Report

Between Giants

Central Asia Balancing China, Russia, and the Rest

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Cover page photo: The Registan square in downtown Samarkand, Uzbekistan, on 13 September 2022, during a summit of the Shanghai Cooperation Organisation. Alexander Nemenov / AFP / Scanpix.

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List of Abbreviations

BOMCA	Border Management Programme in Central Asia
BRI	Belt and Road Initiative
C+C5	China + Central Asian countries format
CACO	Central Asian Cooperation Organisation
CENTCOM	Central Command (the US)
CIS	Commonwealth of Independent States
CKU	China-Kyrgyzstan-Uzbekistan railway
CM	Consultative Meetings of the Central Asian Presidents
CRRF	Collective Rapid Reaction Force
CSTO	Collective Security Treaty Organisation
EAEU	Eurasian Economic Union
EBRD	European Bank for Reconstruction and Development
EEAS	European External Action Service
ETIM	Eastern Turkistan Islamic Movement
EV	electric vehicle
FDI	foreign direct investment
FSB	Federal Security Service (Russia)
GCC	Gulf Cooperation Council
GCI	Global Civilisation Initiative
GDI	Global Development Initiative
GDPR	General Data Protection Regulation
GRU	Main Directorate of the General Staff of the Armed Forces (Russia)
GSI	Global Security Initiative
ISKP	Islamic State Khurasan Province
NGO	non-government organisation
NPP	nuclear power plant
OTS	Organisation of Turkic States
PAP	People's Armed Police
PLA	People's Liberation Army
RATS	Regional Anti-Terrorist Structure
SCO	Shanghai Cooperation Organisation
UAV	unmanned aerial vehicle
XUAR	Xinjiang Uyghur Autonomous Region

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Executive Summary

While maintaining traditional ties with Russia, Central Asian states have seen China's growing economic and security footprint, as well as the increasing role of other powers – or 'the rest' – such as the EU, the US, Türkiye, India, Pakistan, Iran, and the Gulf states.

China has become the leading economic actor in the region – not only in trade but also in critical areas such as physical and digital infrastructure. Connectivity projects like the China–Kyrgyzstan–Uzbekistan railway indicate a shifting balance, as China pushes forward initiatives previously blocked by Moscow.

Despite China's rise, Russia's influence remains significant in remittances, education, media, and language. While these may wane over time, China is unlikely to replace Russia's soft power in the short term. Beijing's role as a provider of modern infrastructure gives it influence among elites, while Chinese consumer products shape public perceptions – positively or negatively, as seen in Kazakhstan's anti-China protests in 2016.

In the security domain, although Russia remains the dominant actor in military-to-military interactions, China has gradually expanded its presence, particularly in border security activities near Afghanistan and counterterrorism efforts contributing to the political stability of Central Asian regimes. Initially, China promoted security cooperation with Central Asian states through the Shanghai Cooperation Organisation (SCO), which includes Russia, but increasingly does so through bilateral mechanisms as well as the China + Central Asian countries (C+C5) format that excludes Russia. Central Asia has become a testing ground for many of China's global undertakings, including the Global Security Initiative (GSI).

Russia's effort to reassert its role as the regional security provider has been weakened by its war in Ukraine and the pragmatic engagement of many Central Asian states with the Taliban. Nevertheless, Moscow-led Collective Security Treaty Organisation (CSTO) members – Kazakhstan, Kyrgyzstan, and Tajikistan – continue to procure Russian equipment and conduct multilateral and bilateral military exercises with Russia. Moscow is concerned about growing Chinese influence in the region, but the political necessity to maintain good relations with Beijing keeps rivalry muted.

China is thus eroding Russia's 'sphere of influence' in Central Asia. Yet it would be misleading to view this trend simply as China gradually replacing Russia in the region. Instead, Central Asian countries are increasingly pursuing multi-vector foreign policies and leveraging overlapping spheres of influence – those of China, Russia, and 'the rest' – to maximise their own agency and strategic autonomy. This is evident in their deepening ties not only with Beijing and Moscow but also with a diverse range of external actors and even the Taliban-led government in Afghanistan.

The EU and Central Asian states inaugurated the EU-Central Asia Summit in April 2025 in Samarkand, upgrading relations to a strategic partnership as well as committing to cooperate for peace, security, and democracy. In the evolving global and regional geopolitical landscape, the EU has an opportunity to build mutually beneficial partnerships and contribute meaningfully to Central Asia's resilience, prosperity, and regional integration.

One key area is support for regional cooperation. The revival of C5+ dialogue formats and the growth of intra-regional forums like the Consultative Meetings of Central Asian Presidents signal shared aspirations for further intra-regional integration. The EU should support these efforts to bolster Central Asia's strategic autonomy in an increasingly contested geopolitical landscape.

Despite large investment pledges (e.g., €12 billion under the Global Gateway), the EU's presence often remains less visible than that of actors like Türkiye, whose targeted investments and soft

power have yielded outsized influence. The EU can learn from this approach and enhance its visibility by using EU contractors and focusing on people-to-people ties.

Education is another strategic opportunity. EU universities and Erasmus+ are highly valued, and more EU member states should join the programme to meet growing regional demand. Supporting student exchanges and academic partnerships helps promote democratic values through lived experience rather than abstract advocacy.

In economic reform, the EU can assist countries like Uzbekistan, particularly in liberalising and modernising sectors such as energy. Conditional credit and technical support can advance both competitiveness and governance.

The EU also acts as a soft security provider, notably through the Border Management Programme in Central Asia (BOMCA), promoting best practices in border management and rule of law – contrasting with China's and Russia's securitised approaches.

Lastly, cooperation on Afghanistan is essential. Kazakhstan's pragmatic engagement with the Taliban highlights the need for EU–Central Asia coordination to promote regional stability and inclusive governance in Afghanistan.

Introduction

While China expands its influence over Central Asia and Russia works to maintain its own regional power, Beijing and Moscow appear to have coordinated their roles. China dominates the economic sphere while Russia reigns supreme in Central Asia's military and security domain. This 'division of labour' limits western influence and manages their competition without undermining the anti-western strategic alignment between Zhongnanhai and the Kremlin.[1] However, Russia's full-scale invasion of Ukraine, the following western-led sanctions on Russia, and the resulting rise of the Central Asian Middle Corridor as an alternative to Russia's Northern Corridor, may tip this delicate balance between Beijing and Moscow. Even before 2022, some analysts had noted that the Sino-Russian division of labour in Central Asia was eroding.[2]

While Russia remains preoccupied with the war in Ukraine, China is quietly rendering Putin's Eurasian integration project in Central Asia nominal and ineffective

While Russia remains preoccupied with the war in Ukraine, China is quietly rendering Putin's Eurasian integration project in Central Asia nominal and ineffective. In May 2023, Beijing inaugurated the China-Central Asia Summit in Xi'an – a city symbolically marking the eastern end of the Silk Road.[3] The second summit of the format, which does not include Russia, was held in Astana in June 2025. Nevertheless, all Central Asian presidents have in recent years continued travelling to Moscow to attend the 9 May Victory Day Parade, signalling enduring ties with Russia.[4]

A major shift is unfolding in the economic and connectivity landscape. China has grown to become the largest single-country trade partner for and investor in Central Asia. The region's strategic importance to Beijing is demonstrated by China's 2013 launch of the Belt and Road Initiative (BRI) in Central Asia – Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan have all joined the initiative. Already by 2019, 261 projects with Chinese participation were being implemented in Central Asia, through the BRI or bilateral initiatives.[5] China's role in Central Asian physical connectivity has grown, as has the importance of the Middle Corridor, a trade route connecting China to Europe via Central Asia, the South Caucasus, and Türkiye. Russia's illegal war, which is causing reorientation away from its Northern Corridor, and unreliable maritime trade globally have caused many players to turn their attention to the Middle Corridor. China is a key player on this route, and in December 2024, it began construction of yet another project in the corridor. The China-Kyrgyzstan-Uzbekistan railway, a route bypassing Russia, will better connect China to Central Asia and Europe, and potentially South Asia via Afghanistan in the future.

