

REVISITING INDIA'S ENERGY SECURITY: *Strategic Engagement with Kazakhstan in a Changing Eurasian Order*

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Abstract

India's energy security challenge defined by chronic import dependence, an underdeveloped nuclear sector, and a growing critical minerals deficit demands engagement with Kazakhstan that is commensurate with the strategic stakes involved. Kazakhstan possesses approximately 40 percent of global proven uranium reserves, 30 billion barrels of oil, and 15 of 17 known rare earth elements, making it an irreplaceable node in India's expanded energy calculus. Since formal diplomatic relations were established in 1992, the two countries have built successive layers of energy cooperation: civil nuclear agreements from 2009 onward, ONGC Videsh's equity stake in the Satpayev oil field, and, most recently, long-term uranium supply and critical mineral agreements formalised in 2025–2026. Drawing on the foundational scholarship of Chapter Three of 'India's Energy Security in Central Asia' and situating it against the dramatically altered post-2022 Eurasian order, this article argues that the conditions now exist perhaps for the first time for India to transform a strategically important but structurally shallow relationship into a comprehensive, institutionally anchored energy partnership. The article maps India's energy imperatives, Kazakhstan's resource endowment and foreign policy doctrine, the full spectrum of bilateral cooperation, the connectivity challenge, and a forward policy framework.

Keywords: India energy security, Kazakhstan, uranium supply, Kazatomprom, INSTC, critical minerals, ONGC Videsh, Satpayev, Chabahar, multi-vector foreign policy, SCO, Eurasian connectivity

Introduction: The Energy Imperative and Kazakhstan's Place in It

Energy security constitutes a structural foundation of Indian statecraft, underpinning economic growth, poverty alleviation, military modernisation, and great-power aspirations. Yet India's energy profile remains marked by a widening gap between domestic supply and rising demand. The country imports nearly 85 percent of its crude oil and about 60 percent of its natural gas, making it highly vulnerable to external shocks. Despite operating 25 nuclear reactors across seven sites, nuclear power contributes less than 3 percent of total electricity generation. At the same time, India's per capita energy consumption is roughly one-fifth of the global average, underscoring both developmental deficits and the scale of future demand expansion. With energy demand projected to grow significantly in the coming decades, ensuring stable, affordable, and diversified energy access has become a strategic necessity rather than a policy choice.

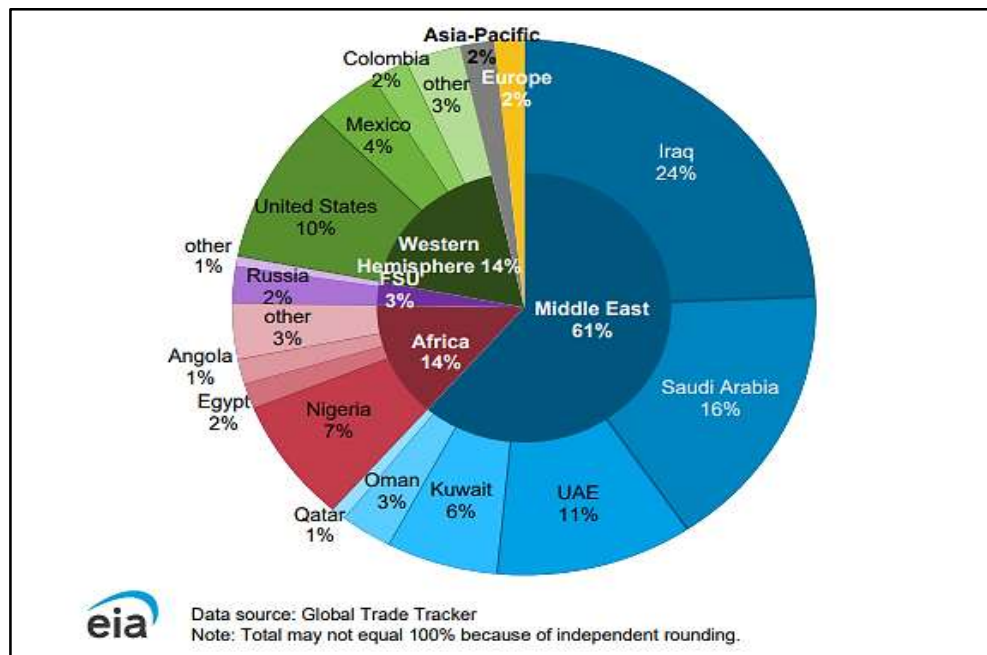
Within this context, Kazakhstan occupies a position of latent but underutilized importance in India's energy strategy. Rich in hydrocarbons and the world's largest producer of uranium, Kazakhstan offers critical resources that align with India's long-term energy needs. However, despite early recognition of its strategic value, India-Kazakhstan engagement has remained limited, with cooperation largely confined to uranium supply agreements and modest hydrocarbon investments. This article revisits the partnership in light of two

