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Russia's and China's Influence in Central Asia:  
New shifts in national and foreign policies in  
Central Asian countries and neighbourhood

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# Executive Summary

This report answers the questions entailed below. Our findings are briefly summarized here, and are expanded upon at the beginning of each section, and are covered in more detail in each subsection. In sum, we conclude that the EU and Estonia are at a critical juncture in its relations with Central Asia. The EU can accomplish its goals of curtailing the threat posed by Russia to both Europe and Central Asia, but will likely need to commit to significant strategic goals which demand sizable economic and political investments in an uncertain environment.

## **1. Domestic political trajectories and international outcomes: How have changes in Central Asian domestic politics shaped intra- and external regional relations in the last decade?**

- Although the second half of the 2010's seemed to promise a more optimistic outlook for future developments in the region, the 2020's have so far seen stagnation or even a reversal of democratic reform and strengthening of authoritarian tendencies.
- At the same time, intra-regional cooperation and ties have improved, making working with the five Central Asian states as a whole an easier affair.
- While the EU should continue to engage and cooperate with the Central Asian states, increasing authoritarianism as well as cooperation with Russia and China make for a difficult environment.

## **2. Changes in regional energy markets: How have Central Asia's roles as energy importer and exporter been changing in the context of geopolitics?**

- Since Russia's 2022 full-scale invasion of Ukraine, Central Asian gas (coming mostly from Turkmenistan) has been hastily looking for new external partners.
- Simultaneously, Central Asian states are now more interested in developing domestic nuclear energy capabilities.
- In both cases, the EU has a role to play, but needs to commit to large and risky infrastructure projects to become as relevant as Russia or China in the region.

## **3. Multi-vectoral foreign policies in Central Asia: What are the new possibilities for EU partnerships? How do Russian partnerships with the region's countries impact future EU-Central Asia relations?**

- There is a strong mutual interest between the EU and Central Asian states for cooperation in a number of areas, and trade between the two regions has increased significantly. However, a number of pitfalls remain (notably parallel imports headed to Russia).
- Although diplomatic ties between the EU (and individual EU member states) and Central Asia have seen progress in recent years, Russian interests continue to have the most significant impact on the region's domestic and international policies. The EU needs to make a convincing argument to the Central Asian states to limit their

ties with Russia, while simultaneously the EU needs to foster alternative options for the Central Asian states.

- Estonia can play a key role in a number of niche policy sections, either through EU initiatives or its own bilateral initiatives.
- The Middle Corridor has the potential to increase EU-Asia trade while circumventing Russia, but remains underdeveloped and contingent on a number of factors, chief of which is expanding infrastructure.

Given the host of autocratic players in the region, it should be stated that well organised and effective cooperation between democratic countries is crucial for constraining the global rise of authoritarianism. That said, uninformed engagement with authoritarian regimes can have deleterious effects.

Some risks include:

1. strengthening existing power structures and lending legitimacy to the regime,
2. sending mixed messages about the EU's commitment to democracy,
3. failing to recognise an authoritarian regime's use of democratic language and supposedly democratic reforms without any meaningful actions and change,
4. misuse of investor funds and other resources due to corruption. (Cheeseman & Desrosiers, 2023).

Moreover, it is crucial to formulate an effective strategy for evaluating the impact of planned actions to avoid concentrating on easy-to-measure goals, leaving the underlying power structures unaddressed and prioritising outcomes even if they are the result of problematic processes.

Some key strategies for risk mitigation:

1. ensuring objectives are commensurate with the capacity to act, determining the available opportunities accordingly,
2. risk analysis together with concrete strategies of addressing these risks,
3. shared understanding of goals and expected results, ensuring each action in a project is congruent with these,
4. clear understanding of who is responsible for what.

# 1. Domestic political trajectories and international outcomes

**Domestic political trajectories and international outcomes: How have changes in Central Asian domestic politics shaped intra- and external regional relations in the last decade?**

## About this section:

This section focuses on the transformations of domestic policy and the ensuing consequences for foreign policy in the five former Soviet Central Asian states. Despite common regional trends, each country demonstrates a unique trajectory of political development, which indicates the need for an individual approach to choosing the analysis time frame.

Each country's analysis focuses on the primary political shocks, and significant changes that have emerged in the past decade (the exception being Tajikistan, whose civil war in the 1990s remains the pivotal, post-independence political event defining the current state of affairs) and how these events shape the current political and economic status quo of each country.

## Key findings:

In the last decade, Central Asian governments have seen a number of new leaders emerge. Examining the cases of Uzbekistan, Kazakhstan, Kyrgyzstan, and Turkmenistan (who have seen turnover in the head of state), and Tajikistan (where the head of state has remained the same), we find two broad trends:

1. increasingly entrenched authoritarianism in the guise of reforms;
2. increasing inter- and intra-regional cooperation.

With Russia's proportionally reduced attention to the region since 2022, the five Central Asian countries have sought to solve common problems directly. Consultative summits (often with simultaneous participation of all five presidents) have become more frequent and productive: at the June 2024 6th Central Asia Heads-of-State Consultative Meeting, leaders endorsed a roadmap to 2027 and even a "Central Asia-2040" strategy (Dgap, 2024). Trade among the five states has increased by around 80% from 2018 to 2024.

Although the shift towards increasing authoritarianism has led to a decline in civil liberties, the independent press, and true opposition in the domestic sphere, **economic and political engagement across Central Asian states and with external actors has become more fluid compared to prior decades.** In addition, developments with the heads of three of the five states (Uzbekistan, Tajikistan, and Turkmenistan) indicate that the ruling families of each state are becoming increasingly entrenched and are establishing ruling dynasties for the coming years. **Our prognosis is that future engagement with all five states will mean negotiating with fewer decision makers concentrated at the top of a narrow, autocratic political hierarchy.**

## 1.1. Uzbekistan's reforms growing stale: Shavkat Mirziyoyev's promise of prosperity and development 8 years later

Having served as former President of Uzbekistan Islam Karimov's prime minister for 13 years before becoming President after Karimov's death in 2016, Shavkat Mirziyoyev was well ingrained in the establishment of his predecessor. Nonetheless, Mirziyoyev's administration has moved past its Karimovite roots with the first two years of his presidency featuring a significant number of government personnel replaced in order to secure his rule (Pannier, 2018). During this time, Mirziyoyev reached a political consensus with economic elites in Uzbekistan (including powerful members of the criminal underworld) to ensure near universal loyalty to his administration.

Mirziyoyev's rule has been hailed as a significant change (The Economist, 2019). Economic liberalization, improved human rights, acknowledgement of (some of) the Karimov regime's transgressions, and the emergence of independent media spaces has resulted in tangible domestic changes for the majority of Uzbekistan's population. Uzbekistan's GDP has consistently grown under Mirziyoyev with the diminishment of forced labour, increase in external trade and successful curation of increased FDI (Bartlett, 2021). However, the continuation of state-owned enterprises as well as local elite monopolization of different economic sections, set limits for how liberal Mirziyoyev's economy is and will be (Umarova, 2023). These reforms have also contributed to Mirziyoyev's distancing from Karimov's administration by stylizing himself as both a reformer and a man of the people (Pannier, 2018). Mirziyoyev's initial attacks on government institutions and officials immediately after Karimov's death sought to appeal to popular discontent with the post-independence woes of the country (Pannier, 2021).

Despite Mirziyoyev's early progress in human rights and economic liberalization, his domestic reforms have become cloudier since 2021. His constitutional reform, which sparked protests and a bloody clampdown in the autonomous republic of Karakalpakstan in 2022 (in response to removing the region's right to secede, which survived in the new constitution) and when eventually passed, extended the possibility of his continued rule until 2037, dispel any illusions that the pattern of authoritarian repression in Uzbekistan will end in the near future (Benson, 2023). The initial liberalization of the media in the first days of Mirziyoyev's presidency has come to a standstill. Likewise, other areas of human rights which have had initial success, have stagnated in recent years (Terzyan, 2025).

The suppression of the Karakalpakstan protests represents a contradiction in Mirziyoyev's legitimacy: as he pursues reforms, Mirziyoyev simultaneously gives space for grassroots opposition to grow and oppose his consolidation of power (Sattarov, 2023). While Mirziyoyev looks stable for the foreseeable future, the reformer's ideology may prove to be troublesome, if not dangerous, as the population becomes dissatisfied with Mirziyoyev's inability to make good on his promises for a new, better, Uzbekistan.

Within the elites of Mirziyoyev's Uzbekistan, there remains competition which sometimes spills into the public eye. In the Fall of 2024, an assassination attempt on a top administration official, stemming from alleged economic rivalries, led to a significant overhaul of top security officials (Eurasianet 2024a). Large shifts in the economy, big infrastructure projects, and dwindling reserves could either pay off, or cause huge economic

headaches and subsequent turmoil for Mirziyoyev in the coming decades (Eurasianet, 2024b).

In terms of foreign policy, Mirziyoyev has significantly departed from Karimov (Toktogulov, 2021). While still maintaining neutrality by not committing Uzbekistan to military or economic blocs, Mirziyoyev has opened Uzbekistan's economy to the world with notable increases in foreign direct investment and tourist inflows. During his tenure, Mirziyoyev has notably improved relations with other Central Asian republics, by introducing visa-free regimes, ending border disputes, and liberalizing trade. The transition from Karimov to Mirziyoyev has been credited with enabling a much greater degree of regional cooperation than prior to 2016 (Pannier, 2021).