An increased Chinese presence is also notable in the areas of digital con-nectivity, people-to-people exchanges, and energy. Chinese companies like Huawei, Hikvision, and Dahua dominate much of Central Asia's telecommunications and surveillance hardware markets. However, Russia is a key player in many regional digital platforms, notably the Yandex ecosystem,

[1] Zhongnanhai [中南海], a heavily guarded compound in Beijing, is the headquarters of the Chinese Communist Party and the State Council, representing the core of China's political power. Zhongnanhai and the Kremlin are symbolic power centres in their respective countries.

[2] Kristiina Silvan, *Russian Policy towards Central Asia 30 Years after the Collapse of the Soviet Union: Sphere of Influence Shrinking?* (Finnish Institute of International Affairs, 2021), 7.

[3] Adina Masalbekova, "How China Is Leveraging Security Cooperation in Central Asia," *United States Institute of Peace*, 9 September 2024.

[4] "All 5 Central Asian Leaders to Attend Victory Day Parade in Moscow," *Radio Free Europe/Radio Liberty*, 7 May 2024.

[5] Albina Muratbekova, "Fresh Impulse of the BRI Projects in Central Asia," *Eurasian Research Institute*, 2019.

while homegrown alternatives like Kazakhstan's Kaspi payments are also important. In people-to-people exchanges, China's network of Central Asian Confucius Institutes and new Luban Workshops complement other educational initiatives, like Central Asian students studying in China. Although this number is growing, it remains far lower than the number of Central Asian students in Russia – an important post-Soviet advantage maintained by Moscow. In renewable energy, large-scale hydropower and smaller-scale solar projects, often financed and built by China, are set to decrease the energy reliance of Central Asian states on Russia.

Another significant geopolitical shift is emerging in the security domain, with China potentially assuming a more prominent role in regional security. Following the US withdrawal from Afghanistan in 2021, Central Asian states initially sought enhanced Russian security support, fearing the spillover effects of instability and radicalism from the new Taliban regime. However, with the exception of Dushanbe, Central Asian governments have adopted a more pragmatic approach, gradually normalising relations with Kabul and exploring bilateral and regional trade and connectivity initiatives with the Taliban, previously designated as a terrorist organisation.

In light of ongoing changes, Central Asian states – Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan – have reassessed their strategic positions, reshaping both the geoeconomic and security dynamics of the region. They may increasingly consider themselves as "nobody's backyard" and are overcoming historical interethnic-interstate rivalries among themselves – formerly a hindrance to regional integration.[6]

This report examines two primary areas of potential cooperation and friction between China and Russia in Central Asia: first, trade and connectivity; second, security and counterterrorism. Developments of the past decade show a shifting Sino-Russian dynamic in both spheres. Economically, China has already surpassed Russia to become the region's key player, yet Moscow's role remains important. Beijing's physical intrusion into Russia's Central Asian "1 520 mm zone" of connectivity and Chinese companies' leadership in regional technology hardware provision point to the marginalisation of Russia's influence in certain spheres, but not entirely. Geoeconomic changes are occurring, but a new equilibrium is yet to be reached. Likewise, a shift in the regional security architecture, albeit moving more slowly, is underway.

China shows growing potential to replace Russia as Central Asia's primary security provider

China shows growing potential to replace Russia as Central Asia's primary security provider, evidenced by the rise of Russia-exclusionary security meetings, the growing presence of the Global Security Initiative (GSI, 全球安全倡议) and other China-led formats, as well as growing bilateral security ties between China and the five Central Asian countries. Changes in both spheres will have far-reaching implications for regional geopolitics.

The report integrates findings of Sino-Russian cooperation and contention in the two domains of trade and connectivity, and security and counterterrorism, considering strategic implications for China, Russia, Central Asian states, the EU, and other key stakeholders in the coming years. Drawing on this analysis, it explores what role the European Union can play in Central Asian trade, connectivity, security, and counterterrorism.

Considering the agency of Central Asian states and their intra-regional diversity, this report avoids overly generalising the region and instead adopts select case studies to provide deeper analytical insights. To address geoeconomic developments, the report focuses on China's three most important regional trade and connectivity partners:

[6] Jennifer B. Murtazashvili and Temur Umarov, "Nobody's Backyard: A Confident Central Asia," *Carnegie Endowment for International Peace*, 5 September 2024; Niels Drost et al, *Central Asia Emerging from the Shadows European Union – Central Asia Relations in Evolving Eurasian Geopolitics* (Netherlands Institute of International Relations 'Clingendael,' 2025).

- **Kazakhstan** accounts for half of China's trade with Central Asia and was the country chosen by Xi Jinping to launch the BRI in 2013. It plays an important role in facilitating China-Russia trade.

- **Kyrgyzstan** and **Uzbekistan** are China's second and third largest trade partners in the region, key to its regional connectivity goals, including the new China-Kyrgyzstan-Uzbekistan railway, as well as important re-export hubs between China and Russia.

In addressing security and counterterrorism perspectives, the report primarily focuses on Kazakhstan and Tajikistan, which face contrasting external security concerns – namely, Russia's imperialistic policies and instability in Afghanistan, respectively – while situating the remaining three states within broader trends of the region:

- **Kazakhstan** shares a 7 600 km-long border with Russia; Moscow and Astana are officially allied through the CSTO. However, Astana remains wary of repeated Russian nationalist claims over its northern, Russian-speaking regions.

- **Tajikistan**'s primary security concerns stem from instability in Afghanistan and terrorist threats, along with border conflicts with its neighbour, Kyrgyzstan. Tajikistan hosts both Russia's largest military base (the 201st Military Base) and a China-funded military facility near the Afghan border.

The study is based on extensive literature reviews and open-source investigations, complemented by interviews with local experts. In April 2025, the authors visited Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan.[7]

All four countries are characterised by authoritarian rule, marked by the suppression or elimination of political opposition, limited media freedom, and disregard for human rights.[8] In 2024, Central Asia Barometer, a regional opinion polling NGO, was forced to suspend its activities in Kyrgyzstan, once considered Central Asia's "island of democracy."[9] In Tajikistan, an independent journalist was charged with treason, reportedly in connection with an opinion survey she conducted on China's influence on the country.[10] In light of the potential risks and biases associated with autocratic environments, in some countries, the authors refrained from interviewing local journalists or experts, opting instead to speak with foreign diplomats.[11]

1. Trade and Connectivity

China is Central Asia's largest trade partner, accounting for a third of the region's trade. While the EU is Central Asia's largest source of foreign direct investment (FDI), it is often Chinese firms, under the BRI and GDI frameworks, building out connectivity and energy projects on the ground. The EU and Russia remain important geoeconomic players as Central Asia's second and third largest trade partners, respectively, while the latter specialises in traditional areas of cooperation like nuclear as well as new areas, including digital platforms. Russia's outsized role in the income of Kyrgyz, Tajik, and Uzbek income via remittances increases its economic leverage over the region. Other actors like Türkiye, India, and Iran play a growing regional role, while the second Trump administration has devoted little attention to Central Asia, aside from imposing the standard 10% reciprocal tariffs on Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan, and a higher 27% on

[7] The authors express gratitude to Aziz Burkhanov, Ikboljon Qoraboyev, Jessica Neafie, Berikbol Dukeyev, Karoblis Raimundas, Jasna Lambert, Naoko Nishikawa, Makoto Nakatani, Vladimirs Zaguzovs, Albina Muratbekova, Assylzat Karabayeva, Emilbek Dzhuraev, Yuliy Yusupov, Farkhod Tolipov.

