

# DGAP POLICY BRIEF

## CHANGING REGIONAL ORDERS

# Central Asia's Shifting Regional Dynamics

## Navigating the Impact of Russia's War Against Ukraine



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Russia's full-scale war against Ukraine has caused Central Asian states to question the political, economic, and security role that Russia previously played in the region. To reduce their dependency on Russia and guarantee security, these five states are increasingly adjusting their relationship with Moscow, enhancing regional autonomy, and expanding international partnerships. Russia's full-scale war has accelerated these existing trends.

- Although Central Asian states are increasingly distancing themselves from Russia, they are not turning away from it. As they strive to benefit from Russia's international isolation, they have even deepened relations in some areas.
- Russia's war led to strengthened intra-regional cooperation, fostering regional autonomy.
- More than ever, Central Asia needs to diversify its economic and security relations. The role of players such as China and Türkiye is growing.
- The war has increased the mutual interest of the EU and Central Asia in diversification. While EU-Central Asia relations are stronger, the EU's role in the region remains limited. Thus, the EU and Germany should adapt their Central Asia policy.

Since February 2022, Russia's full-scale war against Ukraine has deeply affected the post-Soviet states that neighbor Russia and that Moscow continues to see as its sphere of influence. These include the five countries of Central Asia – Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan. All are closely linked to Russia through strong relations related to trade, energy, the military, and migration, as well as their shared Soviet legacy. So far, Russia has served as a security guarantor in the region. For Central Asia, the war has changed the threat perception of Russia, increased the risks of over-dependence, and called Russia's future role and influence into question. Furthermore, Russia's changing role impacts the engagement of other players in the region such as China, Türkiye, and the Gulf states. Since the war, Germany and the EU have also been paying increased attention to the resource-rich region with its strategic location between Europe and Asia.

This DGAP Policy Brief examines how the regional order in Central Asia (CA) has been impacted by Russia's full-scale war against Ukraine. It analyzes the changing role of Russia and evolving intra-regional cooperation in CA. It also assesses the role of other key players in the region, including the EU, in terms of regional security as well as economic and political affairs. The paper argues that the war has increased Central Asian efforts to readjust their relations with Moscow, balancing dependence by strengthening international partnerships and intra-regional cooperation while maximizing profits from Russia. Europe is a key partner, but just one among several. Thus, the EU and Germany need to adjust their Central Asia policy to fully exploit the potential and leverage they have in the region due to their significant economic power.

## BALANCING PROXIMITY AND DISTANCE TO RUSSIA

Russia's invasion of Ukraine in February 2022 shattered Moscow's previous role as a guarantor of security in CA against internal and external threats like terrorism, separatism, and extremism, especially from Afghanistan. This role was based on numerous bilateral military agreements; being the main arms supplier; having military facilities in Kazakhstan,

Kyrgyzstan, and Tajikistan; and its dominance in the regional security alliance, the Collective Security Treaty Organization (CSTO). Only a few weeks before its invasion, Russia demonstrated this dominance by deploying CSTO troops – mainly Russian and Belarusian forces – to Kazakhstan. This operation, CSTO's first combat deployment ever, was implemented “to restore order” there after peaceful protests over rising energy prices escalated into the largest nationwide protests since the country's independence.

## *The distancing of the CA states from Russia does not imply a complete breakup*

The start of Russia's large-scale war against Ukraine marked a watershed event calling both Russia's capacity and willingness to continue being a security guarantor in the region into question. Russia's war against Ukraine has not only weakened its military capabilities but has also raised concerns in the Central Asian states about their own territorial integrity.<sup>1</sup> In addition, the war made Russia's role as a key trading partner and investor in the region uncertain and created fears related to economic instabilities. For example, due to its shared border with Russia and membership in the Eurasian Economic Union (EAEU), Kazakhstan's annual inflation rose to 20 percent in December 2022 – the highest since the mid-1990s. In 2023, however, it recovered to almost prewar levels.<sup>2</sup>

As a result, the five Central Asian states have been readjusting their relationship with Russia to reduce dependency and risks. On the one hand, they do not actively support Russia's war but maintain neutrality – a compromise to avoid both angering Russia and

1 This was particularly true in Kazakhstan in the first year of the war due to aggressive public statements by Vladimir Putin and other Russian representatives. Ria Novosti, “Советский Союз - это историческая Россия, заявил Путин [The Soviet Union is historical Russia, Putin said],” June 17, 2022: <https://ria.ru/20220617/sss-1796292184.html> (accessed August 21, 2024).

2 Bureau of National Statistics, “Inflation in the Republic of Kazakhstan,” January 3, 2024: <https://stat.gov.kz/en/industries/economy/prices/publications/113724/> (accessed August 21, 2024).

being subject to Western secondary sanctions.<sup>3</sup> This distancing from Moscow, which had already been evident since their non-recognition of the illegal annexation of Crimea, has intensified as they have assessed the risks of over-dependency on Russia. This trend is most visible in Kazakhstan, followed by Uzbekistan. The other three states are more cautious, with Kyrgyzstan remaining closest to Moscow. Moreover, due to high risks and spill-over effects, the war has diminished the attractiveness of Russia's regional organizations, the EAEU and CSTO, and made further integration rather unlikely.<sup>4</sup>

On the other hand, the ongoing distancing of the Central Asian states from Russia does not imply a complete breakup or a loss of Russia's significance. Rather, these states aim to mitigate risks associated with over-dependence while simultaneously benefiting from a Russia that is economically weakened, sanctioned, and politically isolated by battling a long war. Consequently, relations are even deepening in some areas. Russia's isolation from the West has made Central Asia more politically and economically important for the country. In fact, Russian President Vladimir Putin chose to visit all five Central Asian states in 2022 to deepen political ties and reinforce Russia's regional role – his first foreign visits after the invasion.<sup>5</sup>