transformative developments: India’s expanding energy ambitions under the Viksit Bharat 2047 vision—including the target of 100 GW nuclear capacity by 2047 (from about 8.88 GW at present) and the launch of the National Critical Mineral Mission (₹34,300 crore outlay over seven years)—and the restructuring of Eurasian geopolitics following the 2022 Russia-Ukraine conflict. These shifts create a strategic window for deepening bilateral cooperation, positioning Kazakhstan as a key partner in India’s efforts to diversify energy sources, reduce geopolitical risks, and strengthen its presence in the Eurasian region.

India’s Energy Security: Imperatives, Vulnerabilities and the 2047 Horizon

India’s energy security dilemma is rooted in a structural imbalance between rapid economic growth and limited domestic resource availability. Since the economic reforms of 1991, which propelled India to become the world’s fifth-largest economy (GDP) and third-largest in PPP terms, energy demand has expanded far beyond domestic capacity (Kwaśnicki, 2011). The total primary energy supply (TPES) stood at 882 Mtoe in 2017, of which only around 554 Mtoe (nearly two-thirds) was met through domestic production. Coal continues to dominate the energy mix, particularly in power generation, while oil and gas remain heavily import-dependent. India imports roughly 71-85 percent of its crude oil and became a net importer of natural gas in 2004 (International Energy Agency, 2019). This dependence is further aggravated by geographical concentration: about 61 percent of crude imports come from the Persian Gulf, with Saudi Arabia contributing nearly 16 percent, while post-2022 shifts have led to Russia accounting for 35-40 percent of imports (see figure 1). Projections suggest that oil import dependence could approach 90 percent by 2040, underscoring the depth of India’s vulnerability and the urgency of diversification.

Figure 1: India’s Country wise Imports of Crude Oil (2021)¹



India’s nuclear energy ambitions represent a critical pathway to reduce this dependence, yet they introduce a parallel vulnerability in uranium supply. Historically constrained by technological isolation following the 1974 Pokhran test and later by the Civil Liability for Nuclear Damage Act (2010), India’s nuclear sector received a

¹ Source: U.S. Energy Information Administration.

boost after the 2008 Indo–US nuclear agreement and NSG waiver, which enabled access to global fuel markets. However, the fragility of domestic uranium supply was evident when nuclear generation declined by over 12 percent between 2006 and 2008 due to fuel shortages. Today, India operates with an installed nuclear capacity of approximately 8.88 GW, but the Union Budget 2025–26 sets an ambitious target of 100 GW by 2047, alongside a ₹20,000 crore allocation for Small Modular Reactors (SMRs) and reforms to enable private sector participation (Oak & Budhwar 2025). India’s uranium reserves-estimated at around 78,000 tonnes (about 0.8 percent of global reserves) -are insufficient for long-term expansion, potentially supporting only about 10,000 MW of capacity. Given projections that nuclear energy could contribute up to 25 percent of electricity generation over the long term, securing reliable uranium imports becomes indispensable, positioning Kazakhstan-a leading global uranium producer-as a strategic partner.

