



REPORT

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Russia's and China's Influence in Central Asia: Europe's Prospects, Concerns and Search for Balance

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About the report

This report provides an overview of the developments, processes, challenges and threats in Central Asia and the wider region around it – including terrorism, the rise of extremist Islamism, the deepening of authoritarian tendencies, human rights violations, erosion of democratic institutions and values, as well as environmental and climatic challenges. The region-wide threats addressed in this report include the information influence operations of the Russian Federation (hereinafter 'RF') and the geopolitical rise of the People's Republic of China (hereinafter 'PRC') in the region, as well as the hybrid activities of the Islamic Republic of Iran.

In addition, this report provides an overview of the geostrategic, economic and other interests and activities of the major players in the region, such as China, the US, the EU, Turkey and the RF. With Chinese investment and influence in Central Asia on the rise, the PRC's interests in the region continue to grow; however, the RF persists in its efforts to assert its influence in the region, which in recent years has been steadily in decline.

This report analyses each of the Central Asian countries, highlighting ongoing processes within each state, their domestic politics, regional and international relations. Relevant international and regional organisations to which the Central Asian states belong are also examined.

Introduction

Central Asia is a strategic region for various significant global powers such as the US, China, the EU, as well as regional actors like the RF, Iran, and Turkey. Global interest in the region centres on Central Asia's transit routes, mineral and energy resources, and trade opportunities.

In many ways, Central Asia represents a buffer between the West and the East, with their often conflicting political, social, ideological values and models. The geography, natural resources, and population of the Central Asian region offer considerable potential for economic and strategic development and cooperation in various sectors. Central Asia is also a key region in the current global geopolitical context, with access to other important and problematic regions like Afghanistan, the Caucasus, and the Caspian Sea region. At the same time, Central Asia faces several serious challenges in the political, social, economic, and security sectors, thus becoming an area of enormous opportunities, but also threats. For all interested parties, a presence in the region through engagement and cooperation with the Central Asian states will determine prospective global political balance and opportunities as well as the future of the Central Asian states themselves.

Central Asia is both historically and at present strongly connected and aligned with Russia, China and Turkey. However, the Central Asian states have in recent years increased efforts to distance themselves from their more oppressive neighbours, which in turn provides the EU with renewed prospects in building and strengthening ties with the region. At the same time, Central Asian countries can be characterised by protracted transitions, distinctive authoritarian regimes, and clan systems, which make cooperation with the West and democratic reform more difficult and riskier. Moreover, insecurity and instability in the region make the struggle for achieving dominance in the region crucial, yet more challenging for external powers.

The countries of Central Asia have extremely weak internal integration, based on complex problems stemming from the holdover institutional legacies of the USSR, numerous ongoing conflicts and other political, social, and cultural factors that divide their societies into groups with different interests and means for attaining their own goals. However, efforts towards internal cooperation, mainly initiated by Kazakhstan as one of the leading and more developed countries in the region, can be seen in attempts to establish Central Asian cooperation platforms such as the CA(E)U 2007-2024.

The lack of independent internal consolidation among the Central Asian states draws them, together with the wider region, into various alliances and initiatives

with strong political agendas from outside. Russian, Chinese, Turkey's and Western countries' involvement in these integration policies is often limited to humanitarian, human rights, and global society initiatives (such as the World Bank).

Notably:

- Russia/China through international treaties: CIS, CSTO, EAEU, SCO, BRI, OSCE, CICA, UN.
- Forums/organisational structures to the exclusion of Russia: OTS (Turkey), C5 (China).
- Ties with the West: C5+1 (US, Germany, EU), UN, OSCE.

Cooperation, integration, internal and external developments, and individual and group networking within Central Asia are some of the key points for strengthening the presence of the EU and its individual member states in this important geopolitical region.

Common features of Central Asian countries

The rise of authoritarianism and the decline of democracy in Central Asia

Since 2022, Central Asian governments have significantly strengthened the various degrees of their authoritarian rule, often by adopting laws restricting freedom of expression and civil initiatives, suppressing demonstrations, and reinforcing already widespread censorship. Previously an island of democracy and freedom of expression in the region, the government of Kyrgyzstan has taken several steps towards authoritarian rule in recent years. Although Western interest in Central Asia has also increased since the invasion of Ukraine by the RF, the current governments in the region still look to Russia as a model to consolidate their hold on power in their respective domestic spheres. For instance, following Russia's example, Kyrgyzstan and Kazakhstan have adopted the Foreign Agents Law, which obliges all non-profit and civic organisations receiving financial support from abroad to register as foreign agents; in Kazakhstan, activists and journalists who peacefully participated in mass demonstrations in January 2022 are still detained. In all Central Asian countries, numerous popular social media channels are banned, although many local users continue to use their services through VPNs. The banning of social media platforms has (in theory) secured the government's exclusive control over the state's information space, as what remains of independent media in Kyrgyzstan is now increasingly regulated and censored by Kyrgyzstan's government.

Corruption in Central Asia

Corruption is present and widespread in the political landscape of Central Asia, as it continues to be a persistent problem throughout the region. According to the Corruption Perceptions Index (CPI), corruption in all Central Asian states is much higher than the world average.

The fight against corruption is ostensibly an important issue for all Central Asian governments, but in reality, anti-corruption campaigns are primarily used to suppress the opposition. Widespread media censorship and government suppression of freedom of expression also contribute to the problem (Lee-Jones 2021).