While all these states have officially complied with Western sanctions, they have actually turned into key partners for Russia to circumvent sanctions and obtain much-needed military and dual-use technology from the West. This is especially true of Kazakhstan and Kyrgyzstan.<sup>6</sup> Their support for Russia stems from economic interest. Increased trade and

the relocalization of Russian and international companies to Central Asia, among other factors, have contributed to Central Asia's economic growth.<sup>7</sup>

Furthermore, Central Asian-Russian energy relations, which were already close, have intensified since the war. In late 2022, Putin proposed a tripartite gas union among Russia, Uzbekistan, and Kazakhstan to facilitate Russian gas exports to them and also to China.<sup>8</sup> In 2023, Uzbekistan started importing Russian gas via Kazakhstan with plans to increase volumes from 2.8 to 11 billion cubic meters per year by 2026.<sup>9</sup> A domestic energy crisis had caused Tashkent to see the imports as necessary despite its previous concerns about over-dependence. Agreements were also made to increase Russia's oil exports to Uzbekistan and China via Kazakhstan.<sup>10</sup> For its oil exports, Kazakhstan remains heavily dependent on Russia; around 80 percent of its exports flow through the Russian-controlled Caspian Pipeline. Yet, while this energy interdependence has increased Moscow's leverages over Central Asia, it also became more dependent on the region. Since 2022, Moscow has needed alternative markets for resources previously supplied to the West. Similarly, the location of the Central Asian states has made them strategically important for Russia's expansion of alternative transport corridors to countries in the South, including Iran, Afghanistan, and India.

Domestically, Russia's authoritarian regime and practices to control society have so far been a model for the Central Asian governments. Throughout the region, repression against civil society and media has intensified in recent years. Examples of this trend include the violent suppression of protests in

3 E.g., they abstained from votes on resolutions concerning the war in the United Nations General Assembly. They did not recognize the Ukrainian territories annexed by Russia and sent humanitarian aid to Ukraine. See: UN Resolution A/RES/ES-11/2, "Humanitarian consequences of the aggression against Ukraine," March 24, 2022: <https://digitallibrary.un.org/record/3965954?ln=en>; Resolution A/RES/ES-11/6, "Principles of the Charter of the United Nations underlying a comprehensive, just and lasting peace in Ukraine," February 23, 2023: <https://digitallibrary.un.org/record/4003921?ln=en>; Catherine Putz, "Uzbekistan, Kazakhstan dispatch humanitarian aid to Ukraine," *The Diplomat*, April 11, 2022: <https://thediplomat.com/2022/04/uzbekistan-kazakhstan-dispatch-humanitarian-aid-to-ukraine/> (all accessed August 21, 2024).

4 Temur Umarov, "Russia and Central Asia: Never Closer, or Drifting Apart?," *Carnegie politika*, December 23, 2022: <https://carnegieendowment.org/politika/88698> (accessed August 21, 2024).

5 Ibid.

6 Rahimbek Abdrahmanov and Kamshat Zhumagulova, "How Kazakhstan Helps Russia Bypass Western Sanctions," *The Diplomat*, October 25, 2023: <https://thediplomat.com/2023/10/how-kazakhstan-helps-russia-bypass-western-sanctions/>; Maria Zholobova et al., "Kazakhstan Has Become a Pathway for the Supply of Russia's War Machine. Here's How It Works," OCCRIP, May 19, 2023: <https://www.occrp.org/en/investigations/kazakhstan-has-become-a-pathway-for-the-supply-of-russias-war-machine-heres-how-it-works> (both accessed August 21, 2024).

7 E.g., Kazakhstan's annual GDP growth has risen to 5.1 percent in 2023 after falling from 4.1 to 3.3 percent in 2022. International Monetary Fund, "Regional Economic Outlook: Middle East and Central Asia," April 2024: <https://www.imf.org/en/Publications/REO/MECA/Issues/2024/04/18/regional-economic-outlook-middle-east-central-asia-april-2024>; International Monetary Fund, "Republic of Kazakhstan. Country Data": <https://www.imf.org/en/Countries/KAZ> (both accessed September 3, 2024).

8 Government of Russia, "Встреча Михаила Мишустина с Президентом Республики Казахстан Касым-Жомартом Токаевым [Meeting of Mikhail Mishustin with the President of the Republic of Kazakhstan Kassym-Jomart Tokayev]," November 28, 2022: <http://government.ru/news/47164/> (accessed August 21, 2024).

9 President of Russia, "Launch of Russian gas supplies to Uzbekistan via Kazakhstan," October 7, 2023: <http://en.kremlin.ru/events/president/news/72453>; <https://kun.uz/en/news/2024/05/28/russia-intends-to-boost-gas-supplies-to-uzbekistan> (accessed August 21, 2024).

10 Ministry of Energy of Uzbekistan, "Объемы поставок нефтяного сырья из России в Узбекистан будут увеличены [Volumes of oil supplies from Russia to Uzbekistan will be increased]," November 4, 2023: <https://minenergy.uz/ru/news/view/3357>; Tatiana Mitrova, "Russia's Expanding Energy Ties in Central Asia," Center on Global Energy Policy, February 29, 2024: <https://www.energypolicy.columbia.edu/russias-expanding-energy-ties-in-central-asia/> (both accessed August 21, 2024).

