' in Central Asia.

<sup>20</sup> In 2022, the total exports of goods from the EU to Kazakhstan reached a record value of \$32.3 billion (a 27.6% increase y/y).

<sup>21</sup> They set a 'red line' in the form of the export or re-export of computer chips and integrated circuit components used in the production of missiles and drones. Bloomberg reported a record high re-export of such devices to the Russian Federation in 2022. A. Nardelli, 'Russia Is Getting Around Sanctions To Secure Supply of Key Chips for War', 4 March 2023, [bloomberg.com](https://www.bloomberg.com).