A newer dimension of India’s energy vulnerability lies in its dependence on critical minerals essential for the clean energy transition. Technologies such as solar panels, wind turbines, electric vehicles, and advanced defence systems rely on minerals like lithium, cobalt, nickel, and rare earth elements (REEs). India’s dependence is stark: 93 percent of rare earth magnet imports came from China in FY 2024-25, with domestic stockpiles reportedly sufficient for only two to three weeks following China’s export restrictions in April and October 2025. Globally, China controls nearly 70 percent of refining capacity across 19 key strategic minerals, according to the IEA’s Global Critical Minerals Outlook 2025. In response, India launched the National Critical Mineral Mission (NCMM) in January 2025, with an outlay of ₹34,300 crore over seven years, alongside a ₹73 billion scheme for rare earth permanent magnet production targeting 6,000 MTPA capacity (Krishnamurthy, 2026). While these initiatives aim to build domestic resilience, they cannot substitute for diversified external supply chains. In this evolving context, Kazakhstan’s resource endowment-including uranium and critical minerals-assumes growing strategic importance in mitigating India’s emerging energy and technological vulnerabilities.

Table 1: India's energy security challenges and Kazakhstan's structural relevance

Energy Challenge	Current Status	2047 Target / Projection	Kazakhstan's Role
Nuclear capacity	8.88 GW (3% of electricity)	100 GW (Viksit Bharat)	Primary uranium supplier; ~80% of imports historically
Crude oil imports	~85% imported; 61% Gulf-sourced	Reduce concentration risk	Satpayev equity stake; egress route diversification
Uranium supply	Domestic reserves <1% of world	Massive scale-up needed	World's largest producer (~20% of global supply)
Rare earth elements	93% magnet imports from China (FY25)	Domestic supply chain via NCMM	15 of 17 known REEs; ICAREF joint ventures
Natural gas	Net importer since 2004; 4th largest LNG importer	Gas to 15% of energy mix by 2030	100 TCF reserves; pipeline development underway

Kazakhstan's Resource Endowment and Strategic Posture

Kazakhstan's energy geography places it at the centre of global resource politics, combining vast reserves with a strategically pivotal Eurasian location. The country possesses approximately 30 billion barrels of proven oil reserves, the second largest in Eurasia after Russia, with major fields such as Kashagan holding an estimated 9 billion barrels. In 2018, Kazakhstan produced over 91.2 million tonnes of oil, with output projected by OPEC to reach around 4 million barrels per day by 2040. Its natural gas reserves stand at roughly 85 trillion cubic feet (TCF), though infrastructure constraints have historically limited optimal utilization. More significantly, Kazakhstan dominates the global uranium sector: Kazatomprom produced 25,839 tonnes in 2025, accounting for about 20 percent of global supply, with projections of 27,500-29,000 tonnes in 2026. By 2021, the country contributed nearly 45 percent of global uranium production, supported by reserves estimated at around 15 percent of the world total (approximately 906,800 tonnes). In addition, Kazakhstan holds reserves of 15 out of 17 rare earth elements, alongside major deposits of chromium, manganese, titanium, and tungsten-resources increasingly critical in the clean energy transition (US Energy Information Administration, 2019).

Kazakhstan's ability to leverage these resources is reinforced by its multi-vector foreign policy, which seeks balanced engagement with all major powers to maximize strategic autonomy. This approach is reflected in its simultaneous partnerships: a strategic agreement with Russia (2025), \$17 billion in deals with the United States, a EU-Kazakhstan partnership backed by a \$13.2 billion investment package (2025), and expanding ties with Turkey and regional organisations such as the SCO, EAEU, CSTO, and OIC. For India, this diversified diplomatic posture presents a strategic opening rather than a constraint. As Kazakhstan actively seeks to broaden its partnerships with India, on the other hand India's growing economic capacity, nuclear expertise and connectivity initiatives-particularly via Chabahar Port-enhance its attractiveness as a partner. Recent high-level engagements, including discussions led by External Affairs Minister S. Jaishankar in 2026, underscore India's interest in long-term uranium supply, hydrocarbon cooperation, and deeper strategic ties, indicating a convergence of interests that could elevate Kazakhstan as a key pillar in India's evolving Eurasian and energy strategy.