Kazakhstan in 2022, which resulted in 238 deaths and several thousand injured according to official figures, and similar crackdowns on protests in Tajikistan and Uzbekistan that year.<sup>11</sup> The war has reinforced this since external insecurity increases the regimes' interest in domestic stability. Following Russia's lead, legislatures throughout the region introduced changes to further restrict media, internet freedom, and civil society organizations.<sup>12</sup> Kyrgyzstan's 2024 legislation on "foreign representatives," for example, mirrors Russia's Foreign Agent Law. It places NGOs that receive foreign funding under strict control and restriction.<sup>13</sup>

However, while serving as a model before, Russia's current path toward totalitarianism can hardly be viable for Central Asian leaders. Repression alone offers no sufficient answer to the growing societal dissatisfaction, as expressed in the protests and exacerbated by the war's economic effects. To appease society and ensure regime stability, Kazakhstan's and Uzbekistan's presidents have promised economic and political reforms.<sup>14</sup> Yet, economic hardships combined with shrinking civil spaces may lead to future instabilities, especially because the societies of CA are distancing themselves from Russia faster than the region's political elites. Criticism of Russia and its war is growing, catalyzing societal change and diminishing Russian soft power there. Given that societies in CA have a median age of 26.6 years, major parts of them have not experienced the Soviet Union.<sup>15</sup> Particularly in Kazakhstan and among a young urban population, the

strong role of the Russian language and media is increasingly being questioned.<sup>16</sup> Furthermore, whereas Russia had been the main destination for Central Asian labor migrants, rising anti-Central Asian sentiments and stricter migration policies there have now made it less attractive. Recently, Kyrgyzstan's and Tajikistan's governments have even issued warnings to their citizens against traveling to Russia.<sup>17</sup> For the regimes of CA, which are highly dependent on the migrants' remittances, this is very concerning.<sup>18</sup> Thus, the regimes and the societies are seeking alternative destinations.<sup>19</sup>

## EVOLVING INTRA-REGIONAL COOPERATION AND INCREASING REGIONAL AUTONOMY

The war has not only caused the Central Asian states to readjust their relations with Russia, but it has also driven them to enhance their political, economic, and military capabilities, fostering greater regional autonomy and resilience. Thus, the war has led to a significant increase in intra-regional cooperation among the five countries, mitigating past tensions. Before Russia's full-scale invasion, the country's dominance and integration projects also hindered Central Asian regional integration. In its aftermath, trade turnover among the five has surged by 80 percent since 2018, reaching \$11 billion in 2023.<sup>20</sup> In August 2024, at the sixth Consultative Meeting of the Heads of State – a meeting format

- 11 Prosecutor General's Office of the Republic of Kazakhstan, "Список лиц, погибших во время январских событий [List of people who died during the January events]," August 16, 2022: <https://www.gov.kz/memleket/entities/prokuror/press/news/details/413195?lang=ru>; Human Rights Watch, "Uzbekistan: Police Abuses in Autonomous Region Protests," November 7, 2022: <https://www.hrw.org/news/2022/11/07/uzbekistan-police-abuses-autonomous-region-protests>; Human Rights Watch, "Tajikistan: Long Sentences for Autonomous Region Activists," December 12, 2022: <https://www.hrw.org/news/2022/12/12/tajikistan-long-sentences-autonomous-region-activists> (all accessed August 28, 2024).
- 12 Vsevolod Bederson, "The curse of the 'Black Spot': the diffusion of 'foreign agent' status in Russia and Kazakhstan," *Riddle*, February 9, 2024: <https://rid.li/the-curse-of-the-black-spot-the-diffusion-of-foreign-agent-status-in-russia-and-kazakhstan/>; International Press Institute, "Kazakhstan: IPI urges withdrawal of sudden changes in proposed media law," January 31, 2024: <https://ipi.media/kazakhstan-ipi-urges-withdrawal-of-sudden-changes-in-proposed-media-law/>; Uzbek Forum for Human Rights, "Uzbekistan: President's Broken Promises puts Journalists and Bloggers at Risk," June 2023: [https://www.uzbekforum.org/wp-content/uploads/2023/07/UZBEK-FORUM\\_freedom\\_of\\_speech.pdf](https://www.uzbekforum.org/wp-content/uploads/2023/07/UZBEK-FORUM_freedom_of_speech.pdf) (all accessed August 29, 2024).
- 13 RadioFreeEurope/RadioLiberty, "Kyrgyz President Signs 'Foreign Representatives' Bill Into Law, Amid Criticism," April 2, 2024: <https://www.rferl.org/a/kyrgyzstan-foreign-representatives-agents-law-signed-japarov-president/32887665.html> (accessed August 21, 2024).
- 14 President of the Republic of Kazakhstan, "Послание Главы государства Касым-Жомарта Токаева народу Казахстана [Address of the Head of State Kassym-Jomart Tokayev to the people of Kazakhstan]," March 16, 2022: <https://www.akorda.kz/ru/poslanie-glavy-gosudarstva-kasym-zhomarta-tokaeva-narodu-kazahstana-1623953>; Kun.uz, "Shavkat Mirziyoyev announces the new Uzbekistan's development strategy," November 6, 2021: <https://kun.uz/en/news/2021/11/06/shavkat-mirziyoyev-announce-the-new-uzbekistans-development-strategy> (both accessed August 21, 2024).
- 15 Worldometer, "Population of Central Asia": <https://www.worldometers.info/world-population/central-asia-population/> (accessed August 21, 2024).
- 16 Central Asia Barometer, "Russia-Ukraine War Perceptions In Central Asia," April 21, 2023: <https://ca-barometer.org/assets/files/froala/71cf4c7e5cfe365926deb77c15a4b485234ef802.pdf>; Central Asia Barometer, "What language do the Kazakhs speak at home?," December 12, 2023: <https://ca-barometer.org/en/publications/what-language-do-the-kazakhs-speak-at-home/>; Samuel Doveri Vesterbye et al., "Central Asian Media Consumption and Disinformation," *Internews/European Neighbourhood Council*, March 2023: <https://encouncil.org/wp-content/uploads/2023/05/2023-03-ENC-Report-ENG-V8.pdf>; Demoscope, "POLL: A Third of Kazakhstanis Started Treating Russia Worse after the Outbreak of the War," May 17, 2023: <https://demos.kz/poll-a-third-of-kazakhstanis-started-treating-russia-worse-after-the-outbreak-of-the-war/?lang=en> (all accessed August 21, 2024).
- 17 Eurasianet, "Tajikistan and Kyrgyzstan caution citizens to steer clear of Russia," September 11, 2024: <https://eurasianet.org/tajikistan-and-kyrgyzstan-caution-citizens-to-steer-clear-of-russia> (accessed September 16, 2024).
- 18 In 2022, remittances represented 51 percent of Tajikistan's GDP, 31 percent of Kyrgyzstan's, and 21 percent of Uzbekistan's, primarily coming from Russia. See: Eung Ju Kim, "Remittances to Europe and Central Asia post a strong growth," *Worldbank Blog*, September 1, 2023: <https://blogs.worldbank.org/en/peoplemove/remittances-europe-and-central-asia-post-strong-growth> (accessed August 21, 2024).
- 19 Galiya Ibragimova, "Why Are Central Asian Migrant Workers Spurning Russia?," *Carnegie politika*, August 1, 2024: <https://carnegieendowment.org/russia-eurasia/politika/2024/07/russia-central-asia-migrants?lang=en> (accessed August 21, 2024).
- 20 Saniya Sakenova, "Central Asian Foreign Ministers Meet to Strengthen Regional Cooperation and Unity," *Astana Times*, August 9, 2024: <https://astanatimes.com/2024/08/central-asian-foreign-ministers-meet-to-strengthen-regional-cooperation-and-unity/> (accessed August 22, 2024).