[8] Freedom House's Global freedom statuses (x/100) indicate the following: Kazakhstan: 23, Kyrgyzstan: 27, Tajikistan: 5, Turkmenistan: 2, Uzbekistan: 12, Russia: 13, and China: 9. "Explore the Map," Freedom House, accessed 27 February 2025.

[9] Kasiet Ysmanova, "CAB Statement on Temporary Suspension of Operations," *Central Asia Barometer*, 16 September 2024.

[10] "'Real Journalism Is Dying' -- Tajikistan's War On Independent Media," *Radio Free Europe/Radio Liberty* (Tajikistan), 4 February 2025.

[11] Neil Collins et al, "Challenges for Political Science Research Ethics in Autocracies: A Case Study of Central Asia," *Political Studies Review* 22, no. 2 (2024): 330–46.

Kazakhstan as part of Liberation Day tariffs.[12] China's strong geo-economic presence in Central Asia enables the building up of its "China-Central Asia Community of Shared Future" (中国 – 中亚命运共同体), part of Beijing's wider "Neighbourhood Community of Shared Future (周边命运共同体)", of which Central Asia along, with Indochina, form the two major clusters (两大集群).[13]

1.1. Trade and Investment: China Leads

Today, China is Central Asia's largest trading partner, accounting for 33% ($89 bn) of Central Asia's $272.2 bn trade turnover.[14] The EU and Russia account for 24% ($65 bn) and 16% ($44 bn), respectively.[15] China's share of proportional trade turnover has eaten into those of both European countries' and Russia's, which in 1998 held 29% and 28% of the total.[16] The BRI has facilitated bilateral trade and investment relations between China and Central Asian states since 2013, focusing on "hard" development like infrastructure and energy projects. Meanwhile, China's Global Development Initiative (GDI, 全球发展倡议), launched in 2021, works on 'soft' projects, such as poverty alleviation and food security, through multilateral institutions like the UN and SCO.

Chinese and Russian products are viewed as complementary rather than competitive

Perhaps unexpectedly, in the eyes of locals, Chinese and Russian products are viewed as complementary rather than competitive, perceivably belonging to separate categories; Chinese goods compete with Japanese and South Korean products, while Russian goods compete with Belarusian or even Estonian. This is explained by the real difference in the import origin of different goods, with consumer electronics hailing from East Asia and daily consumer products coming from CIS countries. In certain categories, like electric vehicles (EV), there is almost no competition for Chinese brands in Central Asia. In 2024, Chinese carmakers sold over 300 000 cars to Kazakhstan, Kyrgyzstan, and Uzbekistan,[17] while Russia's largest automaker, AvtoVAZ, which produces Lada, exported just 20 000 units abroad, with the figure to Central Asia making up a part of that.[18] With the Tajik capital Dushanbe set to completely shift to electric cabs by September 2025, the market is ripe for Chinese EV companies that face little regional competition.[19]

Competition between Chinese and Russian goods can occur in select categories, like furniture, with Central Asia's choice of import source being affected by Chinese domestic policy. Prior to 2015, China was the primary source for Kazakh furniture imports, but when Xinjiang Uyghur Autonomous Region (XUAR) heavily tightened provincial trade restrictions owing to security concerns, Sino-Kazakh cross-border trade was impacted, and Kazakhstan turned to Russia and Belarus as an alternative import source. In late 2021, many XUAR trade restrictions were loosened following the change of provincial party secretary, and Kazakh trading companies began once again importing Chinese furniture via XUAR, facilitated by a new logistics centre in Urumqi. This shows that Chinese and Russian goods do compete in certain categories and that importers are flexible to switch between sources depending on the domestic policies of their neighbours. Heavy machinery, trucks,

[12] "Here's The Full List Of Trump's Reciprocal Tariffs Announced Wednesday," *Forbes,* 2 April 2025.

[13] "周边命运共同体构建与亚太地区秩序重塑 [Building a Community of Shared Future for Neighboring Countries and Reshaping the Asia-Pacific Regional Order]," *China's Diplomacy in the New Era*, 7 May 2025.

[14] "Trade, economic cooperation between China, Central Asian countries on fast lane: analyst," *Global Times*, 20 May 2024; "OEC Trade Country Ranking 2023," Observatory of Economic Complexity, 2024. In 2023, Kazakhstan's trade turnover was $160 bn, Kyrgyzstan's $21.8 bn, Tajikistan's $8 bn, Turkmenistan's $20 bn, Uzbekistan's $62.4 bn. This gives a total of $272.2 bn.

[15] European Council, "EU-Central Asia trade," 15 April 2025. $65 bn calculated from €59 bn at exchange rate of €1=$1.1 @ EOY 2023. "Trade volume between Russia and Central Asia increases amid Western sanctions," *Daryo.uz*, 23 May 2024.

[16] Katja Geršak, "Central Asia in the Middle of Russian and Chinese Tensions," Lennart Meri Conference, 2021.

[17] Yu Cong and Ding Yi, "Chinese Carmakers Expand Into Growing Central Asian Markets," *Global Neighbours*, 25 February 2025.

[18] "'Автоваз" планирует в 2025 году нарастить экспорт до более 30 тыс. автомобилей [AvtoVAZ plans to increase exports to over 30,000 vehicles in 2025]," *TASS*, 28 April 2025.

[19] "Tajik capital plans to completely shift to electric taxi cabs until September 2025v," Central Asia Climate Portal, 17 April 2025.

building materials, and fertilisers are products in Chinese and Russian export categories with potential overlap in Central Asia.

The EU is Central Asia's largest investor (as a bloc), providing over 40% of FDI to the region over the past ten years, worth $110 bn.[20]

The presence of Chinese investments on the ground in Central Asia is tangible

While the European Council estimates total Chinese and Russian investment in Central Asia to make up only 10% of FDI in the region, Russian sources state that in Central Asia, Chinese cumulative investment has reached $63.9 bn, and Russian $23.9 bn, putting their combined FDI total not far behind the EU.[21] Indeed, the presence of Chinese investments on the ground in Central Asia is tangible with projects such as the Astana Light Rail Transit, the China-Kyrgyzstan-Uzbekistan railway, Tajikistan's Dushanbe-Chanak Road, and the Turkmenistan-China gas pipeline, to name just a few.

Russia and Türkiye often have greater visibility on the ground than the EU

Counterintuitively, Russia and Türkiye, who inject far less FDI into Central Asia than the EU, often have greater visibility on the ground. One reason for this is that the EU often finances projects, for example, via the European Bank for Reconstruction and Development (EBRD), which are then built by non-European (often Chinese) companies. In the case of the Zhanatas wind farm in Kazakhstan and the Tashkent Solar PV and Battery Energy Storage System in Uzbekistan, EBRD financing is combined with Chinese and Saudi construction firms for implementation.[22] So, while the EBRD invested a record $2.35 bn in Central Asia in 2024, physical projects built by EU contractors are proportionally few and far between.[23] Türkiye's noticeable presence, while investing far less, comes from a targeted sectoral approach. Examples of Ankara's engagement with Central Asian healthcare specifically include financing and maintaining a hospital in northern Kazakhstan's Kokshetau, the Kyrgyz-Turkish Friendship hospital in Bishkek, and sending Turkish experts to Uzbekistan to assist in reforming the country's healthcare.[24]

EU investments in Central Asia's energy sector, especially renewables, may be overshadowed by the fact that several Central Asian energy companies are majority-owned by Chinese and Russian firms, like Tajikistan's state energy company Barki Tojik or Tajikistan's second-largest hydroelectric power plant Sangtuda HPP1, controlled in part by Russia.[25] China-built renewable energy projects in Central Asia include the Zhanatas and Shelek wind farms in southern Kazakhstan. Additionally, Chinese firms have made $4 bn of FDI into photovoltaic plants in Uzbekistan: in the Kashkadarya, Bukhara, Samarkand, Jizzakh, and Tashkent regions.[26]

Continued Russian investment in Central Asian nuclear energy has enabled Russia to maintain influence in the sector, in the face of Chinese and EU competition. In May 2024, President Mirziyoyev and Putin agreed to construct a new nuclear power plant (NPP), in an opaque and secretive deal, despite Uzbekistan having enough renewable energy potential to satisfy its energy needs.[27] Russia's nuclear strength

[20] European Council, "EU-Central Asia trade," 15 April 2025. $110 bn calculated from €100 bn at exchange rate of €1=$1.1 @ EOY 2023.