Since 2016, Uzbekistan has improved its relations with external players as well (increased trade with Russia, China, better diplomatic ties with the US and Turkey), which confirms that Mirziyoyev remains in good standing on the international stage. Mirziyoyev, like other Central Asian leaders, has opportunistically approached the 2022 full-scale invasion of Ukraine. While Uzbekistan has no interest in ideologically supporting the conflict, it continues to do business with Russia (e.g. increasing energy ties) while diversifying trade (e.g. opening routes to circumnavigate Russia) (AP, 2024; Eurasianet, 2025a).

In sum, Mirziyoyev has achieved tangible progress in domestic and foreign affairs which are significant guarantees of his rule and the political status quo. The overall modest changes in politics will look to remain stagnant as Mirziyoyev continues to consolidate power, while **the potentially dramatic developments in the economy will either secure or degrade Mirziyoyev's rule in the coming years as he looks to maximize Uzbekistan's trade and multi-vector foreign policy.** Despite non-existent democratization, Uzbekistan's recent (if still somewhat limited) economic and civil society liberalisation, trade potential, and the Mirziyoyev administration's sustained and active search for new partners indicate **that Uzbekistan will remain one of the region's more dynamic partners for EU initiatives.**

## 1.2. Par for the course: Emomali Rahmon's authoritarian grip as Tajikistan's guarantor of stability and predictability

### Stability under the rule of Emomali Rahmon

For many Tajiks, the Civil War of 1992–1997 is an event that serves as a reference point to all other historical occurrences: history is composed of events that happened before the war, during the war, and after the war (Roche, 2014, p. 67). Therefore, the war is a traumatic event which even 30 years later, in the 2020s shapes the **population's expectations for stability and peace, which can be attained by authoritarian means, if necessary.**

In the 2020s, president Emomali Rahmon has continued his consolidation of power. The parliament is under the rule of Rahmon's People's Democratic Party of Tajikistan (PDPT). It is likely that president Rahmon is preparing for a transition of power to his son Rustam Emomali, ensuring a family dynasty (like in Turkmenistan, and likely in Uzbekistan). (Bertelsmann Stiftung, 2024, p. 3) Tajikistan is highly likely to follow its authoritarian and nationalist arc in the coming years.

## Towards a more cohesive state

The rise of a person in social hierarchy in 20th-century-Tajikistan depended often on the position the person had in a smaller societal formation, for example in a village community (Hohmann and Roche 2017: p. 105–106). Political networks and groups were often formed on the basis of territorial origins (Dudoignon 1994: 80). Currently, power is mainly in the hands of Koulabis (from the south and southwest of Tajikistan) and Khoujandis (north).

As a result of the civil war, the elites of mountainous regions at the centre and the south-east of the country have become increasingly marginalised with little modern infrastructure (Bifolchi, 2023a). In 2022, the security forces of Tajikistan eliminated a significant part of informal power structures in the region (Bertelsmann Stiftung, 2024). In the aftermath of the conflict, Tajik security forces have arbitrarily arrested innocent Pamiris, used torture and threats to succumb any opposition (Bifolchi, 2023a). The security forces of Tajikistan have received important assistance in the 2020s from China, Russia and the United States (Bertelsmann Stiftung, 2024, p. 7).

The Tajikistani government has made efforts in recent years to portray itself as seeking to improve the socioeconomic and political situation in the GBAO, notably by creating new job opportunities (mostly in industrial enterprises) and making steps towards cultural consolidation and inclusivity to avoid the escalation of ethnic tensions. Minority activists argue that these measures are to suppress and erase Pamiri identity (Minority Rights, 2024). Therefore, **latest developments seem to point to a stabilisation period in the GBAO, although strong cultural and political tensions between the local population and the government persist** (Khovalar, 2023). If anti-state sentiments would grow in the future, faith-based Ismaili resistance movements could form in the Pamirs (Panfilova, 2022).

The Rahmon's administration is trying to create stronger cultural cohesion across Tajikistan's population by regulating different religious and cultural practices, rituals and festivities (Government of the Republic of Tajikistan, 2024). Quite often, vernacular religious norms collide with officially imposed norms, as excessive religiosity is discouraged by state policies and is not viewed as part of Tajik national culture. Even though the Tajikistani government makes attempts to strengthen the cultural cohesion and national identity of its citizens, the efforts are undermined by the **regional nature of power structures**. Many governmental positions are still distributed according to regional affiliations. (Bertelsmann Stiftung, 2024) The regional culture of Kulob, the Rahmon's birthplace, is prioritised and supported by the national-level state power structures (Zevaco, 2011).

## Relations with Afghanistan and anti-terrorist measures

Tajikistan's post-independence relationship with Afghanistan has remained tense and muddled. From 2002, several bridges between Afghanistan and Tajikistan have been built to enable more fluid bilateral trade, as afterwards cross-border markets were established. While the cross-border trade remains modest at best, Tajikistan is an important source of hydroelectricity for Afghanistan. Informal drug traffic is rampant and benefits elites both on the Tajik and the Afghan side (Bertelsmann Stiftung, 2024, p. 40). Drug traffickers have significant contacts and networks in the state apparatus (Lechaux, 2024). However, future trade development will likely remain limited, as security threats emanating from Afghanistan (in particular the terrorist group Jammāt Ansarullah) make Dushanbe hesitant to embrace Kabul as a full-fledged partner (Sadozai and Blondin, 2022).

While militant Islamic threats emerging from Afghanistan have been a concern for Dushanbe, the Tajikistani government has made suppressing domestic Islamists its top security priority. Clandestine and undercover Islamic organisations have also operated in 21st century Tajikistan, such as the Hizb al-Tahrir al-Islami movement (Kabiri 2007). Since 2015, the Tajikistani authorities have concentrated more on framing the banned Islamic Renaissance Party of Tajikistan as the main security threat in the public discourse instead of radical Islamic groups originating from Afghanistan (Bertelsmann Stiftung, 2024). Anti-terrorist efforts have been an important source for Tajikistan's international cooperation with a range of entities including NATO, SCO, other Central Asian countries, and Russia, who has the most sustained military presence in Tajikistan (Olimova, 2007; Katënëva, 2024).

**It is likely that the threat from Islamic terrorist organisations is exaggerated, as external enemies serve as a means to turn away attention from internal problems.** With few numbers and little material advantages, radical Islamic groups have a low potential for impact in Tajikistan, as the level of state surveillance is high (Bertelsmann Stiftung, 2024). The small opposition forces do not have important technological or military leverage. With the support of actors such as China and Russia, Tajikistan will probably be able to counter any threat posed by internal and external opposition forces, ensuring the stability of Rahmon's regime.

### **A flexible foreign policy**

Tajikistan's foreign policy in the 1990s and the 21st century has been founded on the principle of open doors: the country tries to strengthen its position by balancing its relations and alliances with different foreign countries and powers (Mirzoev and Sanginov, 2020, p. 203–204) such as Russia, China, other Central Asian states, Iran, to a lesser extent Western partners, as well as Turkey and India.

The EU has recently shown stronger interest in economic and political cooperation with Central Asian countries, but the current strong anti-Russian stance might backfire with a stronger Russian involvement in the region (SpecialEurasia OSINT Team, 2025a). As Tajikistan's military is generally assessed as very weak, the country relies strongly on Russian military presence in the framework of CSTO to guarantee its stability and protection (notably on the Afghan border). In addition, Tajikistan is economically heavily reliant on Russia, as a great part of the male population works in Russia to sustain their families in Tajikistan, although a significant part of investments to the country now come from China. All in all, Tajikistan will likely continue to be under strong Russian influence. At the same time, Chinese influence in Tajikistan has grown as well, with the establishment of at least one Chinese military base in the Ghorno-Badakhshan Autonomous Oblast of Tajikistan, which borders Afghanistan. The stability of the region is important for the realisation of China's Belt and Road Initiative. (Bifolchi, 2021).

Tajikistan's recent foreign policy trajectory has been oriented towards cooperation with regional neighbours. Long-term cooperation between Iran and Tajikistan in different sectors, such as technology, mining, agriculture, tourism and counterterrorism, was formalised in January 2025 with the signing of the 22 memorandums of understanding (Boltuc, 2025). In March 2025, the Khujand Declaration, a formal declaration of friendship was signed between Tajikistan, Kyrgyzstan and Uzbekistan. In addition, the border between the 3 states was demarcated. (SpecialEurasia OSINT Team, 2025b).

In conclusion, **Tajikistan is a country that will likely remain in the Russian and Chinese zones of influence**, which will be balanced by cooperation with Uzbekistan, Kyrgyzstan, Iran, and other geopolitical partners. The country has **become more hostile towards Western involvement, but still welcomes Western economic support and donations. At the same time, the political significance of Western aid has diminished, as Chinese loans and credits have grown** (Bertelsmann Stiftung, 2024).