The Architecture of Bilateral Energy Cooperation: Genesis, Development and Limitations

India-Kazakhstan relations were formally established following India's early recognition of Kazakhstan's independence in 1991, with diplomatic ties initiated in 1992 and embassies opened in Almaty (1992) and New Delhi (1993). The institutional backbone of the relationship was created through the Inter-Governmental Commission (IGC) in 1993, covering trade, energy, and technological cooperation (Stobdan, 2016). During the 1990s, India adopted a cautious approach in Central Asia, positioning itself as a non-threatening partner while navigating the dominant influence of Russia, China, and the United States. Despite recognizing Kazakhstan's vast energy potential-including significant oil and uranium reserves-India's engagement remained limited due to landlocked geography, weak connectivity, and infrastructure constraints, which restricted the translation of strategic intent into tangible investments (Meena and Singh, J. (2025).

The most substantive pillar of bilateral cooperation has been in the nuclear domain, particularly after the 2008 NSG waiver, which enabled India to access global nuclear fuel markets. Kazakhstan played a supportive diplomatic role in this process and subsequently became India's leading uranium supplier. In 2009, Kazatomprom and NPCIL signed an agreement for the supply of 2,100 tonnes of uranium (completed by 2014), followed by a 5,000-tonne agreement by 2019, and another 5,000-tonne contract signed during Prime Minister Modi's 2015 visit. By 2020, Kazakhstan had supplied approximately 9,000 tonnes of uranium, accounting for

nearly 80 percent of India’s external uranium supply, underscoring its centrality to India’s nuclear energy programme (Stobdan, 2020). Continued agreements, including the 2025-2026 long-term supply contracts, highlight the durability of this partnership. At the same time, India’s hydrocarbon engagement -led by ONGC Videsh Ltd (OVL)-has involved equity stakes such as a 25 percent share in the Satpayev block (estimated 1.75 billion barrels) and participation in projects like Alibekmol and Kurmangazi. However, these investments face a structural constraint: the absence of secure export routes, with most Kazakh oil transported via Russia-controlled pipelines, forcing India to sell its share regionally rather than directly importing it.

More recently, cooperation has expanded into the strategically vital domain of critical minerals, reflecting shifts in global supply chains and China’s tightening control over rare earth exports. The 4th India-Central Asia Dialogue (2025) marked a turning point, with India and five Central Asian states agreeing to collaborate on the exploration and development of rare earth elements and critical minerals. This initiative is institutionalized through the India-Central Asia Rare Earths Forum (ICAREF). Kazakhstan’s importance in this emerging sector is significant: beyond possessing reserves of 15 out of 17 rare earth elements, it also has existing extraction and processing capabilities, positioning it not just as a supplier but as a potential partner in value-added production. In the context of India’s rising dependence on imported critical minerals and its push under the National Critical Mineral Mission (₹34,300 crore), Kazakhstan represents a crucial frontier for deepening strategic and economic engagement.

Table 2: India-Kazakhstan bilateral energy cooperation -scope, status, and structural gaps

Cooperation Area	Key Agreements	Current Status	Outstanding Challenges
Civil nuclear / uranium	MOU 2009; supply deals 2009, 2015, 2019–24 renewal; long-term deal 2026	Active; ~80% of India's external uranium supply historically	Needs equity/JV upgrade; scale for 100 GW target
Oil & gas (equity)	Satpayev block 25% (2011); Alibekmol 25%; Kurmangazi 10%	OVL operational; production sold regionally	No direct India offtake corridor; CPC dependence
Critical minerals	4th India-CA Dialogue agreement 2025; ICAREF	Framework established; joint exploration planned	Processing infrastructure; route to India
Connectivity (INSTC)	Mundra–Bandar Abbas–Kazakhstan cargo March 2025	First commercial consignment completed	Missing rail links; Iran sanctions exposure
Nuclear reactor tech	PM Modi visits 2015, 2017; discussions on reactor construction	Exploratory; India proposed reactors in Kazakhstan	Legislative and commercial barriers in Kazakhstan
Bilateral trade	India–Kazakhstan IGC; Investment Forum 2019	Trade >\$1 billion; India largest CA partner	Payment systems; banking connectivity gaps