Another prominent regional issue are infrastructure development projects, which see large movements of funds and are plagued by the opacity of government transactions. These infrastructure projects often involve the interests of Chinese companies and government, as well as those of the IMF. In addition to Chinese and IGO investment, all Central Asian countries have projects planned or underway in collaboration with the RF in developing both fossil fuel and renewable energy infrastructure (Mitrova 2024). Many of these projects are majority-owned by companies connected to RF oligarchs, and have been used to circumvent sanctions against the RF: e.g. control of the Gazil gas storage development worth \$850 million was transferred to an obscure offshore company owned by an Uzbek politician with business ties to RF tycoon Gennady Timchenko (Radio Free Europe 2024).

Human rights and related issues in Central Asia

In its Global Human Rights Report 2022/23, Amnesty International outlined the global decline of democracy, highlighting a growing trend of authoritarian practices and ideas, and increasing restrictions on fundamental freedoms around the world. Human Rights Watch categorised Central Asian governments as authoritarian, pointing to controls on freedom of expression and assembly, the detention of critics, and the failure to recognise and address widespread human rights abuses (e.g. torture and domestic violence).

None of the Central Asian countries are members of the International Criminal Court (ICC) and are therefore outside of its jurisdiction, which allows them to maintain relations with individuals and countries under international sanctions. The long-standing ties of the Central Asian states with the RF have a strong regional influence: although the Central Asian states have been independent since 1991, the political elites continue to follow the example of the RF to consolidate their position of power. Restrictions on human rights and freedom of expression have become prevalent in Kyrgyzstan as well, where in the years since President Sadyr Japarov's

ascension to power in 2020, the government has moved to impose controls on both state-owned and independent media outlets, as well as NGOs with foreign ties. In April 2024, Japarov signed a Foreign Agents Law law modelled on the RF legislation, which, among other things, obliges non-profit organisations to report to the government in detail regarding their activities (CPJ 2024). In addition, in 2021, Japarov enacted the controversial disinformation law, which allowed the government to shut down websites of news publications without a court order (CPJ 2021).

Across the region, authorities have increased their control over all public criticism and peaceful dissent. In 2023, Kazakhstan adopted a law on 'fake news', which provides legal tools to censor opposition, while other countries in the region are constantly amending existing media laws to adapt them to each regime's respective interests. The tactic of applying existing legislation has also been used. Following the example of the Foreign Agents Law of the RF, in Kazakhstan, the necessary amendments were made to the tax law to allow the state to keep a register of civil society organisations and individuals who receive support from abroad for information gathering, analysis, and dissemination activities. In 2023, the Kazakh authorities published a list of 240 natural and legal persons, including their personal data. The list included mainly organisations receiving financial support from the West, while individuals and organisations associated with the media of the Russian Federation were excluded (Transparency International 2023). Central Asian legislation now also more strictly regulates peaceful protests, obliging the cessation of street assemblies, demonstrations, marches, etc. In Kazakhstan, for example, activists and journalists who peacefully participated in mass protests in January 2022 are still being persecuted and detained.

Religious practice outside state-sanctioned organisations is prohibited and severely punished in several Central Asian states. For example, Uzbek student Sardor Rakhmankulov was sentenced to five years in prison in January for sharing an Islamic song on social media; in 2022, the crackdown on Islamists from the religious minority group in the Gorno-Badakhshan Autonomous Oblast escalated with measures such as destruction of religious symbols, closure of places of worship, and a ban on religious festivals.

The process of criminalising domestic violence has been slow in the region, but to date domestic violence has been criminalised in all Central Asian states, except for Turkmenistan and Tajikistan. In Kazakhstan, domestic violence was criminalised only recently, after the widely covered death of Saltanat Nukenova, who was beaten to death by her husband. Under the new provisions, Nukenova's husband, former Economy Minister Kuandyk Bishimbayev, was sentenced to 24 years of imprisonment. Despite legislative changes, human rights activists question how far

the impact will be felt in rural areas, where resources for the prevention of domestic violence are low.

In 2023, the Committee on the Elimination of Racial Discrimination (CERD) expressed deep concern about the situation in the Gorno-Badakhshan Autonomous Oblast in Tajikistan, in particular regarding the treatment of the Pamir minority. The use of force against demonstrators has been reported, followed by internet shutdowns and violent attacks. The Pamir minority has faced arbitrary detention, threats and harassment. CERD stressed that despite the adoption of the Law on Equality and Discrimination in Tajikistan, Pamirs continue to face discrimination. The legislation fails to protect the Pamiris on the grounds that the authorities deny their ethnic and linguistic identity. The government continues to try to assimilate the Pamiri population by suppressing their language and cultural expressions in various aspects of society.

In 2020, Human Rights Watch reported in relation to the COVID-19 pandemic that "the Turkmen government denies the existence of poverty in the country and has failed to provide assistance to economically vulnerable groups". Turkmenistan is a closed country, where it is particularly difficult to verify data provided by the state and to conduct reliable surveys. Turkmenistan is not included in the Global Gender Inequality Report and the UN notes that by 2020 only about a fifth of the indicators needed to assess the SDGs were available, with significant gaps in key areas including violence against women and the gender pay gap.

In Uzbekistan, same-sex consensual sexual activity between men is criminalised with imprisonment of up to three years, leading to the arbitrary detention, prosecution, and imprisonment of gay and bisexual men and transgender people by the authorities. LGBT people face constant discrimination and harassment from both state and non-state entities. For example, the Uzbek police have used forced anal examinations to prosecute homosexual men for consensual same-sex relationships, despite the World Health Organisation identifying such examinations as a form of violence and torture.