### **Economic prospects and perspectives**

Tajikistan's economic strategy is primarily focused on large-scale projects connected to hydropower and transportation infrastructure. Tajikistan's main exports are aluminium and cotton. (Bertelsmann Stiftung, 2024) Tajikistan has **significant mineral resources**, including lead, antimony, silver, as well as precious and semiprecious stones. Tajikistan is considered as non-reliable by many international economic organisations, as **corruption is rampant in the country** (Bertelsmann Stiftung, 2024). The strong position of state-owned enterprises hinders Tajikistan's economic development and deters investments (Tajikistan Economic Update, 2024). Almost a third of Tajikistan's GDP comes from remittances sent by Tajikistani nationals working abroad (Bertelsmann Stiftung, 2024).

China plays an increasingly important role in Tajikistan's economy. The transport infrastructure between Tajikistan and China is improving significantly (Bifolchi, 2023b). It is in the interest of China to assure better connectivity between the Pamirs, Pakistan, and Afghanistan for future economic projects, which would also benefit other countries and regional actors (Sadozaï and Blondin, 2022). Therefore, it is likely that economic relations between the neighbouring countries will deepen.

Due to its lack of domestic resources, regional barriers, and strong authoritarian tendencies and dependency on Russian and Chinese ties, Tajikistan will continue to be one of the more difficult states for the EU to partner with. **While the Rahmon administration is interested in economic and security opportunities which come from the EU, the current political and economic alignment of Tajikistan greatly limits potential EU cooperation.**

## **1.3. Bloody January: Kassym-Jomart Tokayev at the crossroads between Kazakhstan's democracy and autocracy**

The 2022 protests in Kazakhstan, called "Bloody January," were one of the turning points in the country's modern history and could potentially bring about political change in the post-Soviet space. These protests were unprecedented in their scale, the speed with which they spread across major cities in the country. The rise in the subsistence minimum, the increase in the share of the population with incomes below this level, and the depth and severity of poverty were the main factors that provoked these events (Mukhamediyev et al., 2023). However, despite their significant potential, the results of the protests fell short of expectations and did not lead to changes that could be seen as an achievement of the protesters' goals. (Kudaibergenova & Laruelle, 2022)

Alienation under the country's authoritarian political regime instituted by the 30-year rule of Nursultan Nazarbayev post-independence, in addition to post-2000s economic woes,

and COVID-19 restrictions culminated in an anti-systemic response with the Bloody January protests. The surge in protests was a direct response to the regime's systemic crisis, which blocked the institutionalisation of a new opposition after the failure of the old one. This led to unprecedented violence against the citizens of Kazakhstan, hundreds of whom were killed, injured or subjected to repression. However, the question remains: did the decline of Nazarbayev and the rise of Kassym-Jomart Tokayev as a fully independent actor lead to the reform and democratisation of the political system of Kazakhstan? (Kudaibergenova & Laruelle, 2022)

### **“New Kazakhstan” and “denazarbaevification”**

Although Kassym-Jomart Tokayev was elected president in June 2019, he only became an independent political figure in January 2022, following the events known as “Bloody January.” It was then that Tokayev could break free from the influence of Nursultan Nazarbayev and initiate targeted personnel purges. As a result, most key positions in the government apparatus are now occupied by people loyal to Tokayev. To strengthen his position in society and on the international stage after January 2022, Tokayev announced a series of reforms called “New Kazakhstan.” These reforms were stated to be aimed at democratising the country's political system and institutions and reducing the powers of the head of state (Tlegenova & Beysembaev, 2024). However, as Freedom House and other researchers note, the results of “denazarbaevification” have not led to significant improvements in Kazakhstan's democratic institutions or overall political system. (Freedom House, 2023; Kudaibergenova & Laruelle, 2022; Radio Azattyk, 2024)

Expectations regarding progressive changes were not met. During the referendum on changing the Constitution, as well as the early presidential and parliamentary elections held that same year, numerous violations, pressure and obstacles were recorded that independent observers encountered (Abishev, 2023; Romashkina & Loginova, 2022). Thus, by rebuilding the political system for himself and replacing Nazarbayev, Tokayev strengthened his authoritarian tendencies, which mirror his predecessor's style of governance. **New laws on disinformation and increased censorship in the media have become necessary instruments of political control** (Moldagali, 2024; Vaal, 2023). **While presented as a democratic decentralization of the state, Tokayev's rule has further entrenched authoritarianism in Kazakhstan.**

### **No democratization, but at least pluralization**

Despite the apparent paradox of the situation, Kassym-Jomart Tokayev took steps to liberalise the electoral legislation. For the first time since 2004, elections in Kazakhstan were held under a mixed system, a significant change in the country's political practice. The threshold for registering new parties was also lowered, and self-nominated candidates were allowed to participate in the elections. Although many candidates were still denied registration, independent politicians and opposition representatives could enter the candidate lists. As a result, new active participants representing diverse ideological positions began to appear in Kazakhstan's political discourse. Among them are pro-Ukrainian activists, feminist activists, national patriots advocating excluding the Russian language from public life, and representatives of democratic parties. These changes indicate some transformation of the country's political space, although their impact on democratisation remains questionable. (Abishev, 2023). Formally, we can talk about democratisation since now six parties are represented in parliament instead of three. However, in practice, the balance of

power has remained unchanged. Despite the expansion of the party composition, a significant part of the new political associations are pro-government or pseudo-opposition structures that only imitate the democratic process.

With the transition of power to Kassym-Jomart Tokayev and the abandonment of the tandem with Nursultan Nazarbayev, Kazakhstan's diplomatic relations with other world powers have changed. **As a "regional leader" in Central Asia, Kazakhstan has begun to build more pragmatic relations with superpowers like China, Russia, the United States, and the European Union.** Using its natural resources and strategic geopolitical position, Kazakhstan seeks to mitigate the difficulties that arise in the process of balancing between the great powers of the region. The country continues to adhere to a multi-vector policy of foreign relations, which allows it to ensure the common interest of all major players in maintaining stability in the region. At the same time, there is a tendency towards institutionalising relations with Russia, which remains one of Kazakhstan's key allies. However, despite Tokayev's statements about the importance of Russian-Kazakh cooperation (NUR.KZ, 2024), a certain tension can be seen in bilateral relations, reflecting the changing dynamics of their interaction. (Nyshanbayev et al., 2024)

Despite all the changes, Tokayev has firmly established himself in a position of power which is unlikely to change in the coming years. With at least some domestic political pressure relieved with surface-level changes to the government, and relatively good relationships with relevant international actors, Tokayev will continue to be the central political figure of Kazakhstan for the foreseeable future.

Like Uzbekistan, a certain degree of economic liberalisation and government interest in expanding the state's administrative capacity in Kazakhstan **creates opportunities for increased partnership opportunities with EU entities.** However, Tokayev's entrenched authoritarianism ensures that any EU human rights or civil society will be met coldly.

## 1.4. Kyrgyzstan after the 2020 revolution: suppression of the civil society and friendly neutrality towards Russia

Significant shifts have been taking place in Kyrgyzstan's internal and foreign policies since the country's third post-independence revolution in 2020 under the current leadership of Sadyr Japarov (president since 2021). These changes reflect a broader trend of democratic backsliding, increased alignment with authoritarian powers, and a strategic balancing in the context of evolving regional dynamics.

### Internal policy shifts: centralisation and civil society crackdown

President Japarov's administration has consolidated executive power, often at the expense of democratic institutions, civil society liberties and human rights. In October 2023, legislation was enacted allowing the president to annul Constitutional Court decisions, effectively removing a critical check on executive authority (Freedom House, 2024a).

This trend continued with the adoption of a "foreign agents" law in April 2024, modelled after Russia's 2012 legislation, which is actively applied now to repress Japarov's political and civil society opposition. This law mandates that NGOs receiving foreign funding and engaging in

broadly defined "political activities" must register as "foreign representatives," subjecting them to stringent reporting requirements and state oversight. International observers, including the OSCE and Human Rights Watch, have criticized the law for its potential to stifle civil society and freedom of expression (Reuters, 2024a, 2024b).

The media landscape has also faced increased censorship and repression. Since the initial months of Japarov's leadership in 2021, convictions and prison sentences for several journalists have become regular occurrences, alongside the closure of independent media sources (IFEX, 2024).

### **Foreign policy: strategic alignments and regional engagements**

Under Japarov, Kyrgyzstan has deepened its ties with Russia, as reflected in agreements such as the establishment of a joint air-defence system and the continued hosting of a Russian military base near the capital of Bishkek. The country has also been implicated in facilitating the circumvention of Western sanctions against Russia, with reports of increased trade flows serving as a conduit for restricted goods (The Times, 2024).

At the same time, Kyrgyzstan has been working to develop and deepen its ties with other regional powers. In July 2024, it participated in "Birlestik-2024" held in Kazakhstan - the first recent joint military exercise with Central Asian neighbours (Azerbaijan, Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan in Kazakhstan), notably excluding Russia and China. Additionally, in November 2024, Kyrgyzstan hosted the Organization of Turkic States summit, signalling a commitment to strengthening ties within Turkish-led initiatives. Attempts to resolve long-lasting regional conflicts have also progressed. In March 2025, Kyrgyzstan and Tajikistan signed an agreement to demarcate their shared border (Reuters, 2025).

### **Economic developments: "growth amidst challenges"**

Despite political challenges, Kyrgyzstan's economy grew by 9% in 2024, driven by robust activity in the services and construction sectors. Inflation remained within the target range, and the National Bank of the Kyrgyz Republic maintained the key interest rate at 9%. However, the country's role in facilitating trade that may aid Russia's military efforts has raised concerns among Western nations, potentially jeopardising future economic relations (The times, 2024).