that has taken place annually since 2018 – the leaders committed to enhancing regional cooperation by approving a roadmap for regional cooperation until 2027 and a concept for a Central Asia 2040 strategy.<sup>21</sup> Next to trade regulation harmonization and linking energy and transport infrastructure, they discussed the importance of forming a common regional identity for

## The war has led to a significant increase in intra-regional cooperation among the states of CA

the first time. Kazakhstan and Uzbekistan are driving the emerging integration process, setting an example for the whole region with their progressing bilateral integration.<sup>22</sup> Yet, the future of this cooperation is open. Competition for international trade, foreign investments, and regional leadership may rise alongside cooperation. Its future also hinges on Russia's role. If Russia feels threatened by integration in CA, it might attempt to block it.

## DIVERSIFYING GLOBAL PARTNERSHIPS

In addition to increasing cooperation within their region, the Central Asian regimes are also expanding their engagement with external players to ensure their political, economic, and military security. Due to Russia's war, the multi-vector foreign policy they had already been pursuing has become even more important. To diversify economically, they are seeking alternative trading partners, transport corridors, and investors.

China was already the key partner to balance Russia before the full-scale war. Since then, Beijing has strengthened its role in the region. Yet, the Central Asian goal is not to replace Russia with China but to work strategically with both. China has surpassed Russia in terms of total trade turnover with CA. In 2023, Beijing was the biggest trade partner of Kazakhstan, Uzbekistan, Kyrgyzstan, and Turkmenistan – before Russia.<sup>23</sup> In the context of the war, China is using the region as a hub for re-exporting technology to Russia, thus avoiding Western secondary sanctions.<sup>24</sup> Moreover, China is next to Russia a major investor in CA. Through its Belt and Road Initiative, it invests in infrastructure, mining, and energy sectors.<sup>25</sup> Because the war has increased interest in diversifying transport routes, it has accelerated projects like the China-Kyrgyzstan-Uzbekistan (CKU) railway, which is set to start construction in fall 2024.<sup>26</sup>