Security challenges in Central Asia

This chapter will provide an overview of security threats in Central Asia (e.g. domestic and outside terrorist groups), as well as examining Chinese and Russian military presences in the region. Central Asian states' cooperation with other outside actors such as the UN will also be discussed.

RF's military presence in Central Asia and cooperation with the Central Asian states

Russia's military presence in Central Asia and the threats associated with it play a

major role in determining power structures and strategic interests throughout the area. Richard E. Hoagland et al. (2021) noted that "the main security objective of the RF in Central Asia is to maintain Russia's dominant position in the Central Asian defence sector by maintaining Russia's military presence." The RF usually achieves these objectives under the auspices of the Collective Security Treaty Organization (CSTO). The Kremlin also takes into consideration security threats such as drug trafficking and Islamic extremism originating from its southern border, and the RF seeks to mitigate these threats through continued security cooperation and information sharing with Central Asian governments. Continued close security ties between Russia and Central Asia will also help to prevent a decline in Russia's influence in Central Asia in favour of China.

Kazakhstan

Kazakhstan, the largest country in the region, has always been a focus of interest for the RF, because the RF and Kazakhstan share a long border (7644 km). Military cooperation between the RF and Kazakhstan is quite close and has been so since Kazakhstan gained independence in 1991. However, there is a noticeable repositioning of Kazakhstan's interests towards China, with security cooperation with China being a growing trend. Kazakhstan aims to mitigate the RF's military presence in the region as well as its influence on the region's security policies (that is especially the case after 2022, when the RF attacked Ukraine). At the same time, Kazakhstan wishes to contain growing Chinese influence, to avoid becoming dependent on either of its biggest neighbours. Although Kazakhstan is a member of both the CSTO and the SCO, the CSTO retains the status of Kazakhstan's main defence institution.

Kazakhstan does not host any Russian military bases, however, it has several sites of military importance, such as the Sary Shagan ballistic missile test site and the Baikonur Cosmodrome, which they lease out to the RF. The RF, as the official successor to the Soviet Union, has retained control of this facility since 1991, and originally assumed this role through the post-Soviet Commonwealth of Independent States (CIS). In 2005, the RF ratified an agreement with Kazakhstan, allowing Russia to lease the space platform until 2050. It is jointly operated by Roskosmos and the Russian Air Force. However, on 7 March 2023, the Kazakh government seized control of the Baiterek launch complex, one of the launch sites of the Baikonur Cosmodrome. The main reason for the takeover was RF's failure to repay a \$29.7 million debt to the Kazakh government. However, it is also important to remember that the confiscation took place after the souring of RF's relations with Kazakhstan following Russia's full-scale invasion of Ukraine on 24 February 2022. Before 2022, the RF and Kazakhstan regularly conducted military exercises together under the CSTO. Kazakhstan is the second largest military contributor to the organisation after Russia, sending the most troops to collective military units

with Russia. As a member of the CSTO, Kazakhstan can purchase RF's armaments at the same prices as the RF military, share air cover, and form joint units with Russia.

Kyrgyzstan

The RF's Kant military airbase is located in Kyrgyzstan, about 20 km east of Bishkek. It is home to the 999th Air Base of the Russian Air Force. According to the agreement signed between the RF and Kyrgyzstan in 2003, the Kant airbase houses units of the RF's Air Force. The official opening of the airbase took place on 23 October 2003. In 2012, the Kant Air Base, the Naval Weapons Testing Base in Karakol, the Communications Centre in Chaldebar, and the Seismology Centre were merged into a single unit and designated as the Common Military Base of the RF. In December 2012, the Kyrgyz government agreed to lease the base to Russia for a period of 15 years (with an automatic extension option for another 5 years) after the Kremlin agreed to reduce Kyrgyzstan's debt by USD 500 million. As of 2023, the RF's troops at the airbase will be equipped with Su-25SM ground support aircraft, Mi-8MTV5-1 helicopters, Orlan-10 UAVs, military police and military traffic police units, and additional military air support functions.

Uzbekistan

Military cooperation between the RF and Uzbekistan is based on the Treaty of Friendship and Cooperation signed on 30 May 1992. Under the first President of Uzbekistan, Islam Karimov (1989-1991 General Secretary of the Communist Party; 1991-2016 President), Uzbekistan distanced itself from security relations with the RF. The new president (in power since 2016) Shavkat Mirziyoyev changed this policy in 2018, when the RF and Uzbekistan held the first joint military exercises since 2005. Since then, Uzbekistan has participated in bilateral and multilateral military exercises with the RF. In 2016, Uzbekistan and the RF signed an agreement allowing Uzbekistan to purchase Russian arms at the same price as the Russian military. In 2018, Uzbekistan signed a contract with the RF for 12 Mi-8 attack helicopters, armoured personnel carriers, as well as Su-30SM fighter aircraft. Since the revival of Russian-Uzbek defence relations under Mirziyoyev, the Kremlin has played a major role in re-supplying Uzbekistan with military equipment. Although Uzbekistan withdrew from the CSTO in 2012, it is considering returning to the organisation.