Kyrgyzstan under President Japarov faces a consolidation of executive power, suppression of civil society and media, and strategic foreign policy development, deepening ties with Russia and engagement with other regional actors. While the economy shows signs of growth, these political and foreign policy shifts have significant implications for the country's democratic trajectory and international relationships (The Diplomat, 2024). Like other leaders in the region, the **Japarov administration is interested in partnering with the EU in certain areas** (attracting EU FDI, grants and funding for infrastructure or state services capacity building), but is uninterested if not hostile to civil society initiative of EU-origin concerning human rights of democratization. **Unfortunately, Kyrgyzstan's authoritarian turn and increasing closeness to Russia (also in part due to a lack of domestic resources and**

regional barriers to pursue alternative partnerships), complicates future EU-Kyrgyzstan partnership.

## 1.5. Turkmenistan's third president: totalitarianism becomes a family business

With exceptional opaqueness, Turkmenistan is Central Asia's most difficult state to research. As a totalitarian state, Turkmenistan's post-independence political history is demarcated by the three presidents who have ruled the country: Saparmurat Niyazov (who ruled from independence until his death in 2006), Gurbanguly Berdimuhamedow (who ruled from 2007 to 2022), and Gurbanguly's son and the current president of Turkmenistan, Serdar Berdimuhamedow. Across all three presidents, Turkmenistan's economy and politics have remained relatively stagnant and centralized.

The legislative (Mejlis) judicial branches of government are completely subordinated to the executive's power (Freedom House, 2020b). Beyond the constant reshuffling of government personnel, even the most powerful of the country's elite have seen their careers and fortunes erased instantly by the president's decision (Eurasianet, 2019). The three parties which comprise Turkmenistan's political arena function to either consolidate political power under the executive, or function as sources of minor leverage for regime-aligned economic elites (Isaacs, 2020). Civil society barely exists as the government security services are quick to monitor and suppress anything which deviates from the state's narrative and control.

What has been preserved (if not intensified) over the course of Turkmenistan's independence is that the domestic discourse of the Turkmenistani government rests on a secular nationalism applied to an ethnically homogenous population and a culturally specific, state sanctioned form of Islam (Clement, 2020). Under Niyazov, the dominant political narratives of Turkmen nationalism (as a tribe superior to all others) and the cult of personality around Turkmenbashi (the title of the supreme leader of this tribe) have completely saturated Turkmenistan's politics and suffocated any alternative political reality (Zabortseva, 2020). Both of these aspects serve to centralize political hegemony and overcome regional differences.

Turkmenistan's permanent neutrality is an essential part of the regime's foreign policy as it is a means for maintaining domestic power in that Turkmenistan's neutrality ensures that 1. foreign influence or interest in the country's internal affairs is kept to a minimum; 2. creates a discursive legitimization of the president as the guarantor of Turkmenistan's sovereignty and stability; and 3. provides a stable domestic political ecosystem for regime elites to dominate politics and the economy (Sullivan, 2020).

In recent years, Turkmenistan has adopted a more open, although cautious approach to foreign relations, and as 2025 marks the 30th anniversary of Turkmenistan's Permanent Neutrality, the concept of true neutrality stands at the centre of its global identity. Turkmenistan proposed the resolution "2025 – International Year of Peace and Trust," at the 78th session of the UN General Assembly, which has been touted as a significant achievement in articles published both in international media and some local news around

the world (Soysal, 2025), (Kumar, 2025). In cooperation with UNDP, Turkmenistan is also preparing for World Trade Organization [WTO] membership and integration into the global economy. However, independent reporting and, notably, the country's opposition which exists almost entirely abroad make it apparent that Turkmenistan's political course is determined by the regime's self-interests.

With a heavily centralized state economy, the slow liberalization of the Turkmenistani economy which has trickled throughout the years remains marginal, with the overwhelming majority of any meaningful economic control remaining in the hands of the president's family (Freedom House, 2020). While the executive's family is able to accumulate vast sums of wealth from hydrocarbons, regional clans/patronage networks do have access to their own sources of revenue (primarily cotton, among other resources) (Kurbanova 2023, 109). However, the clear economic and political dominance of the president's Ahalteke tribe creates friction with other regional patronage networks, yet not enough to disturb the status quo (Bohr 2016, 35).

While Turkmenistan's relatively closed, hydrocarbon-based economy (see section 2.2) limits opportunities for outside investment, there are still avenues for expansion. In an attempt to mitigate their economic dependency on oil and gas, Turkmenistan has begun looking into less capital-extensive resource monetization tactics, such as developing a strong export-oriented domestic petrochemical and fertiliser industries, which are already the second and third most valuable of the country's exports. As Turkmenistan has become more open for foreign investments, this sector is expected to be the primary focus of foreign investments in addition to state support. Turkmenistan already has six existing projects for fertiliser and chemical production, and in 2022, two South-Korean companies, Hyundai and Daewoo, signed memorandums of understanding with Turkmenistan for fertiliser plants. Fertiliser production especially has the greatest potential for monetisation of gas resources, through both export revenues and investments from a diverse group of foreign actors, helping Turkmenistan to diversify its revenue base and reduce its dependency on China and Russia in the future. (Bochkarev, 2024).

While Serdar now holds the title of president, Gurbanguly still has an outsize role and influence in the country's political leadership (being head of the upper chamber of parliament, among other roles), with the father-son pair ruling as a tandem (with Gurbanguly having the final say) (Clement, 2023). The mantle of leadership is not being passed on to Serdar alone, as his sister has also been groomed for a future public role in the regime (Eurasianet, 2025b). Unlike Niyazov, the junior and senior Berdimuhamedov have established a dynastical succession, ensuring that power in Turkmenistan remains within their family for the years to come. While power undoubtedly remains within the Berdymukhamedov family, internal friction between the family members suggests a degree of fragility with the power transfer to Serdar remaining partially in limbo (Ibragimova, 2023).

In sum, any negotiations the EU undertakes with Turkmenistan must take into consideration that the end goals of the Turkmenistani state are twofold: to increase the Berdimuhamedov's family's wealth, and to ensure that the family remains in power at whatever cost. While Ashgabat is interested in becoming an EU energy supplier (see section 2.2), **the economic and political arrangements within Turkmenistan greatly limit any potential EU cooperation for the foreseeable future.**

## 2. Changes in regional energy markets

How have Central Asia's roles as energy importer and exporter been changing in the context of geopolitics?

### About this section:

As both an exporter and importer of various energy resources (oil, gas, uranium, and hydroelectric power), the states of Central Asia are an important energy market for neighbouring states. This section examines the two most significant developments in Central Asia's energy markets in recent years, namely a renewed interest in nuclear energy and significant changes in the natural gas exports.

### Key findings:

When examining the cases of Kazakhstan (by way of increasing its nuclear power capacity) and Turkmenistan (by way of increasing its capacity to export natural gas), we witness several trends which have emerged from the 2022 Russian full-scale invasion of Ukraine as well as increasing domestic energy woes:

1. there is increasing competition and innovation for both exporters and importers in Central Asia's energy markets;
2. expansion of energy trade is increasing Central Asia's interconnectivity with neighbouring states;
3. while FDI opportunities and cooperation with foreign contractors can have a positive impact on the economy and energy sectors, there is also potential for developing long-term dependency on the contractor.

While there is clear interest from both the EU and Central Asian states to further develop energy ties (i.e. importing Turkmenistani gas, nuclear infrastructure building by French companies in Kazakhstan), the EU is clearly disadvantaged when accessing Central Asian energy markets given the current geographical and infrastructure limitations (not to mention the political advantages of Russian and Chinese entities).

The EU and South Korea have shown interest in developing nuclear power plants in the region, however, the majority of current projects have contracted Russian Rosatom for the construction and management of nuclear power plants. Connecting the EU gas market to Turkmenistan would require significant expansion of international pipeline infrastructure, something China has already been doing since the 2000s.

With their strong presence in the region, Russia and China have considerably more leverage in negotiations with Central Asian countries. Unless the EU begins to make significant (financially and politically) and potentially risky commitments to accessing the Central Asian energy market, it will remain a tertiary player in Central Asian energy affairs.

## 2.1. Reactor curious: Kazakhstan's exploration of a nuclear-powered future

Recent energy shortages across Central Asia, and concerns about the current geopolitical balance, have begun to push a number of policymakers to more strongly reconsider energy security by employing alternative energy sources. Last year, Kazakhstan held a national referendum on the construction of its first nuclear power plant since independence. According to the Central Referendum Committee, 71,12% of the population voted in favour of the first nuclear power plant (Central Election Commission, n.d.).

Those opposed to the measure have argued that the government has overemphasised the benefits of the plant's construction, while silencing the opposition. The Soviet nuclear legacy has left a deep scar on the people of Kazakhstan that continues to this day. For 40 years (1949–1989), the small town of Semipalatinsk was used as a nuclear test site. More than 450 nuclear tests were carried out by the Soviet military in absolute secrecy from the local population (Kassenova, 2016). The radioactive fallout led to serious illnesses among the local population and a high mortality rate. More than one million people are considered victims of the Soviet nuclear tests.