The Connectivity Challenge: Corridors, Constraints and the INSTC

The central constraint shaping India-Kazakhstan energy cooperation is geographical: the absence of a direct land border necessitates reliance on transit corridors through third countries, each carrying distinct geopolitical and logistical risks. The International North-South Transport Corridor (INSTC) has emerged as the most viable framework to address this challenge. Established in 2000 and spanning 7,200 km, the INSTC connects India to

Eurasia through a multimodal network via Iran and the Caspian region (Sachdeva, 2011). Studies indicate that it is approximately 30 percent cheaper and 40 percent shorter than the traditional Suez Canal route, reducing transit time from 45–60 days to around 23 days. By 2024, freight volumes reached 26.9 million tonnes, with 12.9 million tonnes transported by rail, reflecting growing operational viability. The corridor’s eastern branch has gained particular relevance: since March 2025, India has been shipping goods from Mundra Port to Kazakhstan via Bandar Abbas, while a landmark shipment in November 2025 saw cargo travel from Russia through Kazakhstan and Turkmenistan into Iran, demonstrating the corridor’s expanding connectivity. Complementing this, the 2024 India–Iran agreement on Chabahar Port (10-year tenure) strengthens India’s logistical access to Central Asia, though critical infrastructure gaps—such as the Rasht–Astara (205 km) and Chabahar–Zahedan rail links—remain to be completed for seamless integration.

Parallel to the INSTC, alternative routes present both opportunities and constraints. The Trans-Caspian International Transport Route (TITR), or Middle Corridor, offers a Russia-bypass pathway linking Kazakhstan’s Aktau port across the Caspian Sea to Baku, and onward through Georgia and Turkey, gaining prominence after 2022 amid shifting geopolitical alignments (Gogna, 2019). While primarily oriented toward European markets, it indirectly benefits India by diversifying Kazakhstan’s export options and reducing dependence on the Caspian Pipeline Consortium (CPC) route via Russia. In contrast, China-led Belt and Road Initiative (BRI) corridors provide faster connectivity but remain strategically untenable for India due to ongoing geopolitical tensions, including the Ladakh border dispute. China’s entrenched presence in Kazakhstan’s energy sector—evident in acquisitions such as Petro Kazakhstan (2005) and the successful bid for a stake in Kashagan in 2013, which India failed to secure—highlights the competitive environment India faces. Consequently, India’s connectivity strategy must balance economic efficiency with geopolitical prudence, making the operationalisation of INSTC and Chabahar not just a logistical necessity but a strategic imperative.

Table 3: India-Kazakhstan connectivity corridor comparison (as of April 2026)

Corridor / Route	Nodes	Estimated Transit	Key Risk Factor	India Priority
INSTC Eastern	Mundra → Bandar Abbas → Kazakhstan	~23 days	Iran sanctions exposure	High — first commercial use March 2025
INSTC Western (Caspian)	Mumbai → Bandar Abbas → Baku → Russia	25–30 days	Russia dependency; sanctions risk	Medium
Middle Corridor (TITR)	Aktau → Baku → Tbilisi → Turkey	18–25 days	Capacity constraints; Turkey transit	Medium — indirect benefit
Chabahar–Zahedan–CA	Chabahar → Zahedan → Afghanistan → CA	Pending rail completion	Railway unfinished; Afghan stability	High — strategic priority
BRI / China corridors	Via Xinjiang	Variable	Geopolitical — politically constrained	Low — politically unacceptable as primary