In the early 2000's, the RF started supplying Uzbekistan with small arms, sniper rifles, light machine guns, night vision equipment, ammunition, spare parts for armoured vehicles, etc. In contrast to previous experience, this involved domestic equipment production in, the Chkalov Aircraft Production Company in Tashkent, which had previously been central to the production of the modern Russian air transport aircraft IL-76 and its modifications, which form the backbone of modern Russian air transport aviation. At an early stage, the Chkalov plant carried out

maintenance work on IL-76 aircraft and assembled IL-78 tanker aircraft under a Russian-Indian contract. UzRosAvia was a Russian-Uzbek joint venture established under intergovernmental agreements signed in 2007 in Tashkent. The joint venture's facilities are located in a machine and repair workshop in Chirchik, Tashkent region, and the UzRosAvia is equipped to maintain Mi-type attack helicopters. In 2017, Uzbekistan and the RF signed an agreement on advancing military and technical cooperation, which provided mutual supply of military equipment, maintenance of weapons and systems, military and technical assistance, research and development.

Tajikistan

After the collapse of the USSR, the RF took over the defence of the Tajik-Afghan border. Russia handed over to the Tajik authorities 13 military camps, 64 border posts and command posts, as well as weapons and military equipment. In 2004, a Russian land military base was established in Tajikistan (based on the 201st Motorised Infantry Division Gachina). The base has about 7,000 troops, the largest military contingent of the RF abroad. In 2014, a joint programme for modernisation of the Tajik armed forces was signed, under which Russia provided Tajikistan with military-technical services worth approximately USD 1.23 billion. As of 2015, the Russian army has been engaged in training the Tajik military: every year, approximately 500 Tajik soldiers are trained on Russian territory. On 12.08.2021, during the events in neighbouring Afghanistan (the return of the Taliban to power), Moscow allocated USD 1.1 million for the construction of a border post in the Khatlon region, and subsequently organised military exercises. The same year (2021), the RF and Tajikistan ratified an agreement on the establishment of a unified regional air defence system which has become integral to the CIS's common air defence system. From the 3rd to the 7th of April 2023, joint RF-Tajikistan military exercises took place in the Khatlon region of Tajikistan (at the Kharb-Maydon mountainous desert training area near the border with Afghanistan). On 22 November 2023, as a part of establishing a common air defence system for the CSTO countries, Russia handed over two divisions of the S-300 system to Tajikistan.

Environmental challenges in Central Asia

For the countries of Central Asia, climate change is now a fact of daily life with real consequences. Central Asia is more vulnerable to climate change than Western countries due to its poor socio-economic situation (DARA Climate Vulnerable Forum 2010), however, the situation is further complicated by the obsolescence of existing infrastructure, changes in the water regime, and the economic dependence of Uzbekistan, Kazakhstan and Turkmenistan on the production and use of fossil fuels.

The challenges posed by climate change are already having a real impact on domestic and foreign policies. For example, Uzbekistan, which used to be a net

exporter of natural gas itself, was forced to buy Russian natural gas to survive several years of very cold and long winters (Putz 2024). Due to rising domestic fuel consumption during colder months and increasing global fuel prices, Kazakhstan has stopped subsidising domestic fuel sales to reduce growing state budget deficit. (Al Jazeera 2022). In Tajikistan, food security is becoming a major problem as overgrazing, over-cultivation, inefficient land and water use, and long periods of drought and severe storms caused by climate change have led to increased erosion, landslides, floods, and desertification. Melting glaciers in Tajikistan (which has the world's largest glaciers outside the polar regions) are also affecting water levels in rivers. Now, flooding due to the abundance of meltwater is the main concern, but in the longer term, Central Asian countries (especially Uzbekistan and Kazakhstan) would face water scarcity instead. In addition, health problems caused by air pollution from coal mining and burning are a major concern in Kazakhstan and Kyrgyzstan.

Players in Central Asia

Central Asia, networks, dispositions, perspectives

The main players in the region (the US, China, Turkey, RF, and the EU) have both common and state-specific objectives in Central Asia. Common objectives include security, economic interests, and the balancing of powers on the geopolitical map. In maintaining their presence and influence in the region, the main actors also import their own values to Central Asia, some of which can be very different – imperialism, communism, democracy, liberal ideologies, ideals of civil and religious society, different economic models and, of course, practical interests.

All the main actors use a multilateral approach for maintaining influence in Central Asia, with common and distinctive features based on historical, geographical, and social values or ethical backgrounds. Partnerships and extensive multilateral networks, investments, military presence, and the development of media/information ecosystems are the most common areas and forms of influence. To understand the power dynamics within the region, trends in relations between the main external actors as well as their attitudes towards local issues in Central Asia should also be examined. Considering existing differences in perceptions, interests, and values, the East and the West often clash with one-another in the region, however, as no state has achieved hegemonic status within Central Asia, a certain tolerance and willingness to negotiate is necessary for maintaining a presence in the region.

The external powers hold differing attitudes towards the Central Asian states themselves. Western countries are looking for a strong regional partner to cooperate with and invest in (in this sense, Kazakhstan and Uzbekistan are the leaders among

the Central Asian countries), and in addition to official cooperation, Western countries and various international organisations make general donations of aid to the region. China's strategy mainly centres around investing into infrastructure projects in the smaller countries in the region, thus ensuring greater degrees of dependency of these states on China. The RF seeks to keep all Central Asian states under control, without allowing any one entity to grow in power and influence. While the RF and China have little interest in national agendas in the region, Turkey is actively building its presence as a collector and defender of the Turkish and Islamic world (Organisation of Turkic States (OTS)).