[21] "China's Activity in Central Asia in Light of Russian Interests," *Russia in Global Affairs*, 1 April 2025.

[22] Christoph Nedopil Wang, "China Belt and Road Initiative (BRI) Investment Report 2023," Green Finance & Development Centre (Fudan University), 5 February 2024; Anton Usov, "EBRD finances the largest battery energy storage system in Central Asia," *EBRD*, 2 July 2024.

[23] "EBRD invests record 2.26 bln euros in Central Asia in 2024," *Xinhua*, 21 January 2025.

[24] "Kazakhstan secures $394m financing package for Kokshetau hospital project," *Healthcase Asia Magazine*, 6 November 2024; "Kyrgyz-Turkish Friendship Hospital in Bishkek named after Turkish President Recep Tayyip Erdogan," *Kazinform*, 6 September 2024; "Turkish experts assist in reforming Uzbekistan's healthcare system," *UzDaily*, 27 November 2024.

[25] Alevtina Solovyeva, Alina Oprelianska, Betti Marie Peterson et al, *Russia's and China's Influence in Central Asia: Europe's Prospects, Concerns and Search for Balance* (Centre for Oriental Studies, University of Tartu, March 2025).

[26] Yunis Sharifli, "Green New Wave: How China Adapts to Central Asia's Renewable Energy Landscape," *Carnegie*, 19 April 2024.

[27] Farkhod Tolipov, "Nuclear Power Plant in Uzbekistan: Energy and Geopolitics," *CACI Analyst*, 21 August 2024.

is also evident in Kazakhstan, with the 2025 selection of Rosatom to lead an international consortium to build Kazakhstan's new NPP. The chairman of the Atomic Energy Agency for Kazakhstan stated in the announcement that a separate nuclear energy agreement was planned with the PRC, expressing the wish to use Chinese technologies to build another NPP in Kazakhstan in the future.[28] While the December 2024 Russia-to-China sale of Central Asian uranium deposits caused some speculation about Russia's continued role in Central Asian nuclear energy, Rosatom's renewed investments in Kazakh and Uzbek plants suggest that little has changed.[29]

Economic cooperation between China and Central Asian countries, while all-encompassing, often lacks transparency. Between China and Kyrgyzstan, for example, cooperation exchanges exist at all levels and departments, including energy cooperation in electricity and coal, as well as cooperation in trans-portation, agriculture, e-commerce, production capacity, green development, education, medical care, tourism, and border infrastructure.[30] In August 2023, Kyrgyzstan signed 29 project cooperation agreements with China at a contract value of approximately $1 bn, many of which were followed by rapid implementation.[31] As of 2023, Chinese companies had established nearly 700 fully-owned or joint ventures in Kyrgyzstan, covering mineral resource development, oil and gas processing, transportation infrastructure construction, energy and electricity, building materials, agriculture, and other fields.[32] Major deals are announced on a near-monthly basis between China and Kyrgyzstan, showing China's economic indispensability despite shady deal aspects, including undisclosed project costs, interest rates, debts, and other key financial metrics. The economic indispensability of China is true for all Central Asian countries to varying degrees, while the EU and Russia are effectively secondary actors.[33]

The economic indispensability of China is true for all Central Asian countries, while the EU and Russia are secondary actors

Economic cooperation between China and Central Asian countries, while all-encompassing, often lacks transparency

1.2. China Dominates New Physical Connectivity

From cross-border railways to national highways to intra-city public transport, no other player, including Russia, is able or willing to match China in building new Central Asian physical connectivity infrastructure. Projects such as the China-Kyrgyzstan-Uzbekistan (CKU) railway, Kyrgyzstan's North-South highway, and Astana's Light Rail Transit are testament to Chinese dominance.[34] Combined, China's numerous connectivity projects are changing regional geopolitics by re-orienting the axis of Central Asian connectivity – while the ancient Silk Road ran through Central Asia on the east-west axis, the Tsarist and Soviet eras saw Central Asian connectivity oriented to the north-south vector, facilitating the transport of raw materials from Central

No other player is able or willing to match China in building new Central Asian physical connectivity infrastructure

[28] "Kazakhstan selects Rosatom for first nuclear power plant," *World Nuclear News*, 16 June 2025.

[29] "Russia sells stakes in some Kazakh uranium deposits to China," *Reuters*, 17 December 2024.

[30] "马兴瑞艾尔肯·吐尼亚孜会见吉尔吉斯斯坦总理阿·扎帕罗夫 [Ma Xingrui and Erken Tuniyazi met with Kyrgyz Prime Minister A. Japarov]," 伊利哈萨克自治州人民政府 [People's Government of Yili Kazakh Autonomous Prefecture], 17 August 2023.

[31] "中国（新疆）－吉尔吉斯斯坦商贸推介会在乌鲁木齐举行 [China (Xinjiang)-Kyrgyzstan Trade Promotion Conference held in Urumqi]," 伊利哈萨克自治州人民政府 [People's Government of Yili Kazakh Autonomous Prefecture], 20 August 2023.

[32] "发挥新疆独特优势 深化中吉合作内涵－－访中国驻吉尔吉斯斯坦大使杜德文 [Leveraging Xinjiang's unique advantages to deepen China-Kyrgyzstan cooperation: An interview with Chinese Ambassador to Kyrgyzstan Du Dewen]," 中国一带一路网 [China BRI Network], 22 September 2023.

[33] Except in the case of Kazakhstan, as EU-Kazakhstan trade turnover is larger than China-Kazakhstan trade turnover.

[34] "Kyrgyzstan: Building new pathways of connectivity with China," *CGTN*, 7 June 2025.

Asia to Russia.[35] While the Russia-promoted International North-South Transport Corridor aims to maintain the Russia-established north-south flow of goods, several China-led projects over the past two decades, including the CKU railway and numerous trans-Kazakh routes, are once again encouraging transport to flow from east to west. Moscow is aware of the geopolitical ramifications of rising east-west Middle Corridor routes, which bypass Russia – a leaked Russian government report from April 2024 indicates that Moscow aims to reassert itself at the centre of a Eurasian trade bloc to rival not only the US and the EU but also China.[36]

Moscow is aware of the geopolitical ramifications of rising east-west Middle Corridor routes, which bypass Russia

Construction of the CKU railway, a $4.7-8 bn project beginning in late 2024, is likely a sign of Beijing's new assertiveness and Moscow's weakening grip on Central Asia. The railway – which China has been a proponent of for three decades, and which Russia continuously blocked for all that time – finally got the Kremlin's (tacit) nod of approval following Russia's full-scale invasion of Ukraine.[37] The railway's geopolitical significance stems from its route, which circumvents Russia, providing XUAR with another passage of direct access to Central Asia. Notably, the railway will enter Russia's 1 520 mm space with China's 1 435 standard mm gauge – the gauge change will occur in Makmal, Kyrgyzstan. China was not only able to get the railway itself approved but also to extract the concession of entering Russia's 1 520 mm space. Yet, Russia, despite being busy with Ukraine, maintained enough leverage to prevent China from building the whole line in 1 435 mm.