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- 21 President of Kazakhstan, „Под председательством Касым-Жомарта Токаева состоялась VI Консультативная встреча глав государств Центральной Азии [The VI Consultative Meeting of the Heads of Central Asian States was held under the chairmanship of Kasym-Jomart Tokayev],” August 9, 2024: [https://akorda.kz/ru/pod-predsedatelstvom-kasym-zhomarta-tokaeva-sostoyalas-vi-konsultativnaya-vstrecha-glav-gosudarstv-centralnoy-azii-971327?utm\\_source=substack&utm\\_medium=email](https://akorda.kz/ru/pod-predsedatelstvom-kasym-zhomarta-tokaeva-sostoyalas-vi-konsultativnaya-vstrecha-glav-gosudarstv-centralnoy-azii-971327?utm_source=substack&utm_medium=email) (accessed August 22, 2024).
- 22 Sanat Kushkumbayev and Aizada Nuriddinova, “Can Central Asia Deepen Multilateral Cooperation Without Institutionalization?,” *The Diplomat*, August 12, 2024: <https://thediplomat.com/2024/08/can-central-asia-deepen-multilateral-cooperation-without-institutionalization/> (accessed August 22, 2024).
- 23 Statistics Agency Uzbekistan, “Внешнеторговый оборот Республики Узбекистан (за январь-декабрь 2023 г) [Foreign Trade Turnover of the Republic of Uzbekistan (for January-December 2023)]:” <https://www.stat.uz/images/uploads/reliz-2023/tashqisavdopresreliz2023dekabr.pdf>; Bureau of National Statistics, “Foreign trade turnover of the Republic of Kazakhstan (January-December 2023),” February 15, 2024: <https://tinyurl.com/2578dkd2>; European Commission, “European Union, Trade in Goods with Turkmenistan,” May 16, 2024: [https://webgate.ec.europa.eu/isdb\\_results/factsheets/country/details\\_turkmenistan\\_en.pdf](https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_turkmenistan_en.pdf); European Commission, “European Union, Trade in Goods with Tadjikistan,” May 16, 2024: [https://webgate.ec.europa.eu/isdb\\_results/factsheets/country/details\\_tadjikistan\\_en.pdf](https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_tadjikistan_en.pdf); European Commission, “European Union, Trade in Goods with Kyrgyz Republic,” May 16, 2024: [https://webgate.ec.europa.eu/isdb\\_results/factsheets/country/details\\_kyrgyz-republic\\_en.pdf](https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_kyrgyz-republic_en.pdf) (all accessed August 22, 2024).
- 24 Maria Zholobova et al., “Kazakhstan Has Become a Pathway” (see note 6).
- 25 E.g., for Uzbekistan, China surpassed Russia as the biggest foreign investor in 2023, accounting for 25.6 percent of total foreign investments; Russia came in second place with 13.4 percent. See: Statistics Agency, “Инвестиции в основной капитал (за январь-декабрь 2023 года) [Investments in fixed capital (for January-December 2023),” January 23, 2024: <https://stat.uz/ru/press-tsentr/novosti-goskomstata/49849-asosiy-kapitalga-investitsiyalar-2023-yil-yanvar-sentabr-3>; Aigoul Abdoubaetova, “China's Belt and Road Initiative in Central Asia,” *OSCE Academy Special Issue 2*, 2020: [https://www.osce-academy.net/upload/file/BRI\\_08\\_07.pdf](https://www.osce-academy.net/upload/file/BRI_08_07.pdf) (both accessed August 22, 2024).
- 26 The CKU is an alternative railway connection from Uzbekistan to China that links to corridors toward Europe, the Middle East, and South Asia. Discussed since the 1990s, the project has long been hampered by Central Asian reservations toward China and unclear financing. Niva Yau, “China Is Finally Making Progress on the China-Kyrgyzstan-Uzbekistan Railway,” *Foreign Policy Research Institute*, March 23, 2023: <https://www.fpri.org/article/2023/03/china-is-finally-making-progress-on-the-china-kyrgyzstan-uzbekistan-railway/> (accessed August 19, 2024).



However, over-dependency on China poses risks. As China's role in CA has grown, so too have Central Asia's reservations toward Beijing and its fear of indebtedness and sovereignty loss.<sup>27</sup> Thus, the governments of the five Central Asian states increasingly intend to counterbalance both Russia's and China's role by strengthening additional international partnerships.

Against this background, the presence of other players in CA has risen. Türkiye, for example, is becoming an increasingly important actor, positioning itself as essential to developing transport links between Europe and Asia. Turkish trade relations and investments in the region are growing. In 2023, Türkiye was among the key trading partners of all five Central Asian states.<sup>28</sup> Engagement with Türkiye is also growing multilaterally through the Organization of Turkic States (OTS), a body that has gained importance as the countries of CA look to engage in multinational organizations independent from Russia. The OTS has already enhanced cooperation between Türkiye and Kazakhstan, Uzbekistan, Kyrgyzstan, and Azerbaijan in various areas.<sup>29</sup> Such cooperation is fostered by the shared authoritarian regime model and cultural ties. Türkiye enjoys a positive image in Central Asian societies, being the first most favored country in Kazakhstan and Kyrgyzstan and the second in Uzbekistan and Turkmenistan (after Russia).<sup>30</sup>

It has also become more important for the Central Asian states to expand relations, transport corridors, and trade toward both the Middle East and South Asia.

CA's engagement with Gulf states has grown in recent years, marked by the first Central Asia–Gulf Cooperation Council Summit in July 2023. The investments made by the Gulf states have increased significantly, particularly in Kazakhstan's and Uzbekistan's energy sector and renewables.<sup>31</sup> In 2023, Saudi Arabia became the third largest and UAE the fifth largest investor in Uzbekistan.<sup>32</sup> Moreover, Uzbekistan – based on its pragmatic approach toward the Taliban – and increasingly the other Central Asian states aim to enhance transport links through Afghanistan, Pakistan, and Iran for better access to the sea and thereby to international markets, including India whose interest in CA has risen too.<sup>33</sup>

Since the five Central Asian states can no longer rely (solely) on Russia's military protection, they are enhancing alternative security cooperations. Here, China is a key partner. CA's security cooperation with China that had already been built up before Russia's war on Ukraine widened, including cooperation related to weapons supplies,<sup>34</sup> military aid, military training and exercises, and increasingly information sharing and law enforcement.<sup>35</sup> Multilaterally, the Central Asian states – except Turkmenistan – cooperate with China within the Shanghai Cooperation Organization (SCO), where they focus on countering terrorism, separatism, and religious extremism, as well as on economic and energy security.<sup>36</sup> Security cooperation with Türkiye has also expanded since the start of the full-scale war. Kazakhstan and Uzbekistan signed agreements with Türkiye in 2022 and

27 Elizabeth Woods and Thomas Baker, "Iran in Central Asia – Future Obstacles for Chinese Economic Dominance in Kazakhstan, Kyrgyzstan, and Uzbekistan?", *Central Asia Barometer*, April 25, 2022: <https://ca-barometer.org/en/publications/iran-in-central-asia-future-obstacles-for-chinese-economic-dominance-in-kazakhstan-kyrgyzstan-and-uzbekistan> (accessed August 21, 2024).