Despite the collective trauma among Kazakhstan's population, the current government seems determined and enthusiastic about starting the nuclear project. The question of who will be the main contractor for the project remains open, as Kazakhstan has not yet decided. Talks point to four potential companies from France (Électricité de France), China (China National Nuclear Corporation), South Korea (Korea Hydro & Nuclear Power) and Russia's Rosatom (Kassenova, 2024).

The current geopolitical situation has made Russia desperate to reaffirm relations with its old allies and to use various levers to keep them in its sphere of influence. Public opinion in Kazakhstan believes that the choice has already been made in favour of Rosatom in the cabinets of decision-makers, although the official statement has not yet been made public. Russia's Rosatom has numerous nuclear power projects around the world. Hungary, for example, has cooperated with Rosatom despite the war and sanctions, as has Turkey (Szulecki & Overland, 2023).

However, by developing nuclear power capabilities in cooperation with outside actors, the host country can become dependent on the contracting country. Although Rosatom tries to position itself as an independent company, the reality is the opposite, as it is closely linked to the Russian government and works in the interests of the current regime. This phenomenon also reflects the high barriers for EU/Western companies looking to enter this market, as energy procurement can be an insider's game.

As the government is trying to find a quick solution to the country's energy problem, the construction of the nuclear power plant is not an immediate solution and will take up to 10 years. This highlights two problems: the source of money for such a project and the ambitions of the current regime to remain in power at least for the duration of the project. According to the preliminary calculations of JSC Kazakhstan Nuclear Power Plant, the project will cost around \$11-12 billion, but experts always emphasise the optimistic nature of the first stages of such a project (Deutsche Welle, 2024). It should be noted that the entire lifecycle of a nuclear power plant lasts over a century, from planning and construction to

commissioning and decommissioning, which means that the host country will have a long-term dependency on the contractor.

As mentioned above, the current government has not announced who will be a partner in the project. This delay correlates with the ongoing war in Ukraine, as Kazakhstan is fully aware of the reputational risks. The sanctions imposed on Russia make it difficult to procure key components for the nuclear power projects. Although Rosatom has managed to avoid sanctions, its subsidiaries have been affected by the West's reaction.

Another concern is Rosatom's tendency to prolong the operation of worn-out power plants far beyond the original terms, leaving them in an emergency and dangerous state. Cooperation with Russia therefore carries a potential risk of the power plant being exploited beyond its limit.

In the case of Kazakhstan, other contractors offer favourable conditions as well as a democratic approach, while cooperation with Russia reduces the security threat from Russia itself as well as tensions between neighbours. Nevertheless, the presence of a Russian-built nuclear power plant will impact Kazakhstan's future policies in foreign affairs, discouraging certain attitudes and compelling Kazakhstan to adopt a pragmatic approach towards Russia in order to avoid any kind of escalation in their relations.

Kazakhstan is the world's largest producer of uranium and the second largest in terms of reserves. The construction of a nuclear power plant seems logical and has its own advantages apart from the production of electricity. As the state-owned company Kazatomprom is involved in the production of some elements of the nuclear fuel used for different types of reactors, the nuclear sector will benefit from nuclear power. The only obstacle is that Russia is closely involved in the cycle of enriching fuel elements with uranium not only for Kazakhstan's supply chain, but for a majority of the global uranium supply chain. The complex relationship with Russia and its involvement in Kazakhstan's vital sectors makes the choice of contractor problematic.

However, other Central Asian countries do not seem to have hesitated, as Uzbekistan signed an agreement with Russia in May 2024 (Atom Media, 2024) to build several small reactors. Kyrgyzstan, for its part, signed a memorandum with Rosatom in 2022, guaranteeing the Russian company a contract to build nuclear power plants if Bishkek decides to go ahead with constructing one (Geropoulos, 2022). If Russia successfully builds nuclear power infrastructure in any of these states, Moscow will entrench itself even deeper into the region and force the Central Asian countries to further bend their foreign policy decisions to align with Russia's interests.

**Therefore, the EU must strengthen sanctions against Rosatom and its affiliated companies and individuals.** Last year the US imposed measures against the leadership of Rosatom, but the scale has not had a significant impact on their activities as the US and EU markets continue to bring revenues from the cooperation and convert it into weaponry for the Russian army. However, sanctions can work, and the Akkuyu Nuclear Power plant in Turkey is a salient example of their effectiveness (Nuclear Newswire, 2024). Sanctions affect the reputation of the company and make potential clients include this liability in their risk management plans. It has a potential of reverting clients to find another contractor which could prevent them to fall under Russian influence as Rosatom has been a geopolitical tool of Putin's regime.

A coherent implementation of joint sanctions against Rosatom by the EU and Western countries will show their determination in reducing the dependency on the Russian nuclear energy sector. Moreover, it would complicate Rosatom's activities abroad due to the disruption of the supply chain and challenge its authority in such regions as Central Asia and the Global South, opening opportunities for Western contractors to engage with the nuclear sector. However, the EU must make a significant commitment to building its own nuclear supply chain capacity (a process which would take at minimum a decade) if it is to offset Russia's role. **The EU should likewise encourage and/or facilitate the employment of alternative contractors (be they EU or not) as opposed to Russian and Chinese nuclear energy firms.**

## 2.2. Turkmenistan's gas looks for new destinations with murky prospects

With the 4th largest natural gas reserves in the world (equating to roughly 4% of the world's total supply), and making up over half of the country's total exports, natural gas is Turkmenistan's calling card (Hojaniyazov, 2023). Despite gas exports making up the overwhelming majority of the state's revenue, Turkmenistan has only recently abandoned their post-independence passivity and begun to actively seek out new clients (Pannier, 2024a).

China has positioned natural gas as the transitioning step from coal to renewables and in 2022, Turkmenistan took over Russia as the biggest supplier of natural gas to China, even as Turkmenistan's gas costs around 30% more compared to imports from Russia. Turkmenistan's government has, however, insisted on following "global pricing practices", so no agreement for lower prices has been reached, but as pressure from Russian competition will most likely only grow in the near future, Turkmenistan will have to accept price discounts on gas exports to China. (Yakub, 2024), (Bochkarev, 2024). Since the late 2000s, China has become Turkmenistan's largest trading partner (accounting for 65% of Turkmenistan's trade in 2022), and the primary buyer of Turkmenistan's gas exports (Gizitdinov, 2023). With no geopolitical hangups, the overwhelming dependence of the Turkmenistani economy on Chinese gas demand ensures that Ashgabat will remain dependent on Beijing for the foreseeable future, at the very least the next 10 to 15 years.

While a destination for Turkmenistan's gas exports, Russia has proven to be a prickly partner for Ashgabat's energy ambitions, as Moscow has repeatedly angled itself to be the gateway for Turkmenistani gas headed west. Nonetheless, Russia sees Turkmenistan as a competitor for supplying gas to Beijing (Eurasianet, 2024c). Indeed, Russia has begun exporting gas to Turkmenistan's neighbours Kazakhstan and Uzbekistan, while looking to use Kazakhstan's infrastructure to increase their exports to China (Pannier, 2024a). Russia, in attempting to redirect its gas from Europe to China and the Central Asian states (having recently begun supplying to Uzbekistan as well as Kazakhstan, even as Tashkent buys Turkmenistani gas), seems more likely to act as a market competitor to suppliers rather than having a grand gas strategy for the region (Łoskot-Strachota, 2024). The competition between Russia and

Turkmenistan will remain a sour, though likely not become an overtly hostile) subject between Moscow and Ashgabat in the coming years.

Facing increased competition from Russia, Turkmenistan has recently become eager to diversify its gas clientele through different infrastructure projects. The two routes which Turkmenistan has sought to do this with are the proposed Trans-Caspian Gas Pipeline (TCP) and the TAPI (Turkmenistan-Afghanistan-Pakistan-India) Pipeline.

The goal of the TCP is ultimately to connect the European market to Turkmenistan's natural gas exports. The yet to be realized TCP would connect Turkmenistan to Azerbaijan via an underwater pipeline across the Caspian, giving Turkmenistan direct access to the EU's Southern Gas Corridor. While the EU's continued divestment in Russian energy imports has given a geopolitical stimulus to the TCP, progress on the pipeline has been slow (O'Byrne, 2023). Some key points of friction in this regard are differences in the EU's energy policies and Turkmenistan's policies on foreign investments (Zanatta, 2023). Turkmenistan's lack of financial and statistical transparency, and distinct disinterest in allowing non-Chinese companies to explore and develop its inland fossil fuel reserves, make for less-than-inviting conditions for European agencies and companies looking to partner with Turkmenistan.

While the EU has repeatedly expressed interest in energy cooperation with Turkmenistan, differences in policy approaches, geographic limitations, and the economic hegemony of Russia and China continue to leave the EU with limited approaches to deepen ties with Ashgabat (Bayramov & Indeo, 2024). Despite a number of memorandums and earnest verbal interest from both the EU and Turkmenistan, as well as transit states Turkey and Azerbaijan, the fundamental barriers to getting Turkmenistani gas to the European markets remain poorly addressed (Huseynov, 2024a). Notably the European Commission's carbon neutral goals (whose long-term criteria would eliminate the market demand for Turkmenistani gas), and a forecasted modest-at-best demand relative to the initial infrastructure costs to build the pipeline, leave the development of the TCP without a real sense of urgency from Brussels. Other vital questions, such as who will finance and build the \$20 billion pipeline, and how to expand the rest of the Southern Gas Corridor's infrastructure to accommodate the increased gas supply, remain unresolved.