Interests and activities of the People's Republic of China in the region

China's interests in Central Asia have a long history, dating back to the beginnings of the Chinese Empire. The famous Silk Road from China to Europe passed through Central Asia, which for centuries was the most important trading centre between Europe and Asia. Recent developments show China's growing influence both globally and on regional levels around the world. Central Asia is one of the strategic regions where Beijing is seeking to expand and increase its influence not only on the local politics, economy, and culture, but now also in the defence and military sectors.

After the collapse of the Soviet Union, Central Asia became a new important market for China. Central Asia's geographical proximity to China (which shares a border with Kazakhstan, Kyrgyzstan and Tajikistan) makes the region a priority interest for China. Accordingly, Chinese influence in the region has grown significantly, making China the most important economic partner for Central Asian economies. Chinese investments into the region have also become a significant source of foreign direct investment with many local projects relying on Chinese capital. Although Chinese investments help create jobs, construct new factories, schools, etc., they also increase local authorities' reliance on China. The People's Republic of China is already putting pressure on Central Asian politicians, for instance, insisting on Central Asian states to recognise Taiwan as part of the People's Republic of China, not as an independent state. In addition, for China, Central Asia is a kind of buffer zone between unstable Afghanistan and the Xinjiang Uyghur Autonomous Region, and seeks to cultivate the Central Asian states as partners in combating religious extremism and suppressing Muslim minorities in Xinjiang.

The Central Asian states are also part of the Shanghai Cooperation Organisation. One of China's primary objectives in the region is to curb RF's influence in the region. As a platform for exporting Chinese influence through funding infrastructure projects, the Belt and Road Initiative (BRI) has a major impact in Central Asia. The BRI includes the Silk Road Economic Belt - an intercontinental passage linking China

to Southeast Asia, South Asia, Central Asia, the West and Europe by land; it also envisages a 21st century Maritime Silk Road linking China's coastal regions to Southeast and South Asia, the South Pacific, the Middle East, East Africa and Europe. The official aim of this initiative is improving regional integration, intensifying trade and stimulating economic growth, and promoting transnational security, which in addition to economic hegemony, would also legitimise China's military presence in various parts of the BRI for 'security-related reasons'.

Over the past 10 years, China has strengthened new diplomatic, economic, security and military ties in Central Asia and gained access to abundant natural resources. China's choice is strategically motivated and largely concerns economically weaker and more unstable states (e.g. Tajikistan, Turkmenistan and Afghanistan). With the aim of protecting its economic interests and ambitions (including the BRI and the China-Pakistan Economic Corridor (CPEC)), China has set up military bases in Tajikistan and, after the withdrawal of US troops, in Afghanistan as well, for the reason of securing a certain stability in the region. The Chinese Foreign Minister, Wang Yi, also met with the Taliban Foreign Minister in Kabul in 2022.

Subsequently, Chinese companies have begun investing in Afghanistan. In 2023, several multi-million-dollar investment agreements were signed between China and Afghanistan, becoming the first significant foreign investment since the Taliban took power in 2021. At the 5th China-Afghanistan-Pakistan Foreign Ministers' Meeting in Islamabad in 2023, the Foreign Ministers of Pakistan, China and Afghanistan emphasised the importance of trilateral cooperation for achieving a "stable, prosperous and peaceful Afghanistan that serves the interests of the entire region." They reiterated their commitment to the expansion of CPEC to include Afghanistan and stressed the importance of existing regional connectivity projects such as CASA-1000, the Turkmenistan-Afghanistan-Pakistan-India gas pipeline and the Afghanistan Transit Railway for regional connectivity. In the light of these developments, Russia's prospects in the region do not seem as optimistic as the Kremlin would like.

China is also interested in Central Asia because of its abundance of natural resources like natural gas and oil. In addition, as in the era of the Silk Road, Central Asia is an important hub between China and Europe. It is likely that China's influence in the region will continue to grow, and China will seek to further integrate the countries of Central Asia and make their economies more dependent on China, at the same time undermining RF's position of regional power. While China has previously ensured its security interests through the Shanghai Cooperation Organisation and relied heavily on the RF's military presence, the strategy has now changed.

It is no coincidence that Chinese money has been used to set up a base in Tajikistan, close to the China-Afghanistan border, which officially belongs to the Tajik army, but is, in fact, a subject to Chinese interests. The governments of China and Tajikistan signed an agreement to build several border guard posts and a training centre on the Afghan border. Chinese armed militia units are also positioned in the region. Although China's main interests in Afghanistan concern the prevention of possible spread of terrorism into Chinese territory, it is likely for China to establish military bases there to establish itself militarily in the region. It is important to remember that at the same time, RF troops are stationed in Tajikistan.

Since 2002, China has been organising joint military exercises in Central Asia, some of which have taken place based on bilateral agreements, others within the framework of the Shanghai Cooperation Organisation. In addition, China provides military assistance to Central Asian countries. Although no official details are available, public sources indicate substantial expenditure: for example, Kyrgyzstan received USD 16 million in 2014 for modernisation of weaponry, and a further USD 14 million in 2017. Kazakhstan has also received around 5 million USD as well as military equipment. Tajikistan has received the most aid from China. In addition, China is one of the world's largest arms exporters and sells arms to Central Asian countries such as Uzbekistan, Kazakhstan and Tajikistan.

The Central Asian countries' dependence on China is increasing and is a continuous process. From the Chinese side, the share of imports is around 0.8% and exports 0.9%, while for Central Asian states the proportions are much higher, with exports reaching up to 22% of GDP and imports even higher. In addition, China's export of soft power (promotion and dissemination of Chinese language, culture, values, etc.) to Central Asia also plays an important role in securing Chinese interests in the region. The number of Chinese workers in the region has also increased.