The Changing Eurasian Order: Strategic Shifts Since 2022

The post-2022 geopolitical landscape has significantly altered the strategic environment of Eurasian energy politics, particularly by weakening Russia's traditional role as a dominant transit gatekeeper. The Russia-Ukraine war (2022) and subsequent Western sanctions exposed vulnerabilities in Kazakhstan's reliance on Russian-controlled infrastructure, especially the Caspian Pipeline Consortium (CPC) route, which has historically handled the bulk of Kazakhstan's oil exports. Disruptions along this corridor highlighted the risks of overdependence, prompting Astana to accelerate diversification strategies. While IFRI's 2025 analysis notes that Russia continues to retain influence in Kazakhstan's energy and economic sectors, Kazakhstan has simultaneously pursued a more assertive multi-vector policy, evidenced by its refusal to recognise Russia's annexation of Ukrainian territories. For India, these developments create both opportunity and constraint: although reduced Russian leverage opens alternative pathways for engagement, sanctions complicate the use of Russian-linked transit routes, particularly for Indian firms integrated into global financial systems.

At the same time, China remains India's principal competitor in Kazakhstan, with deep structural advantages built over decades. China is Kazakhstan's largest trading partner, has invested heavily under the Belt and Road Initiative (BRI), and secured major energy assets, including the \$4.18 billion acquisition of Petro Kazakhstan (2005) and the construction of a 3,000 km oil pipeline to Xinjiang. However, China's dominance is not without constraints. Domestic concerns in Kazakhstan regarding Xinjiang-related ethnic issues, disputes over Transboundary Rivers such as the Irtysh and Ili, and Beijing's 2025 rare earth export controls have generated unease about overdependence (Dave, 2021). These tensions, combined with Kazakhstan's strategic diversification efforts, have created a broader opening for alternative partners. The EU's \$13.2 billion engagement package (2025) and the \$17 billion US-Kazakhstan agreements (November 2025) reflect intensifying external interest, but India occupies a distinct position. Its non-prescriptive engagement model, absence of geopolitical coercion, and strengths in nuclear technology, pharmaceuticals, IT, and connectivity initiatives like Chabahar align well with Kazakhstan's multi-vector strategy. This convergence presents India with a narrowing but significant window to deepen its presence in Kazakhstan's energy and critical minerals sectors.

Critical Minerals: The New Frontier of the Bilateral Agenda

The critical minerals dimension of India-Kazakhstan cooperation has emerged as a strategically decisive pillar, driven largely by China's assertive use of export controls in 2025, including restrictions on seven heavy rare earth elements (April 2025) and additional controls on processing technologies (October 2025), which led to global price spikes -European prices of key elements such as dysprosium and terbium rose to up to six times Chinese levels, disrupting industrial supply chains. India's vulnerability is acute: it imports 93 percent of its rare earth magnets from China, maintains stockpiles sufficient for only two to three weeks, and contributes less than 1 percent of global production despite holding around 12 percent of known reserves, highlighting a severe resource-production gap. While the National Critical Mineral Mission (₹34,300 crore) seeks to address domestic constraints, external partnerships remain indispensable. In this context, Kazakhstan offers a uniquely attractive alternative, possessing 15 of the 17 rare earth elements, established extraction capabilities, and a willingness to engage in value-added processing partnerships rather than mere raw material exports. Through the India-Central Asia Rare Earths Forum (ICAREF), launched under the 4th India-Central Asia Dialogue (2025), India is pursuing joint exploration, equity investments via KABIL, and technology collaboration in REE processing. If effectively operationalised, this partnership could help India build a China-independent

supply chain for critical minerals, a strategic necessity for its clean energy transition and defence modernisation.

A Policy Framework for Structural Partnership

India's future engagement with Kazakhstan must prioritise the institutionalization of the uranium partnership at a scale commensurate with its expanding nuclear ambitions. The 2025-2026 long-term uranium supply agreement, following earlier deliveries of approximately 9,000 tonnes by 2020 (around 80 percent of India's external supply), provides a foundation for deeper strategic integration. Rather than remaining a transactional buyer-seller relationship, India should pursue equity co-investment through NPCIL and the Department of Atomic Energy in Kazakh uranium mining projects, thereby creating long-term interdependence. Establishing a bilateral Uranium Cooperation Council could institutionalize coordination on supply security, technical collaboration, and planning for India's projected 100 GW nuclear capacities by 2047. Over time, cooperation could extend to fuel fabrication or enrichment partnerships, embedding Kazakhstan more deeply within India's nuclear value chain and enhancing supply resilience.