While there is the potential for Turkmenistani gas to reach the EU via Iran and Turkey, sanctions against Iran, and other logistical hurdles have mired Iran as a potential transitory state for EU-Turkmenistani gas exports (Shayan & Basiri, 2023). Despite continually committed interest from Turkey, and even willingness from Iran, Ashgabat's apparent unreliability in talks has stalled progress and left Ankara wanting (O'Byrne, 2024). Moreover, Iran's occasional past fickleness in gas imports leave room for doubt in Ashgabat about Tehran's reliability (Łoskot-Strachota, 2024). Despite this, Turkmenistan has been able to find a new client in Iraq, which will receive a modest amount of Turkmenistani gas in a gas swap with Iran (Pannier, 2024).

TAPI on the other hand, after going through periods of starting and stopping due to disagreements between the various partner states as well as conflict in Afghanistan, has seen modest progress since 2024, but remains uncertain in its timeline and feasibility. With Turkmenistan being the primary financier of the project, the Turkmenistani section of the

pipeline is now complete, the construction of the Afghanistani portion is now underway (Fazl-e-Haider, 2024). However, tensions between Afghanistan and Pakistan, and Pakistan and India, and the presence of militant groups in Afghanistan add a great deal of unpredictability regarding the actual completion and success of TAPI.

Given its geographic, political, and infrastructure limitations as the result of a historically passive policy of diversifying its clientele, Turkmenistan's gas prospects don't look especially bright. With Russia as a reinvigorated competitor for supplying gas in the region, and a lack of foreign investors to build new pipelines to new clients, Turkmenistan for the moment will have to deal with Iran as a less-than ideal-partner for moving Turkmenistani gas westward and south-eastward. While TAPI still holds great potential, an uncertain deadline for completion, and security perils leave its ability to export gas up in the air. While there is mutual interest from both the EU and Turkmenistan in importing more Turkmenistani gas to the EU market, **the current lack of initiative and resources for investment in the necessary pipeline infrastructure ensure that any EU-Turkmenistan energy partnership remains marginal at best.**

### 3. Multi-vectoral foreign policies and developing partnerships in Central Asia

What are the new possibilities for the EU partnerships? How do Russian partnerships with the region's countries impact future EU-Central Asia relations?

#### About this section:

This section examines the various partnerships and alignments that have developed and now define the current relationships of external actors to the Central Asian states. The section examines EU-Central Asia relations (including opportunities specific to Estonia), Russia-Central Asia relations, and the possibility to expand EU-Central Asia connections and trade through the Middle Corridor.

#### Key findings:

Despite geographic and political obstacles, there is a mutual interest between the EU and Central Asian states to develop cooperation on a number of fronts. For the Western partners in many aspects (geopolitics, economy, security), today's Central Asia is a region of potential high risks and high gains. When developing cooperation with the countries of Central Asia in any field, it is important to bear in mind that Central Asian countries will seek to continue cooperation with the Russian Federation when it suits their own interests, while strengthening ties with the EU (Bohr, 2025).

Russia's waning (yet persistent) role adds both opportunity and risk: while some projects are moving faster without Moscow's interference, any resurgent Russian anxiety over "losing" the region could create tensions. Overall, however, the trend toward greater Central Asian agency is growing, but Russia retains a number of sources of leverage. It is critical that the EU highlight the drawbacks for Central Asians leaders when expanding cooperation with Russia, and at the same time seeking alternatives to what Russia offers the Central Asian states.

As of now, the Middle Corridor's potential to circumvent Russia and stimulate EU-Asian trade is significantly underdeveloped. There are several factors which will determine the long-term viability of the corridor as an alternative to Russia, but this depends on the EU and its partners making a decisive strategic commitment to developing the Middle Corridor, and drastically reducing trade with Russia.

### 3.1. EU strategic plans in Central Asia and neighbouring regions

Table 1. EU Strategic Engagement

Region / Country	Security & Military	Economic & Energy	Governance & Diplomacy	Key Goals
Region-wide	<ul style="list-style-type: none"> <li>- Joint commitment to regional stability and counter-terrorism efforts.</li> <li>- Emphasis on border security and combating hybrid threats.</li> </ul>	<ul style="list-style-type: none"> <li>- €10B investment in the Trans-Caspian Transport Corridor under the Global Gateway initiative.</li> <li>- €365M from EIB for sustainable transport, water management, and climate resilience projects.</li> </ul>	<ul style="list-style-type: none"> <li>- Establishment of a strategic partnership between the EU and Central Asia.</li> <li>- Regular high-level summits and ministerial meetings to enhance cooperation.</li> </ul>	<ul style="list-style-type: none"> <li>- Enhance connectivity and trade routes.</li> <li>- Promote sustainable development and regional integration.</li> </ul>
Kazakhstan	<ul style="list-style-type: none"> <li>- Collaboration on cybersecurity and countering hybrid threats.</li> </ul>	<ul style="list-style-type: none"> <li>- €200M loan for sustainable transport and renewable energy projects.</li> <li>- Engagement in critical raw materials (CRM) cooperation.</li> </ul>	<ul style="list-style-type: none"> <li>- EPCA in force since 2020.</li> <li>- Ongoing negotiations for visa facilitation and readmission agreements.</li> </ul>	<ul style="list-style-type: none"> <li>- Strengthen sustainable resource development.</li> <li>- Align with EU standards and regulations.</li> </ul>
Uzbekistan	<ul style="list-style-type: none"> <li>- Focus on regional security and countering radicalization.</li> </ul>	<ul style="list-style-type: none"> <li>- €175M for water management and environmental sustainability, particularly in the Aral Sea region.</li> <li>- €40M to support private sector development in sustainable transport.</li> </ul>	<ul style="list-style-type: none"> <li>- EPCA initialled in 2022; expected to be signed in 2025.</li> <li>- Hosting of the first EU-Central Asia summit in Samarkand.</li> </ul>	<ul style="list-style-type: none"> <li>- Deepen EU-Uzbekistan relations.</li> <li>- Modernize institutions and infrastructure.</li> </ul>
Kyrgyzstan	<ul style="list-style-type: none"> <li>- Emphasis on border security and combating terrorism.</li> </ul>	<ul style="list-style-type: none"> <li>- €50M to strengthen key infrastructure investments through the National Promotional Bank.</li> </ul>	<ul style="list-style-type: none"> <li>- EPCA signed in June 2024.</li> <li>- Participation in EU-Central Asia ministerial meetings.</li> </ul>	<ul style="list-style-type: none"> <li>- Enhance agricultural resilience.</li> <li>- Adapt to climate change impacts.</li> </ul>

Tajikistan	- Cooperation on preventing drug trafficking and human trafficking.	- €100M to support sustainable transport infrastructure on the Trans-Caspian Corridor. - €16.6M grant to support the green transition in the cotton value chain.	- EPCA negotiations concluded in 2024. - Engagement in EU-led training programs for diplomats and officials.	- Improve energy access. - Foster rural development.
Turkmenistan	- Limited engagement; discussions on regional security.	- Potential partner in gas transit; negotiations for a framework agreement with the EIB.	- Low-level diplomatic ties; cautious EU engagement.	- Explore energy cooperation. - Encourage reforms and WTO accession.

### First EU-Central Asia Summit, 4 April 2025

The most serious multilateral development to-date was the first ever EU-Central Asia summit between the leaders of the EU and the Central Asian countries (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan), which took place in Samarkand, Uzbekistan on 4 April 2025. This summit was hosted by the President of Uzbekistan, Shavkat Mirziyoyev, while the European Union was represented by Ursula von der Leyen (President of the European Commission) and also António Costa (President of the European Council) (European Council, 2025a). Prior high-level meetings in the format of the Central Asia-European Union were held in 2022-2023, but no strategic partnership was agreed upon.

This changed in 2025 with the adoption of a joint declaration at the 2025 summit. This joint declaration of the first EU-Central Asia summit indicates that strategic partnership is very important for both the EU and Central Asia states, which now opens up avenues for inter-regional cooperation. An important factor in this case is the changed geopolitical landscape. Russia's military aggression against Ukraine, China's growing influence and changes in US policy have been important factors in the EU and Central Asian countries' decision to upgrade their relations to a strategic partnership (European Council, 2025b).

This establishment of a strategic partnership indicates that there is a great interest in developing mutually beneficial cooperation between the Central Asian states and the EU. Central Asia is rich in natural resources and offers opportunities for investment and cooperation in other areas such as infrastructure development, security, finance, trade, etc. Of these areas of cooperation, a few specific fields are of natural interest given the EU's current policy goals. These include areas such as logistics, transportation, energy sourcing (including "green" hydrogen), joint development of deposits of rare earth elements and rare metals.

Of the Central Asian states, Kazakhstan currently has the most significant trade relations with the EU. More than 3000 different European companies are currently working in Kazakhstan alone. The EU has been the largest investor in Kazakhstan, accounting for 200 billion USD of the 450 billion USD invested in Kazakhstan since its 1991 independence. Deputy Minister of Foreign Affairs of Kazakhstan Roman Vasilenko emphasized that by the end of 2024 the European Union became the largest trade partner of Kazakhstan. The total trade turnover with the EU amounted to 49.7 billion USD out of 140 billion USD trade turnover

between Kazakhstan and all of its trade partners. This is more than Kazakhstan's trade with China in 2024 (44 billion USD) as well as Russia (27.8 billion USD) (Weisskopf 2025). However, what warrants caution is that this significant increase in trade between Kazakhstan (and other Central Asian states) and the EU is also in part due to EU countries circumventing EU sanctions against Russia by exporting goods to Central Asia for re-export to the EU.