Russian interests and activities in the region

Russia has long-standing historical-cultural and economic-political ties and interests in Central Asia but remains a secondary but still important player compared to China. Of the three regional centres of power, the RF has by far the best infrastructure and networks in Central Asia, with Moscow having political, economic, military, information channels of influence in the region. Some of these are more visible and have official status, such as the CIS, the Collective Security Treaty Organisation, the Eurasian Economic Union.

Oil, gas, and water pipelines and energy systems, industry and technology support are other dependency mechanisms linking Central Asia to Russia. However, the slow development of local industry and the infrastructure and technology underlying industrial growth are mostly inherited from the USSR. Much of this infrastructure

has now surpassed its intended lifetime, and the Russian industrial foothold in the region is set to decline. Some crucial instruments of the RF's influence are nevertheless much more subtle: ties of the ruling class to the Kremlin have carefully been cultivated by past and present regimes. In this context, authoritarian tendencies in Central Asian states result from historical conditions and political developments. Until recently, this strategy has been quite successful, but in recent years, the Central Asian states have started to work towards reducing their reliance on the RF, for example, in 2022, Kazakhstan refused the RF's request for military aid in support of the Kremlin's invasion of Ukraine. In general, after RF's military invasion of Ukraine on the 24th of February 2022, Central Asian states (especially the economically stronger ones) have been aiming to distance themselves from Russia.

However, this process is quite slow and difficult, as the old ties to the RF are still in place and recent factors continue to influence the internal politics of the Central Asian states. This includes the intensification of trade between Russia and Central Asia, EU sanctions and bans on goods from Central Asia and Turkey, intensive migration from Russia to Central Asia, and the growing demand for migrant workers in Russia despite the increase in racism, xenophobia, and persecution towards Central Asian migrants after the terrorist attack at the Krasnogorsk Crocus City Hall in the Moscow Region in March 2024.

Even though historical, cultural, political and other ties with the West still play an important role in the Central Asian region, they are significantly weaker in comparison to Chinese and Russian influence. Given Russia's economic and technological challenges, the Kremlin attaches great importance to its military presence, e.g. the 201st Russian military base in Tajikistan, which officially hosts at least 7,000 Russian troops. In addition, the RF regards Central Asia as a crucial security buffer zone offering protection from unstable Afghanistan and Pakistan (including the threat of Islamist terrorism in the form of ISIS-K and others), but also from the growing influence of China.

The Kremlin has recently made notable efforts to maintain its influence in Central Asia. The most favourable scenario for the RF would be to turn the Central Asian countries into satellite states and reduce the influence of other major players (China, US, EU) in the region. Although the RF is competing with China for influence in Central Asia, its historical, cultural, political and economic ties to the region remain strong. In addition to the Soviet and even Russian Empire's historic, cultural and economic heritage, Russian language still maintains its position as lingua franca in Kazakhstan, Kyrgyzstan and Tajikistan. As much as Russia is still an important economic partner for the Central Asian states, they are also vital trading partners for Moscow with trade turnover between the RF and Central Asia being USD 25.8 billion in 2018. The struggle for dominance in the Central Asian region between

China and the RF is largely based on the overall strategic functions that Russia and China have established within the region.

The RF has established itself as the main guarantor of security of Central Asia's borders and as a formidable military power, while China has gained influence through major investments into transit and energy infrastructure as well as exporting soft power.

Turkish interests and activities in the region

Turkey has historically had strong cultural and linguistic ties with all Central Asian countries except Tajikistan. Due to the Iron Curtain, Turkey's relations with and political and economic influence in Central Asia was minimal, if not non-existent up to the fall of the Soviet Union in 1991 after which Turkey became the first country to recognize the independence of the new republics and establish diplomatic relations. This swift response was driven by a desire to support these new states in securing their place on the international stage, as well as by an effort to help them move out of Russia's direct sphere of influence and advance Turkey's own interests in the region. To this end, numerous cooperation agreements were signed in areas such as education, culture, economy, trade, transport, and politics. Although Turkey initially viewed the region as a single entity, over time, it became evident that these countries are quite distinct from each other, leading to a more state-based approach in developing bilateral cooperation.

Turkey's main interests in the region include political stability, combating Islamic terrorism, trade and investment, transport and logistics, as well as accessing the region's rich natural resources, particularly oil and natural gas. Turkey has been striving to diversify its energy sources, and Central Asia has emerged as one of the alternatives. Initially, Turkey approached the region from the perspective of an elder brother, but as this approach proved ineffective over time, Turkey has sought to move away from this image and instead develop bilateral strategic partnerships with each country in various fields. Central Asian countries have also shown interest in Turkey's defence industry, particularly drone production. In 2022, Turkey signed a cooperation agreement with Kazakhstan for drone manufacturing.

The primary organization promoting unity among Turkic-speaking nations and facilitating multilateral cooperation is the Organization of Turkic States (OTS), founded in 2009. The organization includes Azerbaijan, Kazakhstan, Kyrgyzstan, Turkey, and Uzbekistan as full members, while Turkmenistan, Hungary, and the Turkish Republic of Northern Cyprus participate as observer states. In 2021, the Turkic World Vision 2040 was adopted to enhance cooperation in economy, energy, technology, digitalization, sustainable agriculture, culture, and religion. Another important organization fostering cultural collaboration is the International Organization of Turkic Culture (TURKSOY), established in 1993. TURKSOY's vision is

to promote fraternity and solidarity among Turkic peoples, pass on Turkic cultural heritage to new generations, and introduce it to the world. The organization has initiated the Cultural Capital of the Turkic World designation (since 2012) and the Turkvision Song Contest (since 2013).