28 In 2023, Türkiye was Uzbekistan's fourth largest trade partner, while placing fifth for Kazakhstan and sixth for Kyrgyzstan. See: Bureau of National Statistics, "Foreign trade turnover of the Republic of Kazakhstan (January–December 2023)"; European Commission, "European Union, Trade in Goods with Turkmenistan"; European Commission, "European Union, Trade in Goods with Tajikistan"; Genevieve Donnellon-May, "Turkey's Growing Influence in Central Asia," *The Diplomat*, October 13, 2022: <https://thediplomat.com/2022/10/turkeys-growing-influence-in-central-asia/>; National Statistical Committee of the Kyrgyz Republic, "Внешняя и взаимная торговля Кыргызской Республики товарами (бюллетень) [Foreign and Mutual Trade of the Kyrgyz Republic in Goods (Bulletin)]:" <https://stat.gov.kg/en/publications/vneshnyaya-i-vzaimnaya-torgovlya-tovarami-kyrgyzskoj-respubliki/> (all accessed August 22, 2024); Statistics Agency Uzbekistan, "Внешнеторговый оборот Республики Узбекистан" (see note 23); Statistics Agency, "Инвестиции в основной капитал" (see note 25).

29 Organization of Turkic States, "Declaration of the tenth summit of the Organization of Turkic States," November 3, 2023: [https://www.turkicstates.org/assets/pdf/temel\\_belgeler/tenth-summit-declaration-2023-21-en.pdf](https://www.turkicstates.org/assets/pdf/temel_belgeler/tenth-summit-declaration-2023-21-en.pdf) (accessed September 5, 2024).

30 Central Asia Barometer, "Public Perception of Turkey in Central Asia," June 2023: <https://ca-barometer.org/assets/files/froala/7c9df247afe316b054e56a538aa8810219ae584d.pdf> (accessed August 21, 2024).

31 Asna Wajid, "The diplomatic surge between the GCC and Central Asian states," International Institute for Strategic Studies, November 13, 2023: <https://www.iiss.org/de-DE/online-analysis/online-analysis/2023/11/the-diplomatic-surge-between-the-gcc-and-central-asian-states/> (accessed September 3, 2024).

32 Statistics Agency, "Инвестиции в основной капитал" (see note 25).

33 Sophia Nina Burna-Asefi, "After Temporary Suspension, What's Next for the Trans-Afghan Railway?", *The Diplomat*, February 17, 2023: <https://thediplomat.com/2023/02/after-temporary-suspension-whats-next-for-the-trans-afghan-railway/>; Nargiza Umarova, "How Does Central Asia Cooperate With Iran to Access World Markets?", *The Diplomat*, August 3, 2024: <https://thediplomat.com/2024/08/how-does-central-asia-cooperate-with-iran-to-access-world-markets/> (both accessed August 22, 2024).

34 Between 2015 and 2019, China accounted for 16 percent of all arms transfers to CA (rising from only 2 percent in 2010 to 2014), placing second after Russia (52 percent). See: Farkhod Aminjonov, "China's Security and Military Cooperation in Central Asia and its relevance to Europe," Konrad-Adenauer-Stiftung, June 29, 2022: [bit.ly/3ytofQB](https://bit.ly/3ytofQB) (accessed August 31, 2024).

35 Niva Yau, "China's Security Management Towards Central Asia," Foreign Policy Research Institute, April 2022: <https://www.fpri.org/wp-content/uploads/2022/04/chinas-security-management-towards-central-asia.pdf>; Joe Leahy, "Xi Jinping pushes Central Asian defence co-operation plan," *Financial Times*, May 19, 2023: <https://www.ft.com/content/4538f230-c782-40dd-ab7d-7304ac7099cd> (both accessed August 21, 2024).

36 Niva Yau, "China's Security Management Towards Central Asia" (see note 35).

2023, respectively, for enhanced military cooperation, including training, intelligence sharing, and defense industry collaboration.<sup>37</sup> In 2022, Ankara agreed to export drones to Turkmenistan and Kyrgyzstan, and signed a deal with Astana to jointly produce Turkish drones in Kazakhstan.<sup>38</sup>

The increased involvement of other players in CA – even in security affairs, and especially concerning China's strong role – has not led to conflict or competition between Russia and China but rather coexistence and coordination. Because its war has made Russia even more dependent on China, Moscow can hardly risk entering into conflict with Beijing over Central Asia.<sup>39</sup>

In summary, Russia's full-scale war has increased the need of the five Central Asian regimes to diversify their international partnerships to guarantee their security. Thus, the role of actors like China or Türkiye is widening and the multi-actor environment is getting more complex. Next to the players mentioned above, Europe is a key vector for the Central Asian regimes.

## GROWING YET LIMITED TIES TO THE EU

Central Asian states are targeting Europe in their diversification efforts in trade, technology, and investments, but they currently consider the EU to be just one key partner among several. Meanwhile, the EU shares CA's interest in diversification and reducing dependency on Russia; the region's strategic location

and resources – including fossil fuels, renewables, and critical raw materials – also make it attractive. Furthermore, the EU has an interest in regional security as well as enhancing Central Asian resilience and independence from powers like Russia and China.

Based on these mutual interests and building on the EU's 2019 Central Asia Strategy and Global Gateway Initiative, EU-CA relations have reached a new level since 2022, marked by more high-level meetings and agreements at both the EU and German level.<sup>40</sup> Among EU member states, Germany has taken a leading role. It has maintained diplomatic relations with all five countries since 1992 and was the first EU state to hold a summit with all five leaders in 2023. In September 2024, Chancellor Olaf Scholz traveled to the region for the first time where he held bilateral meetings and attended the second summit. In 2023, Kazakhstan was Germany's third-largest natural oil supplier. The Swedish-German company Svevind is currently implementing a major green hydrogen project there.<sup>41</sup> Germany is also seeking skilled labor migration from CA.<sup>42</sup> In addition, other EU members, particularly France and Italy, and other Western countries, particularly the United Kingdom and United States, have stepped up their engagement with the region.<sup>43</sup>