Despite geopolitical barriers, the outcomes of the first EU-Central Asia summit and the potential of the Middle Corridor, as well as already growing trade relations, indicate that the economic horizon for the EU and Central Asia has strong potential to further strengthen economic ties between the EU and Central Asia. The number of EU countries that focus on state-based strategies for developing cooperation with Central Asian countries is rapidly increasing (the most active are Germany, France, and Italy). However, these expectations must be tempered by the middleman role that Central Asian states are for EU goods bound for Russia.

### **Opportunities and barriers for Estonian cooperation**

Within the various EU-Central Asia areas of partnership, there are several of which Estonia is especially well suited to play a significant role.

- **Digital Connectivity:** The EU launched the TEI Digital Connectivity project to enhance satellite communications, expand broadband internet access, and support digital innovations in Central Asia. With Estonia's dynamic tech sector and government digitalization capabilities, Estonian entities can excel in offering their expertise and services to Central Asian partners.
  - A potential area for cooperation between the EU and interested Central Asian countries would be implementing e-government systems, widespread digitalisation of financial transactions, and development of digital platforms that facilitate more transparent procurement processes. This presents a unique opportunity for Estonia, considering its experience in digitalisation of government functions and relatively fast development of widespread card payment systems, which has had a notable impact on past high corruption levels.
- **Climate and Environmental Initiatives:** Key projects include the "SECCA" project, the Water and Energy Program (CAWEP), and "Green Central Asia," focusing on effective water resource management and environmentally friendly energy development. Having had to transition from Soviet infrastructure and technology to more modern and green alternatives, Estonian expertise can help Central Asian states where similar Soviet technology and infrastructure is still being used.
- **Human Rights and Governance:** Having successfully transitioned to a liberal democracy following Estonia's second independence, Estonia (and the other Baltic states) possess a legitimate experience and unique voice to address the legacies of Soviet authoritarianism with which the societies of Central Asia have also had to deal with. While opportunities remain limited, Estonia must not discount its shared history with the countries of Central Asia when advocating and aiding democratization in potential civil society and government initiatives. As Estonians in exile played a major role in informing foreign governments and international institutions about Estonia's situation under Soviet occupation, Estonia now has a unique opportunity to help Central Asian diaspora raise awareness on the human rights abuses in their home countries. Cooperating with the diaspora will inform better Central Asian policies, especially in the case of Turkmenistan, where, contrary to official rhetoric and promised changes, poverty, famine, and human rights abuses are still widespread.

- Education and Capacity Building: The EU supports programs like DARYA (Dialogue and Action for Resourceful Youth in Central Asia) and offers training for diplomats and officials from Central Asia to promote governance and institutional reforms. The Estonian School of Diplomacy has hosted and educated a number of students from Central Asian states, and may play an even larger role in capacity building education to the future leaders of Central Asia.
  - Besides EU programs, Estonia can also benefit from developing joint bilateral educational and research projects, exchange programs for 1) preparation and training of Estonian specialists focusing on Central Asia; 2) forming a common intellectual and professional environment for strategic cooperation; 3) supporting and developing civil society institutes and values. This includes media literacy and increasing resilience to hostile disinformation targeting populations in the Central Asian region.
  
- Best Practices for Countering Hybrid Threats: Both Estonia and the Central Asian countries have experience countering hybrid threats that they could share with each other. Estonia has experience countering cyber-attacks and disinformation stemming from Russia, as Estonia is particularly strong in cyber security (Cyber Security 2025). On the other hand, Central Asian states have extensive experience countering terrorism (e.g., ISIS-Khorasan, Taliban etc), radical Islamism and other forms of radicalization, which could be useful for expanding Estonia's security capacities.
  - However, given the security ties between the Central Asian states, Russia, and China, professional exchange in the field of security would need to be tightly controlled and of a limited nature.
  
- Small-scale Green Energy Development: Although Central Asian countries are well aware of the environmental and health impacts these industries have, developing cleaner alternatives is a long-term undertaking. The current energy situation in Central Asia is already critical and is projected to worsen due to climate change and aging infrastructure, so Russian and Chinese investments into coal mining, oil and natural gas production provide apt relief for the most acute problems. Despite Central Asia's close connections with Russia and China, Central Asian states have become more open towards cooperation with the EU, especially as the environmental crisis in the region grows more acute.
  - Smaller scale wind, solar, and hydro energy development and application, especially in cooperation with smaller local businesses, can be a good alternative to risky large-scale projects. For the Central Asian countries, construction of new energy infrastructure presents an opportunity for furthering foreign relations and achieving greater autonomy by working towards a more balanced distribution of power and influence between the different (state) actors interested in the region.
  
- Diversification of economic cooperation: Smaller investments into a diverse group of non-governmental actors, including small businesses and startups can mitigate risks of corruption and violation of intellectual and/or property rights. The local level business and startup community, especially its younger members who in many cases have acquired part of their education abroad (e.g. in Korea, where many Uzbek and Kazakh youths attend business colleges) often hold more liberal values, some are also active members of opposition. Investment into smaller local businesses can help promote democratic values through local grassroots initiatives.

- However, insofar as European investments and government aid is contingent on the recipient state's enactment of democratic reform or transparent handling of resources, offers from Russia and China, which have no such requirements, are often favoured. Moreover, authoritarian states tend to act faster and more decisively compared to democracies, and quicker proceedings can lend further legitimacy to current authorities. In the case of Central Asia, the elites' and governments' ties with Russia and China gives Russian and Chinese enterprises a clear advantage in cooperating with local authorities.

However, there are several problems and challenges for the EU, and Estonia in particular, in terms of possible cooperation with the Central Asian countries. A serious problem for Estonia and other EU and Western democratic countries that deal with and invest in Central Asian countries is the increasing tendency towards authoritarianism in the region, as well as issues such as the oppression of human rights, including freedom of speech. Another issue is Central Asia's role in circumventing international sanctions against Russia by transiting sanctioned goods from outside the region to Russia's borders, in addition to other forms of cooperation between Russia and the Central Asian states (which are covered in the following section).

### 3.2. Russia's presence in Central Asia

Recent developments in Russian policies concerning Central Asia during 2024–2025 reflect a shifting geopolitical landscape, with Moscow striving to maintain its influence amid growing challenges from Western engagement, China's expanding presence, and regional shifts. The Eurasian Economic Union (EAEU) remains a central instrument in Russia's strategy to foster economic integration, political ties and ideological influence within the regions. The next meeting of the EAEU 2025 aims to restrain current memberships and engage new partners.

**Table 2. Russia's presence in Central Asia and neighbouring regions**

Region / Country	Initiative / Action	Period	Type	Details / Outcome
Uzbekistan	Strategic military partnership agreement	2024–2025	Military	Agreement covers 2026–2030; shows tightening bilateral defence ties.
Kazakhstan	Joint Central Asian military exercise ("Birlestik-2024") without Russia/China	2024	Defence / Autonomy	First time CA states exercised without Russia, reflecting increasing regional independence.

Region-wide	Leaked report reveals Russia's concerns over influence loss	2024	Strategic assessment	Acknowledged diminishing appeal of CSTO and Russian influence due to sanctions.
Region-wide	Preparations for second Russia-Central Asia summit	2024-2025	Diplomatic engagement	Continuation of Russia's summit diplomacy to retain influence.

Russia appears concerned that the European Union and European countries are showing growing economic, political, and other interests in Central Asia. The Kremlin is trying to increase its influence in the region, as well as in Eurasia, by expanding the EAEU. This Russian expansion poses a serious challenge and threat to the European Union and its interests, investments and businesses in Central Asia.

Russia has long-standing historical, cultural, and economic and political ties and interests in Central Asia. However, Russia remains a secondary, yet still important, regional actor compared to China. Among the regional centres of power (China, Russia, Turkey, Iran), Russia certainly has the best infrastructure and networks in Central Asia. It has political, economic, military, informational, financial and other channels of influence and hybrid influence in the region through organizations such as the Collective Security Treaty Organization and the Eurasian Economic Union (Sazonov & Solovyeva, 2024).

Russia is trying to expand the EAEU regionally and globally and trying to increase its (Russia's) role in the union. One year ago the Kremlin organized the EAEU summit which took place in Moscow on May 8, 2024. This could be seen as a response to the EU-Central Asian meetings which took place in 2022-2023 (Caliber.Az 2024). Russia is trying to expand the EAEU in Eurasia but also in other regions as well. On December 26, 2024, at the Supreme Eurasian Economic Council meeting, the heads of state of the Eurasian Economic Union (EAEU) approved the main directions of the EAEU's international activities for 2025. The priority for Russia is to continue the dialogue on trade and economic issues with the nearest neighbours, to develop cooperation with the Union's observer states, to strengthen cooperation with key integration associations in Eurasia (among them Central Asia, China).