Straight after the collapse of the Soviet Union, Turkey established the Turkish Cooperation and Coordination Agency (TİKA) to provide developmental assistance to Central Asian countries. Through TİKA, numerous projects have been implemented in education, healthcare, restoration, agriculture, finance, tourism, and industrial development. TİKA presents itself as the representative of the Turkish model of development cooperation, emphasizing sincerity and transparency. Additionally, Turkey provides various scholarships for studying in Turkey. Until 2016, the network of private schools associated with the Gülen movement represented Turkey's educational soft power in Central Asia. Since then, Turkey has undertaken diplomatic efforts worldwide, including in Central Asia, to transfer these schools to the Maarif Foundation, established in 2016. Religious cooperation is fostered both through OTS and the Presidency of Religious Affairs (Diyanet). Diyanet aims to provide religious services not only to the Turkish diaspora in various countries but also to fraternal nations. Each Turkish embassy in Turkic-speaking Central Asian countries has a Diyanet representative.

Turkey's trade with Central Asia has been gradually increasing over the years. In 2022, exports to Central Asia accounted for 8.31% of Turkey's total exports, while imports from the region made up 7.06% of total imports. In 2019, these figures stood at 6.53% and 6.34%, respectively. The trade volume between Turkey and Central Asian countries has also shown a growing trend. In 2019, Turkey's trade volume with the region was approximately \$8.5 billion, rising to around \$13.2 billion in 2022. As of 2019, about 4,000 Turkish companies were operating in Central Asia.

US interests and activities in the region

Washington is interested in good relations with the countries of Central Asia, their stability and their independence from China and Russia, as China, the RF together with Iran undermine US interests in the region. The US government has invested heavily in Central Asia's economy, democracy promotion initiatives, and security, totalling some \$9 billion. The US private sector has invested \$31 billion in the region. In addition to economic cooperation, the US aims to curb the influence of China, the RF, as well as Iran. Turkmenistan, Uzbekistan and Tajikistan share a border with Afghanistan, making drug trafficking and terrorism also a problem affecting all the Central Asian countries. Moreover, the RF's recent activities in the region have become a concern for Washington. As a result of these factors and developments, the US has started to pay close attention to Central Asia, as illustrated by the following statement in the US Strategy for Central Asia 2019-2025: "Central Asia is

a geostrategic region that is important to the national security interests of the United States, regardless of the level of US involvement in Afghanistan" (United States Strategy for Central Asia 2019-2025).

Additionally, the document underlines that the Central Asian region has always been a strategic and commercial crossroads between Europe and Asia, for this reason, the US "has a key strategic interest in the region to create a more stable and prosperous Central Asia, free to pursue its political, economic and security interests with a wide range of partners on its own terms; connected to global markets and open to international investment; with strong, democratic institutions, the rule of law and respect for human rights. A stable and secure Central Asia contributes directly to US efforts to combat terrorism, support regional stability, promote energy security, and increase economic prosperity in the region and beyond" (United States Strategy for Central Asia 2019-2025).

Interests of the European Union

Since the full-scale invasion of Ukraine by the RF, the EU has become more interested in developing trade and transport routes outside the territory of the RF. One such alternative is the Central Corridor (or TITR), which would facilitate transit from China through Central Asia to Europe. In addition to trade, the Central Corridor would provide the EU with access to Central Asian energy resources, such as natural gas, but also a suitable geographic location for the development of hydro-, solar and wind energy (Rizzi 2024).

Recently, the EU has also shown interest in importing natural gas from Turkmenistan and in 2023, Turkmenistan signed its first energy agreement with the EU. This agreement has revived interest in the construction of a trans-Caspian gas pipeline to export Turkmen gas to Europe to diversify the EU's energy supply and reduce dependence on Russian energy exports. (Nelson 2023).

The EU's interest lies not only in expanding economic ties but also in spreading Western values and the rule of law in the region. This would help to create an economic and political environment conducive to investment by Western countries and companies in East Asia and would ensure further reduction of the RF's influence in former USSR states. Cooperation with the EU is also beneficial for the countries of Central Asia themselves, as it would attract European investment, expertise and innovation in strategically important sectors. At present, one of the most significant obstacles to attracting Western investment to the region is its unstable economic situation and opaque governance. The main concerns of European companies relate to corruption and the Central Asian states' abilities in ensuring legal protection of European assets and investments.

Energy and mineral resources in Central Asia

Kazakhstan

Main energy sources	Coal 50%, oil 25%, natural gas 24%
Primary energy exports	Oil (75% of total production), coal (30% of total production)
Primary energy imports	Natural gas (from Russia)
Mineral resources, export	Oil, natural gas, coal, uranium, gold
Trade partners	China, Italy, Russia

Uzbekistan

Main energy sources	Natural gas 86%, oil 8%, coal 5%
Primary energy exports	Natural gas (6% of total production)
Primary energy imports	Natural gas (from Russia and Turkmenistan)
Mineral resources, export	Gold, copper, uranium, minerals, natural gas, oil
Trade partners	China (US\$ 6 billion), Russia, Kazakhstan, Turkey