Equally critical is the acceleration of connectivity infrastructure linking the two countries, particularly through the International North-South Transport Corridor (INSTC) and the Chabahar Port agreement (2024, 10-year tenure). The INSTC has already demonstrated efficiency gains -30 percent lower costs and 40 percent shorter transit times, reducing delivery from 45-60 days to about 23 days, with 26.9 million tonnes of cargo handled in 2024. The March 2025 shipment from Mundra to Kazakhstan via the eastern corridor illustrates its operational potential, but scaling this into a reliable commercial route requires completion of key links such as the Chabahar-Zahedan railway and harmonization of customs and logistics systems. Parallely, the India-Central Asia Rare Earths Forum (ICAREF) must be strengthened to build critical mineral supply chains through joint exploration (via GSI), equity investments by KABIL, and technology partnerships in REE processing. A joint processing facility in Kazakhstan supported by India's ₹34,300 crore National Critical Mineral Mission and ₹73 billion magnets manufacturing scheme, could anchor a China-independent supply chain.

Finally, India should broaden the partnership by integrating financial and multilateral dimensions. Kazakhstan's National Fund, with assets of around \$60 billion, represents a significant source of sovereign capital that could be channeled into India's expanding energy sector, including Small Modular Reactors (supported by a ₹20,000 crore allocation), renewable energy projects, and connectivity infrastructure such as Chabahar. Such co-investment would create durable economic stakes that transcend political cycles. At the same time, embedding the bilateral relationship within multilateral frameworks-such as the SCO, CICA, INSTC, and the India-Central Asia Dialogue-would enhance resilience and regional legitimacy. India's \$1 billion credit line for Central Asia (2020) should be strategically deployed toward infrastructure projects that strengthen transit connectivity across Kazakhstan, Turkmenistan, and Iran, thereby transforming India-Kazakhstan energy cooperation into a cornerstone of a broader Eurasian strategy.

Conclusion: The Window, the Stakes, and the Imperative

The evolution of India-Kazakhstan energy relations reflects a long-standing gap between strategic intent and operational depth, shaped by constraints of geography, competition from Russia and China, and limited institutionalization. This article argues that, for the first time since the establishment of diplomatic ties in 1992, the conditions for bridging this gap have materially changed. India's domestic energy imperatives-including the target of 100 GW nuclear capacity by 2047, the launch of the ₹34,300 crore National Critical Mineral Mission,

and rising dependence on external energy sources-have made deeper engagement with Kazakhstan a structural necessity rather than a policy choice. Simultaneously, the post-2022 Eurasian geopolitical realignment has created a more favourable external environment: Russia's transit dominance has weakened, Kazakhstan is actively diversifying partnerships under its multi-vector policy, and China's dominance-though reinforced by investments such as the \$4.18 billion Petro Kazakhstan acquisition-is increasingly contested. Existing pillars of cooperation, including Kazakhstan supplying around 80 percent of India's external uranium (about 9,000 tonnes by 2020), India's 25 percent stake in the Satpayev oil block, the operationalisation of the INSTC Eastern Corridor (first commercial shipment in March 2025), and the emergence of the ICAREF framework, collectively provide a credible foundation. However, translating this into a durable strategic partnership requires building institutional depth through equity investments, connectivity infrastructure like Chabahar, joint processing facilities for critical minerals, and sovereign capital linkages. Ultimately, India's engagement with Kazakhstan will test its ability to act as a consistent and capable Eurasian partner; the opportunity is significant but time-bound, as competing actors with greater capital, proximity, or technological leverage continue to shape the region's strategic landscape.

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