For Bishkek, the CKU railway should bring economic development along the line, open the country to international business and provide future transit fees, overall putting Kyrgyzstan on the map. Nonetheless, Bishkek assumes high risk with the project, given that the Kyrgyz section is the most expensive, future transit demand remains uncertain, and the possibility of corruption hampering progress. For Tashkent, the project is relatively low risk – only a small section of the CKU railway passes into Uzbekistan, meaning low cost. Yet the line has high potential as a future route connecting China and Afghanistan, positioning Uzbekistan as a transit hub between China, Russia, and South Asia, which is important, given Uzbekistan and Turkmenistan's competition to develop a trans-Afghan transport corridor. Moscow supports both the Uzbek and Turkmen-Kazakh trans-Afghan railway projects as part of its efforts to secure faster access to the South Asian market for fossil fuel exports as a North-South transport corridor. This ambition was highlighted during Secretary of the Security Council Sergei Shoigu's visit to Kabul in November 2024.[38]

China is perceived by Central Asian leaders as the best choice to facilitate modernisation projects

Chinese connectivity investments allow Central Asian leaders to portray themselves as modernisers, tightening their ties with Beijing. While in the past, security provision was enough to maintain legitimacy, citizens today expect modernisation from Central Asian governments. Overwhelmingly, China is perceived by Central Asian leaders as the best choice to facilitate modernisation projects, given Chinese companies' cost advantage.[39] In this way, continued Chinese investment means ruling legitimacy and will be important in maintaining strong ties between Central Asia's elites and Zhongnanhai.

[35] Shigeru Otsuka, "Central Asia's Rail Network and the Eurasian Land Bridge," *Japan Railway & Transport Review* No. 28 (September 2001): 42–49.

[36] Max Seddon and Chris Cook, "Russia's Fears over Ex-Soviet Nations Laid Bare in Leaked Paper," *Financial Times*, 10 February 2025.

[37] "俄罗斯点头，谈了27年的中吉乌铁路，能开建了！[Russia nodded in approval, and the China-Kyrgyzstan-Uzbekistan railway, which has been discussed for 27 years, can now be built!]," *163.com*, 22 June 2024.

[38] Nargiza Umarova, "Russia Seeks to Extend Transport Routes to Afghanistan," *Jamestown Foundation*, 16 January 2025.

[39] There are some exceptions to only Chinese companies participating in Central Asian infrastructure development. Spanish company Talgo has provided multiple trains to Uzbekistan's high-speed rail, Afrosiyob. "Uzbekistan to receive 4 more Talgo electric trains," *Kun.uz*, 29 June 2023.

1.3. Digital Connectivity: A Contested Field

Central Asian digital connectivity on the ground was noticeably mixed – in Almaty, one might use a Xiaomi phone to order a Yandex Go taxi on Huawei's 5G network, navigating on Yandex Maps, while paying the driver with Kaspi.

Digital infrastructure is, likewise, split by category. Chinese physical hardware powers digital connectivity: 5G infrastructure, surveillance equipment, and scanners. Russian digital platforms dominate the lives of users – Yandex Go and Yandex Maps for mobility and navigation, Wildberries and OZON for shopping. Meanwhile, 'homegrown' options are preferred for payments such as Kaspi in Kazakhstan and M-Bank in Kyrgyzstan, although these options are founded and developed by entrepreneurs and engineers from other CIS countries.[40]

In 2025, China is the most important player in digital connectivity hardware, thanks largely to Huawei and other Chinese companies. Beijing began its push in this direction in the early 2000s – Huawei launched its "connect all villages" (村村通) programme in 2007 to connect rural areas of Kazakhstan to the internet. In 2013, Dushanbe's Safe City project launch saw the installation of 870 Huawei surveillance cameras and Huawei training over 50 employees of the Tajik Ministry of Internal Affairs to operate the system, all financed by a $21 mn loan from the Export-Import Bank of China.[41] In 2019, Huawei took a step to further surveillance operations in Uzbekistan, closing a $1 bn deal with the Uzbek government.[42] By 2023, Huawei had partnered with most key telecom operators in Uzbekistan: Uztelecom, Unitel, Ucell, Perfectum Mobile, and East Telecom.[43]

The same year, Huawei was already serving close to nine million Tajik local wireless users, dominating the market.[44] Huawei's ICT academy in Turkmenistan trains young Turkmen professionals; Huawei's training courses are incorporated into local universities, and Huawei plans to establish an educational technology centre.[45] In 2025, Huawei base stations will enable the launch of 5G in Turkmenistan via the country's TürkmenÄlem 52°E satellite in the Arkadag smart city near the capital Ashgabat.[46] Huawei's primacy in Central Asia is backed up by other complementary Chinese companies, such as Hikvision and Dahua, which provide other surveillance technologies and equipment. While the Russian "System for Operative-Investigative Activities" electronic surveillance technology for intercepting telephone and internet traffic has reportedly been exported to autocratic regimes in Central Asia, later attempts of Russian companies in the surveillance space, such as Vega Systems, have tried and failed to compete with Chinese alternatives.[47] For now, China continues to dominate the regional market for 'smart city' and other surveillance technologies, expanding the presence of the Digital Silk Road.[48]

Russian companies in the surveillance space have tried and failed to compete with Chinese alternatives

The reverse is true for digital platforms, where Russian companies tend to outperform Chinese competitors in Central Asia. In major cities, such as Astana, Almaty, Bishkek and Tashkent, Yandex Go is the most widely used

[40] Mikheil Lomtadze is a Georgian-Kazakhstani technology entrepreneur and businessman. He is co-founder and Chairman of the board of Kazakhstan-based fintech Kaspi.

[41] Edward Lemon and Ruslan Norov, "How China is Adapting to Tajikistan's Demand for Security Cooperation," *Carnegie*, 20 March 2025.

[42] Yau Tsz Yan, "Smart Cities or Surveillance? Huawei in Central Asia," *The Diplomat*, 7 August 2019.

[43] Berikbol Dukeyev, Dilfuza Mirzakhmedova, and Madina Tursonova, "Huawei's Growing Presence in Central Asia's Telecom Industry," *The Diplomat*, 23 December 2023.

[44] "Ван Шуньли: «Компания Huawei стремится к долгосрочному содействию устойчивому развитию Таджикистана» [Wang Shunli: 'Huawei is committed to promoting the long-term sustainable development of Tajikistan]," *Khovar*, 20 May 2023.

[45] "Huawei offers Turkmenistan innovative solutions for digitalization of education," *News Central Asia*, 23 September 2024.

[46] "The city of Arkadag is preparing to launch the first 5G network in Turkmenistan," *Turkmen Portal*, 24 February 2025.

[47] Peter Bourgelais, *Commonwealth of Surveillance States: On the Export and Resale of Russian Surveillance Technology to Post-Soviet Central Asia* (Access Now, 2013); Albina Muratbekova, *Digital Surveillance Solutions in Central Asian States* (Eurasian Research Institute, 2020).

[48] Dylan Welch, *Russia and China in Central Asia's Technology Stack s* (German Marshall Fund of the United States, 2025), 12.

ride-hailing application. Yandex Maps, Yandex Eats food delivery, and Yandex Go e-scooters form part of a larger mobility ecosystem in major Central Asian cities. China's DiDi taxi tried to enter the Kazakh market but left after a few years, having been priced out by Yandex. For online shopping in these cities, Russia's Wildberries and Ozon are the most popular e-commerce platforms, having the advantage over competitors of a built-out delivery infrastructure. Yandex Maps shows Wildberries having 1 710 collection locations in Tashkent, while Ozon has just over 100. In Almaty, Wildberries and Ozon have around 200 locations each. Chinese companies, such as Aliexpress, Temu, Shein, and Pinduoduo, are popular in certain Central Asian cities like Almaty but lack logistical infrastructure similar to Russian companies, instead opting to partner with local delivery companies like QazPost in Kazakhstan. Importantly, Russian and Chinese e-commerce do not necessarily compete with each other, and can even work together. This is especially true in Kyrgyzstan and, to a lesser degree, in Uzbekistan, where middlemen buy goods from Chinese e-commerce platforms and sell them to Russian ones, sometimes directly and sometimes with value addition to the product before re-export. So, Russian and Chinese e-commerce platforms can exhibit both competition and synergy.