Turkmenistan

Main energy sources	Natural gas 75%, oil 25%
Primary energy exports	Natural gas (70% of total production)
Primary energy imports	Not known
Mineral resources, export	Natural gas, oil, cotton, textiles and carpets
Trade partners	China (83% of total Turkmen exports), Uzbekistan, EU and Turkey (imports)

Tajikistan

Main energy sources	Hydropower 40%, oil 30%, coal 25%, natural gas 5%
Primary energy exports	Coal, hydropower (seasonal)
Primary energy imports	Oil, coal, natural gas
Mineral resources, export	Gold, dissimilar metals, hydropower potential
Trade partners	Imports from China and Russia, exports to Kazakhstan, Switzerland and China

Kyrgyzstan

Main energy sources	Hydropower 28%, oil 36%, coal 27%, natural gas 8%
Primary energy exports	Coal, oil, hydropower (seasonal)
Primary energy imports	Not known
Mineral resources, export	Hydropower, gold, etc. precious metals, oil, textiles
Trade partners	Russia (43% of total exports), China (64% of total imports), Kazakhstan, Uzbekistan, Turkey

Energy security

As electricity and fuels are a strategic resource crucial for the functioning of any state and economy, achieving energy independence is essential for the security of Central Asian countries. For Central Asian states, advancing energy security would predominantly consist of upgrading and expanding the electricity grid; building a new, more efficient generation network; diversifying energy sources; developing the renewable energy sector; but also reducing dependence on outside resources. However, as energy infrastructure projects are often large-scale and very costly, Central Asian countries often need to involve foreign investment and companies. Western firms, however, are reluctant to make large investments in Central Asia due to the risks and the uncertainties surrounding economic and private ownership. Moreover, Western companies are generally uninterested in projects relating to fossil fuels, therefore, Western investment in Central Asia is mostly associated with renewable energy projects, which are ill-equipped to reduce the energy shortages currently afflicting the region. Central Asian countries have thus developed close ties with the US and China, which, by investing in natural gas and coal mining, offer quick solutions to the region's pressing energy problems (Mitrova 2024) (Avdalini 2024).

However, the majority of energy companies in the region are majority-owned by the RF and China, which threatens the independence of the Central Asian countries. For instance, in 2023, Tajikistan's state energy company Barki Tojik owed 22.77 billion Rubles to the second largest hydroelectric power plant in Tajikistan, Sangtuda HPP-1, which is majority-owned by the RF, prompting Tajikistan's energy minister to meet with RF Deputy Prime Minister Alexander Novak in October 2023 (Interfax 2023). The risk of being linked to Russian tycoons and the use of off-shore companies is in fact known to the countries of the region (e.g. as revealed in a secret report commissioned by the Uzbek government on the Gazil natural gas field - (Radio Free Europe 2024) but corruption and the lack of alternative solutions make it difficult for Central Asian countries to make major changes in this regard.

EU and Estonian interests and opportunities in the region

The changing geopolitical situation has provided opportunities for the region to invest in energy infrastructure for facilitating transition to green energy, but the growing involvement of China and the RF increases dependence on external resources and expertise and could therefore undermine the countries' de facto capacity for self-governance. In addition to mitigating the current crisis through

'quick fixes' such as greater use of coal, Central Asian countries need to work on creating a fair and credible economic landscape and transparent governance systems to reduce the current high level of corruption. The US and the EU have already cooperated with various Central Asian countries on energy development programmes, but most Western investments and actions concern future developments without addressing the very real and pressing problems the region is facing today. The RF and China, on the other hand, offer quicker and simpler solutions, with China in particular investing in coal mining in the region.

Cooperation on adaptation to climate change and the transition to renewable energy is certainly one of the most promising prospects for furthering relations between Central Asia and the European Union, as the Central Asian countries themselves are keen to invest in renewables. The EU has an opportunity to offer not only expertise in energy infrastructure and newer, more efficient technologies, but also in fighting corruption and creating transparent government systems and introducing e-governance principles.

Estonia could use its experience of successful transition from the USSR and integration with the EU to provide insights on possible solutions to fight corruption and address other legacies of the Soviet times. A highly qualified workforce and academic research should also be involved in designing and proposing energy policies and solutions, as science-based approaches have proven to be more robust and useful to the wider public.

The countries of Central Asia are increasingly showing interest in improving and strengthening their relations with Western countries to broaden their policy options and find new trade partners. The influence of the RF in the region has declined both economically and politically, and since the RF's invasion of Ukraine, the Central Asian countries have deliberately moved towards diversifying political relations to avoid Western sanctions on the one hand, and to maintain friendly relations with the RF on the other.

The current increase in interest concerning cooperation in the region is a valuable opportunity for the West to establish a high-level diplomatic cooperation with the Central Asian countries to help eliminate human rights abuses and reduce the influence of the RF in the region. Cooperation in the field of education can provide some of the most efficient tools for democratisation and the building of a strong civil society. At present, China (Confucius Institutes) and the RF (Russian-language schools throughout the region) far surpass any Western presence in the Central Asian educational scene. For example, the only place in Tajikistan where mineral mining can currently be studied is in the city of Buston in the region of Shughd, where one of the branches of the Chinese Confucius Institute is located. RF

considers the spread of Russian schools in the region to be a key strategy in establishing Russian hegemony in the so-called near abroad and is also a response to the spread of Western soft power in the region (Special Eurasia 2023). The development of educational cooperation contributes to the promotion of Western values by the initiative of the region's own people, rather than because of influence and prescriptions from above, e.g. from the EU or the US. (Mullodjanov 2019).

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