Trade relations have grown significantly. In 2022, EU27 goods imports from CA, especially crude oil, gas, and metals, rose by 67 percent. EU exports, especially machinery and transport equipment, increased by 77 percent.<sup>44</sup> In 2023, the EU27 was Kazakhstan's largest trading partner, accounting for 27.9 percent of its trade – ahead of Russia and China.<sup>45</sup> For Uzbekistan

37 Vusala Abbasova, "Kazakhstan, Türkiye Sign Military Cooperation Plan for 2024," *CaspianNews*, November 7, 2023: <https://caspiannews.com/news-detail/kazakhstan-turkiye-sign-military-cooperation-plan-for-2024-2023-11-7-4/>; *Gazeta.uz*, "О чём договорились оборонные ведомства Узбекистана и Турции [What the defense ministries of Uzbekistan and Turkey agreed on]," March 30, 2022: <https://www.gazeta.uz/ru/2022/03/30/turkey-mil/> (both accessed August 22, 2024).

38 Nurbek Bekmurzaev, "Kazakhstan and Turkey Make Steady Progress in Expanding Military Cooperation," *Eurasia Daily Monitor* 20, no. 192, December 20, 2023: <https://jamestown.org/program/kazakhstan-and-turkey-make-steady-progress-in-expanding-military-cooperation/>; Richard Outzen, "Security and Military Cooperation Among the Turkic States in the 2020s," *Central Asia-Caucasus Analyst*, December 8, 2023: [https://www.cacianalyst.org/resources/pdf/231208\\_FT\\_Outzen.pdf](https://www.cacianalyst.org/resources/pdf/231208_FT_Outzen.pdf) (both accessed August 22, 2024).

39 Temur Umarov and Alexander Gabuev, "Is Russia Losing Its Grip on Central Asia?" *Foreign Affairs*, June 30, 2023: <https://www.foreignaffairs.com/china/russia-losing-its-grip-central-asia> (accessed August 21, 2024).

40 E.g., the EU published a joint roadmap for strengthening the partnership in 2023, and it is preparing Enhanced Cooperation and Partnership Agreements with Kyrgyzstan, Uzbekistan, and Tajikistan. Strategic partnerships on critical raw materials have been concluded with Kazakhstan (2022) and Uzbekistan (2024).

41 Statista, "Anteile ausgewählter Länder an der deutschen Importmenge von Erdöl in den Jahren 2022 und 2023 [Shares of selected countries in the German import volume of crude oil in 2022 and 2023]," July 23, 2024: <https://tinyurl.com/2bb3k3ly> (accessed August 22, 2024).

42 During Chancellor Scholz's recent visit to Uzbekistan, a migration agreement was signed that aims to facilitate skilled labor migration. Federal Ministry of the Interior and Community, "Weiterer Meilenstein in der Migrationspolitik [Another milestone in migration policy]," September 15, 2024: <https://www.bmi.bund.de/SharedDocs/kurzmeldungen/DE/2024/09/migrationsabkommen-usbekistan.html> (accessed September 16, 2024).

43 French President Emmanuel Macron traveled to the region in November 2023, UK Foreign Secretary David Cameron visited in May 2024. The first summit between the US president and all five Central Asian leaders took place in September 2023.

44 European Commission, "Central Asia. EU trade relations with Central Asia. Facts, figures and latest developments": <https://tinyurl.com/2xtrs7sd> (accessed August 22, 2024).

45 European Commission, "European Union, Trade in Goods with Kazakhstan," May 16, 2024: [https://webgate.ec.europa.eu/isdb\\_results/factsheets/country/details\\_kazakhstan\\_en.pdf](https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_kazakhstan_en.pdf) (accessed August 22, 2024).

and Turkmenistan, the EU27 ranked third; for Tajikistan and Kyrgyzstan, fifth.<sup>46</sup> The increase is not exclusively positive, however. To some extent, it is also due to Central Asian re-exports to Russia. While the EU has imposed secondary sanctions on a few Central Asian companies, it primarily relies on holding dialogue with the states via the EU Special Envoy for Sanctions and the deterrent effect of secondary sanctions. Both have shown limited results.<sup>47</sup>

## The EU has yet to fully exploit the potential and leverage it has in CA

Collectively, the EU27 is the biggest foreign investor in CA, accounting for around 40 percent of all foreign direct investment in the region.<sup>48</sup> In January 2024, European and international financial institutions committed investments totaling €10 billion to expand the Trans-Caspian Transport Corridor (TCTC), which they plan to help develop into an alternative land corridor between China and Europe, bypassing Russia.<sup>49</sup> Yet, despite a 30 percent increase in container traffic via the TCTC in 2022, the prevailing lack of modern infrastructure and coordination among all actors involved make transport there expensive, risky, and therefore not competitive.<sup>50</sup> In addition to its economic activities in Central Asia, the EU has been implementing programs on border management, combating terrorism, and drug trafficking there for several years.<sup>51</sup>

Yet, despite the EU's growing engagement and being a key economic partner, its role in CA remains comparably minor. The EU does not play any major security role in the region, and its visibility on the ground is limited. Its engagement faces significant challenges, including the continued close ties of the five Central Asian states to Moscow and the growing role of other players who offer large investments swiftly and without democratic conditions. Furthermore, the lack of civil liberties and rule of law, as well as high corruption, limit economic cooperation with European actors and make investments risky and unattractive for them. Meanwhile, restrictive NGO legislation hampers civil society cooperation. Many of the agreed projects, such as the TCTC or energy and raw materials partnerships, have only produced limited results so far or have yet to be implemented.