Data regulation, an important feature of digital connectivity between markets, is a contested space between the EU and China in Central Asia. In Kazakhstan, a gradual move towards the EU's General Data Protection Regulation (GDPR) has been noted. From 2020, Kazakh companies have to appoint a person responsible for organising personal data, similar to the EU's data protection officer, introduced in 2018.[49] While data privacy legislation similar to the EU's has been adopted, there are also moves to deepen cooperation with China. In June 2022, the "China + Five Central Asian Countries Data Security Cooperation Initiative" was signed at the 3rd C+C5 foreign ministers meeting in Kazakhstan. As part of the agreement, the parties pledged to "collaborate and take coordinated actions to address challenges and threats to global information security and ensure data security."[50] The agreement functions as a localised Central Asian iteration of China's Data Security Cooperation Initiative.[51] The Shanghai Academy of Social Sciences notes that the digital rules in Central Asia are not yet unified, stating that geopolitical competition will affect how Central Asian countries choose digital economic partners. The academy recommends that China continue to strengthen cooperation with Central Asian countries in digital rules.[52] Digital regulation, an area where Russia itself is learning from China's internet model, is likely not one where Russia will be a serious competitor to China.

Data regulation is a contested space between the EU and China in Central Asia

Russian and Chinese e-commerce platforms can exhibit both competition and synergy

1.4. People-to-People Exchanges: Russia Still Ahead

Historically, Russia has dominated people-to-people exchanges with Central Asia. Today, Russia continues to have strong exchanges with the region, while China has made noticeable gains. Russia, nonetheless, maintains a strong lead over China in Central Asian students studying at their local universities, and the same is even more the case for migrant workers. Despite some outflow of Central Asian migrant workers from Russia following the full-scale invasion and the Crocus City Hall attack, millions remain.

[49] "Kazakhstan strengthens personal data protection by gradually moving toward GDPR standards," *Dentons*, 28 January 2021.

[50] "'中国+中亚五国' 数据安全合作倡议 ['China + Five Central Asian Countries' Data Security Cooperation Initiative]," 中华人民共和国中央人民政府 [PRC Central People's Government], 9 June 2022.

[51] Assylzat Karabayeva, *China-Central Asia Regionalization and Its Impact on the Central Asian Region and Beyond* (KIMEP University, 2025).

[52] "数字合作成 '中国+中亚五国' 外长会亮点，中国携手中亚共建数字丝绸之路 [Digital cooperation becomes the highlight of the 'China + Five Central Asian Countries' Foreign Ministers' Meeting, and China joins hands with Central Asia to build a Digital Silk Road]," *Shanghai Academy of Social Sciences*, 30 August 2022.

Country	China	Russia
Kazakhstan	15 000	67 000
Kyrgyzstan	4 000	8 800
Tajikistan	3 500	33 000
Turkmenistan	2 000	23 000
Uzbekistan	8 000	53 400

Table 1. Number of Central Asian students studying in China and Russia, 2023. *Source:* Russia in Global Affairs.[53]

The number of Central Asian students in Russia remains high, although the number in China is also increasing. According to Russian statistics, 185 200 Central Asian students were studying in Russia in 2023, compared to 32 500 in China, meaning approximately six times more in Russia than in China. But China has significantly increased university cooperation with Central Asia since Russia's full-scale invasion. As of 2024, there were 13 Confucius Institutes in Central Asia, of which five were in Kazakhstan, four in Kyrgyzstan, two in Tajikistan, and two in Uzbekistan.[54] While Turkmenistan does not host a Confucius Institute, it houses the Chinese Centre for Language Education and Cooperation, which, like Confucius Institutes, is funded by China's Ministry of Education.[55] Kyrgyzstan's four Confucius Institutes, providing Chinese-language education for thousands of Kyrgyz students, are partnered with Xinjiang University and Xinjiang Normal University under the BRI framework,[56] a part of Beijing's wider strategy to leverage the geographical advantage (发挥区位优势) of XUAR in forming partnerships with Central Asia.[57] Other Central Asian Confucius Institutes often partner with cities in western China, such as Lanzhou and Xi'an, reinforcing a shared Silk Road identity. Local experts stated that Uzbek students increasingly look toward Chinese universities over western ones, especially as Chinese institutions rise in QS university rankings. Student exchanges between Uzbekistan and China are facilitated by the Confucius Institutes as well as the Shanghai Cooperation Organisation Centre for Public Diplomacy in the country.[58]

Chinese universities have grown increasingly active, showing greater interest in obtaining substantive cooperation results

Before the pandemic, European universities were more cooperative than Chinese ones in Central Asia, but since the end of the pandemic, Chinese universities have grown increasingly active, showing greater interest in obtaining substantive cooperation results. KIMEP University in Almaty has expanded from partnerships with five Chinese universities to 30, including Tsinghua in 2022. In August 2023, a delegation from the Chinese Academy of Sciences visited Nazarbayev University; the same year, China's Northwestern Polytechnical University in Xi'an opened a branch at Al-Farabi Kazakh National University.[59] In 2025, China's University of Political Science and Law inked a memorandum of understanding with Kazakhstan's judicial institutions, and it is also exploring cooperation mechanisms with institutions in Tajikistan and Uzbekistan.[60]

Migrant workers are an important factor in people-to-people exchanges, and Russia surpasses China in this by far. As of 2025, there are around 4 million citizens of Central Asian

[53] Ivan Yu. Zuenko, "China's Activity in Central Asia in Light of Russian Interests," *Russia in Global Affairs,* np. 2 (1 April 2025). Compiled by Russia in Global Affairs using data from Trotsky et al. (2024), Embassy of Kazakhstan (2023), CABAR (2023), Anhor.uz (2024), Aslonova (2024). *Note:* while Chinese statistics include only students studying at universities, Russian statistics include young people who come to Russia to study in other educational institutions, including vocational and technical schools as well."

[54] Albina Muratbekova, "Expanding China's Education Diplomacy in Central Asia," *Eurasian Research Institute*, February 2024.

[55] "Turkmenistan and China increase cooperation in the field of education," *Turkmenistan Golden Age*, 5 January 2024.

[56] "发挥新疆独特优势 深化中吉合作内涵－－访中国驻吉尔吉斯斯坦大使杜德文 [Leveraging Xinjiang's unique advantages to deepen China-Kyrgyzstan cooperation: An interview with Chinese Ambassador to Kyrgyzstan Du Dewen]," 中国一带一路网 [China BRI Network], 22 September 2023.

[57] Karuna Nandkumar, "Diplomacy at the Periphery: How the PRC's Border Provinces Shape Neighborhood Engagement", *National Bureau of Asian Research*, 6 August 2025.

[58] "SCO Center for Public Diplomacy opens in Tashkent," *Kun.uz*, 29 January 2019.

[59] Chan Young Bang and Sungju Park-Kang, "China's BRI, Kazakhstan, and KIMEP University: The Second Central Asia-China Summit," *The Geopolitics*, 5 June 2025.