### **Sanctions, shadow economic growth, escalating risks**

Trade relations between Central Asia and Russia are flourishing. The number of Russian companies operating in Central Asia is constantly increasing. While many of these businesses benefit from membership in the Eurasian Economic Union, others are directly influenced by Moscow and help to support the Russian economy. There are particularly significant moves in the energy sectors of Kazakhstan and Uzbekistan in an attempt to enter new markets due to the sanctions imposed against. Central Asia (and Turkey) plays a key role in the geographical redirection of Russia's trade flows, and the number of trade corridors crossing the region is growing (Bohr 2025). Another danger cannot be ruled out, i.e. Estonian and other EU countries' business interests may be compromised by the fact that companies may unknowingly start cooperation with Central Asian companies that help Russia to

circumvent sanctions and supply goods banned by the EU and the USA to Russia (GuildHall, 2024).

During the last three years, parallel imports have brought strong economic growth and more financial freedom (from the direct investments of Russia and China) to the Central Asian countries (Solovyeva et al., 2024). On the other hand, parallel imports increase the risks for the future, both for the Central Asian states and their Western partners in that: 1) parallel imports deepen Central Asian co-dependence with Moscow as well as increase Russian political influence through the enrichment of local authoritarian regimes; 2) Russia's active attempts to keep and involve members in the economic initiatives strategically extend to political/ideological influence and military engagement. Both aspects are now highly problematic for the Central Asian states, which try to limit and counterbalance Russia's influence and pressure to the degree that they can. For the EU, Central Asian parallel imports undercut member states' efforts to limit Russia's ability to influence and threaten its neighbours. **The longer parallel imports continue and expand, the less leverage the EU has against Russia, and the more hazardous trade with the Central Asian states becomes to European security.**

Despite the variety of tones in relations between local ruling regimes and Moscow, none of the Central Asian countries and their military contingents so far are involved in the war in Ukraine. Moreover, there are strong policies restricting such engagements, including: investigations and closing the institutions of Russia's propaganda and unofficial recruiting points (for example, an active network organisation "Russkij dom", which offices were closed in 2024 in Azerbaijan and in 2025 in Kyrgyzstan); in some countries (including Kyrgyzstan) the criminal penalties with several years' imprisonment have been introduced for the citizens who signed a contract with the Russian military; an increase in the volume of diplomatic requests and notes of the Central Asian countries to the Russian governments concerning racist and xenophobic attacks on Central Asian migrants in Russia.

These issues are compounded by increasing pressure from Russia on the Central Asian countries to be present at military events - as symbolically at the 9 May Moscow 'parade', as practically at the announced joint exercises Zapad-2025 of the Collective Security Treaty Organization (CSTO), to be held in Belarus and Russia in September 2025.

These disputes between Russia and the Central Asian states have a prescient tone in the context of societal shifts in Central Asia. Russia's full-scale invasion of Ukraine has accelerated the process of decolonisation in Central Asian countries, which was already going well there before 2022. Despite Russia's attempts to stop this change, decolonisation is likely to intensify, especially as the former Soviet-born elite in power gives way to a younger generation with limited Russian language skills and no historical memory of the USSR. This is a problem for Russia, because it needs Central Asia as a channel to circumvent sanctions, redirect trade flows and demonstrate the presence of allies. That is why Russia will try to preserve everything that still links the region to the former colonial centre: pipelines, railways, and elite relations (Bohr 2025).

**To counter maligned Russian influence in the region, the EU must prioritize the following:**

- The EU must strengthen its internal policies and measures for limiting the export of parallel imports to Central Asia which are redirected to Russia. This is the one political decision that is firmly within the political capabilities of the EU, and an effective measure to argue against accusations of double standards and hypocrisy.
- The EU must advocate to Central Asian leaders that continued parallel imports weaken their sovereignty and create long term dependencies on Russia for short term gains. The EU must provide incentives and alternatives for Central Asia

countries to be compensated by the loss of revenue should they reduce the volume of parallel imports headed to Russia.

### 3.3 The Trans-Caspian Route: Challenges, Prospects, and the Role of Central Asia

Both for the Central Asian countries and the EU, one of the principal dependencies on Russia is represented in different highly monopolised transport infrastructure and geographic location. The development of trade and transportation routes which circumvent Russia is not only to the interests of the EU, but of actors like Turkey and China as well.

Among the key issues of mutual interest regarding logistics and transportation for the EU and Central Asian states is the Trans-Caspian Transport Corridor (known also as Middle Route) which would connect the EU to China through Central Asia. The route may likely become an alternative to the Northern Route (where Russia connects China and the EU) in a number of commodity positions. The total trade turnover with it amounted to 49.7 billion USD out of 140 billion USD trade turnover with the whole world. The Trans-Caspian transportation corridor allows the delivery of cargoes from Central Asia to European countries. Cargo transportation along the Trans-Caspian transport route has grown eight times in recent years – from 560,000 tons in 2021, to 4.5 million tons in 2024, the forecast for this year – 4.9 million tons, and up to 2029 – 10 million tons. The recent summit, and increasing trade volume of the Trans-Caspian transport corridor reflect the increasing potential for greater sustained EU-Central Asia economic partnership (Weisskopf, 2025).

Particular emphasis has been placed on the Trans-Caspian International Transport Route (TITR), as the most direct alternative trade corridor connecting China with the European Union via Kazakhstan, Azerbaijan, Georgia and Turkey. The implementation and activation of the TITR can significantly enhance the economic potential of the countries in the region, creating the preconditions for the sustainable growth of domestic economies and their integration into global supply chains. (Drost et al., 2025)

Despite its significant potential, the project faces several challenges that hinder its large-scale implementation. One of the key issues holding back the development of the TITR is its limited throughput capacity, which is estimated at only 5% of that of the Northern Corridor. Following the outbreak of hostilities in Ukraine and the corresponding increase in traffic volumes, the route has proven unable to cope effectively with the load. As a result, transit times have increased to 40 days or more, while the original forecast was 15–20 days. The infrastructure deficit is particularly acute, with a shortage of Caspian Sea transport vessels, locomotives, and wagons needed for efficient logistics. These constraints have contributed to a sharp increase in demand, leading to a rapid rise in short-term transportation costs. (Walter, 2022)

While capacity expansion efforts are underway, concerns remain about the long-term viability of the project (Drost et al., 2025; Huseynov, 2024b). The long-term effectiveness of the Middle Corridor presupposes political stability and a high level of management competencies in the countries along the route (Chang, 2023). However, the region faces several structural problems, including excessive bureaucratisation of corruption and general political and institutional instability, aggravated by periodic border conflicts (Eldem, 2022).

## Scenarios for the EU

The key issue in this context is the direction the European Union will take regarding the TMTR. In the event that the invasion of the Ukraine comes to an end, and that relations with Russia are normalized, and if the West moves towards a more pragmatic model of foreign economic cooperation, there is a high probability of restoring the logistical attractiveness of the route passing through the territory of the Russian Federation. This route is characterised by significantly lower costs and high delivery speed, given the presence of an already developed transport infrastructure, which eliminates the need for large-scale investments in its modernisation.

In contrast, the Middle Corridor is characterised by higher transportation costs and logistical complexity, primarily due to the need for multimodal transportation (Aguiar, 2025). If these conditions persist, there is a risk that the Middle Corridor may lose its competitiveness compared to the Northern Corridor, especially if the previous trade and transport links with Russia are restored. It should be noted that despite the armed conflict in Ukraine, which has been ongoing for over three years, this has not led to a complete stop in the functioning of the northern route. Between 2022 and 2024, it continued to serve as the main transportation channel between China and the European Union. Although the volumes of cargo transportation varied, this route retained its importance in commercial logistics (Kuś, 2024; Zhang, 2023). At the same time, despite efforts to develop it, the Middle Corridor continued to perform as a predominantly secondary route. (Avdaliani, 2025)

In the case that the European Union views the TITR as a tool for diversifying trade relations, regardless of its effectiveness, and a means of further strengthening the partnership with the Central Asian countries. In that case, this route may become one of the additional and alternative trade routes between China and the EU (Abbasova & Allison, 2025). The active involvement of Central Asian countries will not only enhance their geopolitical importance but will also open up new opportunities for economic cooperation both within the region and with external partners (Mrini, 2024).

**However, to achieve this result, it is necessary to fully realise the potential of the Middle Corridor and turn it into a viable alternative to the Northern Route.** The implementation of this task requires the fulfilment of two key preconditions: ensuring security and attracting investment. Regarding security, the European Union should promote the de-escalation of regional conflicts to minimise the risks of disruptions in the functioning of the Middle Corridor (Chang, 2023). From an investment perspective, the priorities should be to expand the railway infrastructure, increase the capacity of Caspian ports, establish an effective logistics connection between the Caspian and Black Seas, and promote digitalising logistics processes. In the latter aspect, Estonia can play the role of a potential mediator and technology partner with relevant experience in the field of digital transformation. (Ozat & Nelson, 2023).

To make the Middle Corridor work as a functional alternative to Russia as a bridge between the EU and Asia, **the EU and its partners must make a decisive commitment to making the Middle Corridor a more economically viable and politically attractive alternative to the Northern Corridor.** A more thorough strategic plan must be developed to ensure a unified approach across all actors in order to expand the capacity of the Middle Corridor. **This would entail a strategic commitment by the EU to purposely and permanently reduce trade relations with Russia for the next several decades**

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