## CONCLUSION AND RECOMMENDATIONS

Russia's full-scale war against Ukraine has significantly impacted the regional order in CA. It has reinforced existing trends, prompting the five Central Asian countries to reassess their dependencies on Russia and diversify their political, economic, and security partnerships. This has led to an even more complex and dynamic regional order.

The war has heightened the risks of over-dependence on Moscow, driving Central Asian states to seek greater independence while trying to benefit from Russia's international isolation – a challenging balancing act. For Russia, CA has gained in importance due to the loss of the Western market and a lack of partners. The Central Asian states are acting more confidently toward Russia and on the international stage.

While Russia's soft power is declining in Central Asian societies, the political regimes continue to learn from Russia's authoritarian practices to control society and secure their power, shrinking the space and options

46 European Commission, "European Union, Trade in Goods with Uzbekistan," May 16, 2024: [https://webgate.ec.europa.eu/isdb\\_results/factsheets/country/details\\_uzbekistan\\_en.pdf](https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_uzbekistan_en.pdf) (accessed August 22, 2024); European Commission, "European Union, Trade in Goods with Turkmenistan"; European Commission, "European Union, Trade in Goods with Tajikistan"; European Commission, "European Union, Trade in Goods with Kyrgyz Republic" (see note 23).

47 Catherine Putz, "EU Sanctions Envoy Strikes Positive Tone in Astana," *The Diplomat*, December 1, 2023: <https://thediplomat.com/2023/12/eu-sanctions-envoy-strikes-positive-tone-in-astana/> (accessed August 21, 2024).

48 European Commission, "Central Asia. EU trade relations with Central Asia" (see note 44).

49 European Commission, "Global Gateway: €10 billion commitment to invest in Trans Caspian Transport Corridor connecting Europe and Central Asia announced at Investors Forum," January 29, 2024: [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_24\\_501](https://ec.europa.eu/commission/presscorner/detail/en/ip_24_501) (accessed August 22, 2024).

50 The World Bank, "Middle Trade and Transport Corridor," November 2023: <https://thedocs.worldbank.org/en/doc/6248f697aed4be0f770d319dcaa4ca52-0080062023/original/Middle-Trade-and-Transport-Corridor-World-Bank-FINAL.pdf> (accessed August 22, 2024).

51 Border Management Programme in Central Asia: <https://www.bomca-eu.org/en/>; Law enforcement in Central Asia: <https://www.project-leica.eu/>; Central Asia Drug Action Programme: <https://www.eu-cadap.org/> (all accessed September 4, 2024).



for civil society throughout the region. In the future, growing divergence between the regimes and their societies could lead to growing instabilities.

The five Central Asian states are seeking to balance Russia's remaining role and guarantee their security and prosperity in two ways: by enhancing intra-regional cooperation and expanding international partnerships. Due to Russia's war, intra-regional collaboration has reached a new level, aiming to strengthen regional autonomy and resilience, yet regional integration continues to be limited. Moreover, the war has made Central Asia's multi-vector foreign policy more important. The region needs to foster growing engagements with multiple external powers, including the EU. Central Asian states are not only seeking to diversify their transport links, trade partners, and foreign investments, but also need new security partners due to Russia's changing role. China's strong engagement in the region – the key counterbalance to Russia's – has continued to grow, along with that of other actors, especially Türkiye and the Gulf states. Their attractiveness as partners for CA and their competitive advantages compared to the EU are based on geographical factors as well as their willingness to make extensive investments regardless of good governance standards.

The role that these actors will play in CA in the future largely depends on the outcome of the war for Russia and the political, economic, and military resources it will be able to make available. China could become even more important for the region, including in security affairs. However, there are also high reservations about over-dependence on Beijing. Central Asia's quest to diversify its relations will therefore continue and grow. Similarly, the region's future relations with Russia and Russia's capacities will influence the development of intra-regional cooperation and the level that genuine integration can attain.

Despite the EU's growing engagement with CA, its role there remains comparably limited. The EU has yet to fully exploit the potential and leverage it has due to its significant economic power. Therefore, the EU needs to adjust its Central Asia policy. The EU and Germany need to:

- **Make a strong and lasting political commitment to the region**, including improving coordination among all actors involved, to advance partnerships with all five Central Asian states and compete with other players;
- More closely **link cooperation fields** and **enhance conditionality** to adequately respond to domestic developments and use their economic power strategically to leverage economic liberalization, rule of law, good governance, and space for civil society – essential elements for advancing EU–Central Asian cooperation;
- Step up their support for Central Asian initiatives to strengthen **intra-regional cooperation**;
- More strongly focus on **security**, a must in the new geopolitical environment, by adapting and expanding current EU programs;
- Expand their efforts to **engage with civil societies** – especially given the limitations placed on civil society exchange by the regimes – by offering more educational exchange programs and German language courses, as well as facilitating the visa application process to promote people-to-people contacts and skilled labor migration to Europe;
- Develop a **coherent, long-term strategy** for engaging (or not engaging) with key regional players like Russia, China, and Türkiye; and
- Better coordinate their **regional policies**, especially toward CA, the EU's Eastern Neighborhood, and the Black Sea region to address the interconnected challenges presented by Russia's changing role.



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Due to its war against Ukraine, Russia has lost its role as regional hegemon in Eastern Europe, the South Caucasus, Central Asia, and its impact in the Western Balkans. Moscow not only has to bargain with states in these regions for influence but also with other powers such as China, Turkey, and Iran. Emerging regional powers and authoritarian governance challenge the EU's influence, creating insecurity, transactional relations, and the absence of any functioning order.

**The DGAP series “Changing Regional Orders”** examines how Russia's war against Ukraine is reshaping regional orders in the mentioned regions, exploring key regional trends and Russia's changing interests. The series discusses how the EU should adapt to the changing dynamics and their impact on its enlargement and neighborhood policies.