[60] "Chinese university signs cooperation MoU with Kazakhstan's judicial institutions," Belt and Road Portal, 27 May 2025.

countries living in Russia, as well as approximately 670 000 staying illegally.[61] Kyrgyz, Tajiks, and Uzbeks make up the majority of migrant workers. Russia's full-scale invasion may have reduced overall numbers: for example, Uzbek migrant workers from 3 million before 2022 to approximately 1.5 million after 2022. In contrast, the number of Turkmen migrant workers in Russia has remained somewhat constant.[62] Factors for leaving include growing xenophobia among Russian authorities and Russian civil society, forced recruitment for Russia's illegal war, and currency fluctuations as the rouble is pushed and pulled by sanctions and oil prices. A steady number of Turkmen workers may be associated with other outside factors, such as Turkish immigration policy, with Türkiye being another destination for Turkmen migrant workers. Migrant workers continue to play an important role in many Central Asian economies, with remittances accounting for around 40% of GDP in Tajikistan and 20% in Kyrgyzstan and Uzbekistan.[63] This means that if Russia wished to cause civil unrest in these countries, it could do so by closing its doors to migrant workers.[64] So, while China has gained leverage over all Central Asian leaders as the provider of modernisation required for their ruling legitimacy, Russia, via migrant worker remittances, maintains leverage over critical parts of at least three Central Asian states' GDP.

Russia, via migrant worker remittances, maintains leverage over critical parts of at least three Central Asian states' GDP

Many Central Asian countries are adopting laws which require the increased use of local languages in government, as well as educating a growing number of children in their own languages.[65] Some are unhappy with the status of Russian in their countries and have even engaged in cancel campaigns and boycotts against organisations that have failed to serve in local languages, like the Magnum supermarket chain in Kazakhstan.[66] While efforts are being made to increase local language use, there is still a long way to go – the Russian language continues to play a significant role in Central Asian societies and governments. During a two-week visit to the region, we met few locals who did not speak Russian, and many addressed us directly in Russian. In Astana, we observed that university students often talked in Russian amongst each other, walking between the classrooms of their English-speaking universities, and on the train, an ethnic Kazakh mother spoke to her son in Russian – however, this varies significantly domestically, with many regions using Kazakh more than Russian. Nevertheless, Kazakh government meetings continue to allow the use of Russian, and in Uzbekistan, the government may request embassies and delegations to submit formal documents in Russian, even when documents are provided in both Uzbek and English. President Mirziyoyev is said to travel with an interpreter who translates for him between English and Russian.

While efforts are being made to increase local language use, the Russian language continues to play a significant role in Central Asian societies and governments

Chinese is spoken by far fewer people and is limited to those who have studied in China or worked with Chinese companies. Kazakh locals are not interested in learning Chinese due to the perception of tough working hours at Chinese companies, and also due to the fact that ethnic Kazakhs coming from Xinjiang,

[61] "Essential but Unwelcome: Central Asian Migrants in Russia," *The Times of Central Asia,* 18 April 2025.

[62] "Turkmen labour migrants turning elsewhere as Turkey is less welcoming," *IntelliNews*, 21 May 2025.

[63] Galiya Ibragimova, "Why Are Central Asian Migrant Workers Spurning Russia?," *Carnegie*, 1 August 2024.

[64] Farangis Najibullah, "Central Asian Leaders Groom Their Offspring As Successors With Moscow Meetings," *Radio Free Europe*, 9 June 2025.

[65] "Kyrgyz Parliament Developing a Russian-Kyrgyz Legislative Dictionary," *Times of Central Asia*, 21 March 2024.

[66] Yesengul Kapkyzy, "Магнумга бойкот: Клиенттен мемлекеттік тілде сөйлеуді талап ету орынды ма? [Boycott of Magnum: Is it appropriate to require clients to speak the state language?]," *Minber.kz*, 10 April 2025.

speaking both Chinese and Kazakh, are able to satiate most roles which require Chinese. Whether Beijing's investments into cultural and education programmes in Central Asia will bear fruit at scale remains to be seen – if they are to succeed, it will take long-term investment and engagement.

1.5. Sentiment: The Challenge for Both

Central Asian countries had long-standing positive sentiment towards Russia, which has begun to decline following the full-scale invasion. In northern Kazakhstan, ethnic Russian Kazakh citizens are increasingly differentiating their identity from the Russians who live across the border. But the prominence of the Russian language in Central Asia, especially in big cities, means that Russian-language media, including Russian state-sponsored outlets, and Russian narratives continue to play an important role in shaping public opinion, even in the wake of Russia's full-scale invasion.

Russian-language media and Russian narratives continue to play an important role in shaping public opinion

Attitudes towards China are complex and affected by historical anti-Chinese sentiment, such as in the Kyrgyz epic "Manas," anti-Chinese Soviet rhetoric, and modern anti-Chinese sentiment stemming from rapidly expanding economic relations with China. Yet mostly positive economic relations with China have also led to positive views, in the end creating a situation where all Central Asian states have a number of "Sinophiles" and "Sinophobes." Negative views, besides historical narratives, are driven by rhetoric around China buying up Central Asian land, debt trap diplomacy, and the increasing number of Chinese citizens coming to all countries, especially since the implementation of Chinese visa-free travel arrangements with Kazakhstan and Uzbekistan. Public opinion toward China is affected by each country's media, with language playing a factor in perceptions. Kazakh-language media in Kazakhstan is often more critical of China than local Russian-language media. Anti-China protests have erupted across Kazakhstan on numerous occasions, including in 2016 and 2021.[67] An emerging field of study in China, the concept of "peripheral communication" (周边传播), aims to control China-related discourse in border countries – anti-China sentiment in Kazakhstan will likely be one of its key focuses.[68]

From the perspective of Central Asian governments, there is an overall warming of relations with China and a cautious distancing of relations with Russia, notably in the cases of Kazakhstan and Kyrgyzstan. In Kazakhstan, the presidential rhetoric used regarding Russia has changed – former President Nursultan Nazarbayev used to call Russia a "blood brother" and stopped doing so in 2014 with Russia's invasion of Crimea. President Kassym-Jomart Tokayev formerly regularly mentioned the Eurasian Economic Union (EAEU) and the CSTO in his speeches, but this decreased after 2022. Kyrgyzstan has been careful to adopt language laws that encourage the use of Kyrgyz while maintaining Russian's "special status," eliciting praise from Putin.[69] On the other hand, Xi said that China and Kazakhstan were brothers during the first China-Central Asia summit in 2023.[70] At the second China-Central Asia summit in 2025, Mirziyoyev called Xi Jinping a "dear brother," reflecting warming rhetoric on both sides.[71]

There is an overall warming of relations with China and a cautious distancing of relations with Russia

[67] "Anti-China Protests Staged Across Kazakhstan; At Least 20 Detained," *Radio Free Europe,* 27 March 2021.

[68] Andrew Grant, "Expanding China's Geopolitical Influence through Peripheral Communication", *National Bureau of Asian Research*, 13 August 2025.

[69] "Putin Praises Kyrgyzstan for 'Special Status' of Russian Language," *The Moscow Times*, 2 July 2025.

[70] "Си Цзиньпин провел переговоры с президентом Казахстана Касым-Жомартом Токаевым [Xi Jinping held talks with Kazakh President Kassym-Jomart Tokayev]," Ministry of Foreign Affairs of the People's Republic of China (PRC MFA), 17 May 2023.

[71] "Вдоль древнего Шелкового пути, Си Цзиньпин налаживает новые связи с Центральной Азией [Along the ancient Silk Road, Xi Jinping is forging new ties with Central Asia]," *Xinhua Novosti*, 13 June 2025.

	Population	Active military (reserve)	Internal & border troops	GDP (USD)	Defence Budget (USD)
Kazakhstan	20.26 mn	39 000	31 500	307 bn	2.55 bn
Kyrgyzstan	6.17 mn	10 900	9 500	17 bn	unavailable
Tajikistan	10.39 mn	8 800 (20 000)	7 500	13 bn (2024)	176 mn (2024)
Turkmenistan	5.74 mn	36 500	20 000	91 bn	unavailable
Uzbekistan	36.52 mn	48 000	20 000	127 bn	unavailable

Table 2. Armed Forces of Central Asian States. *Source:* The Military Balance 2025.[73]

Public sentiment toward Russia is divided in Central Asia, sometimes along generational and ethnic lines. Kazakh surveys show that only 15% explicitly support Russia's war and 20% back Ukraine, while the majority is neutral. However, over a quarter of the country considers a Russian attack on Kazakhstan a possibility, showing a growing anxiety.[72] Negative sentiments towards Russia were echoed by most taxi drivers the authors spoke to on their visit, many of whom had previously worked in Russia, expressing not only disdain for Russia's war but also anti-migrant worker Russian xenophobia, especially following the Crocus City Hall attack in 2024.

2. Security and Counterterrorism

Central Asia has been viewed by Moscow as a hotbed of radical Islamism, which – along with the instability in Afghanistan – could jeopardise Russia's national security, and has thus been used to justify Russia's military presence in the region. In addition, the spread of 'colour revolutions' in Central Asia, such as the 2005 Tulip Revolution in Kyrgyzstan that forced President Askar Akayev to flee to Russia, has been a significant source of concern for Moscow due to possible spillover effects within Russia itself. Similarly, the region has been important for China's national security and political stability, as Kazakhstan, Kyrgyzstan, and Tajikistan share borders with China's Xinjiang region, where Beijing regards Uyghur separatism – particularly the Eastern Turkistan Islamic Movement (ETIM) – as a major threat.

Central Asia has been viewed by Moscow as a hotbed of radical Islamism and has thus been used to justify Russia's military presence

2.1. Multilateral Security Frameworks Led by Russia and China

Russia has served as a security guarantor for Kazakhstan, Kyrgyzstan, and Tajikistan through the CSTO, established in 2002. It maintains key military installations such as the Kant Air Base in Kyrgyzstan, the 201st Military Base (former 201st Motorised Rifle Division) in Tajikistan, and the Baikonur Cosmodrome in Kazakhstan. In 2009, the CSTO members created the Collective Rapid Reaction Force (CRRF) to enhance the alliance's ability to respond to external aggression, fight terrorism and drug trafficking, and perform disaster relief work. Although the CRRF has conducted joint military exercises, it was not deployed during the 2020 Second Nagorno-Karabakh War or the 2021-22 Tajikistan-Kyrgyzstan border clashes due to a combination of factors, including the CSTO's limited effectiveness, Russia's strategic interests, and the complex nature of the disputes.

In 2018, then Russian Security Council Chief Nikolai Patrushev warned that more than 2 000 militants from the Islamic State Khorasan Province (ISKP) were preparing to use northern Afghanistan as a bridgehead for incursions into Central Asia via Tajikistan and Turkmenistan. Though not CSTO members, Turkmenistan and Uzbekistan reportedly resumed joint military

[72] "Central Asia's Sovereignty in the Shadow of the War in Ukraine," *Times of Central Asia*, 26 May 2025.

[73] International Institute for Strategic Studies, *The Military Balance 2025* (Routledge, 2025).

training with Russia around the same time.[74] Following the Taliban's takeover of Kabul in 2021, Central Asian states initially sought increased security engagement from Russia.

China began engaging Central Asian countries – albeit to varying degrees – on regional security issues through the SCO

China, meanwhile, began engaging Central Asian countries – albeit to varying degrees – on regional security issues through the SCO, a multilateral framework that also includes Russia. The SCO originated as the "Shanghai Five" (comprising China, Kazakhstan, Kyrgyzstan, Russia, and Tajikistan) in 1996, initially focusing on resolving border disputes. It was renamed the SCO after Uzbekistan joined in 2001 and has since evolved into a forum addressing Eurasian economic, political, and counterterrorism agendas.

The SCO's Regional Anti-Terrorist Structure (RATS) reflects China's focus on combating the "Three Evil Forces" (三股势力) – terrorism, extremism, and separatism – which aligns closely with Central Asian leaders' top priority:

China's focus on combating terrorism, extremism, and separatism aligns closely with Central Asian leaders' top priority: maintaining the political stability of their ruling regimes

maintaining the political stability of their ruling regimes.[75] In the late 1990s and 2000s, Central Asian countries experienced multiple terrorist attacks stemming from Islamic extremism and domestic policy failures, while their authoritarian leaders positioned themselves as guarantors of stability and concentrated power by suppressing both Islamic movements and dissenting voices within society.[76]

Nevertheless, Chinese experts acknowledge that while the CSTO's CRRF can conduct operations, the SCO's RATS does not possess comparable operational forces. They also note that the CSTO not only conducts exercises and implements joint operations but also provides military equipment and resources to member states – capabilities beyond the SCO's reach. In this context, although the CSTO's membership in Central Asia is limited to three countries, Beijing views the Russia-led CSTO as an important contributor to the regional security and stability, which are indispensable for advancing China's BRI in Central Asia.[77]

Beijing views the Russia-led CSTO as an important contributor to the regional security and stability

In 2017, Russia supported India's accession to the SCO, likely to counterbalance China's growing influence, while China backed the inclusion of Pakistan, India's regional rival. Although the entry of these South Asian powers may have complicated China's dominance in the organisation, by that time, Beijing had already established strong bilateral ties with each of the Central Asian states.[78]

Beijing skilfully combines the SCO's multilateral framework with bilateral cooperation with each state. Between 2002 and 2020, China conducted 12 bilateral joint security exercises with Central Asian states, especially with Kyrgyzstan and Tajikistan, often targeting threats from the ETIM. China's Ministry of Public Security also provided training for at least 1 000 Central Asian security officers over the past two decades, covering counterterrorism and anti-drug trafficking operations. Beijing further donated vehicles, equipment, and

[74] "Российские военные возобновили совместную подготовку с военнослужащими Туркменистана [Russian military resumes joint training with Turkmenistan servicemen]," *Azathabar*, 26 December 2018.

[75] Edward Lemon et al, "Stability Maintenance and the 'Three Evils': Framing China's Role in Central Asia," *Journal of Contemporary China* (May 2024): 1–27.

[76] Aleksey Malashenko, *The Fight for Influence: Russia in Central Asia* (Carnegie Endowment for International Peace, 2013).

[77] Li Xing 李兴 and Niu Yichen 牛义臣, 独联体集体安全条约组织能否保护丝绸之路经济带建设-中国社会科学院俄罗斯东欧中亚研究网 [Can the Collective Security Treaty Organisation of the CIS Protect the Construction of the Silk Road Economic Belt?] (中国俄欧亚研究网, 2016).

[78] Derek Grossman, *China Will Regret India's Entry Into the SCO* (RAND Corporation, 2017).

infrastructure, including housing for military personnel and police stations.[79]

At the inaugural China-Central Asia Summit in 2023, President Xi Jinping emphasised mutual support for sovereignty, independence, security, and territorial integrity while opposing external interference – invoking 'colour revolutions,' a term long associated with Russia's concerns about western meddling in the region.[80] In September 2024, under the GSI, Beijing hosted the first meeting of Public Security and Interior Ministers with Central Asian states – without Russian participation.[81]

2.2. Russia, both Ally and Security Concern for Kazakhstan

While Kazakhstan remains central to Russia's integration efforts through the CSTO and the EAEU, alongside Belarus, it has also grown increasingly cautious of Moscow's asymmetric influence. As early as 2013, President Nursultan Nazarbayev voiced opposition to any EAEU political functions that might compromise the independence of member states.[82]

In the 2000s, Russia's potential claims on the Russian-dominated northern regions of Kazakhstan were largely dismissed as the "imagination of Alexander Solzhenitsyn," a former Soviet dissident and prominent Russian writer who raised the issue of "Russian" regions of Ukraine and Kazakhstan.[83] However, concerns were reignited in 2014 when President Putin questioned Kazakhstan's statehood, raising fears of Russia's imperial ambitions akin to those seen in Ukraine's Crimea and Donbas.[84] Against the backdrop of increasingly sabre-rattling nationalist rhetoric from Russian officials toward Astana, some analysts interpreted Xi Jinping's statement affirming Kazakhstan's territorial integrity during his visit to Astana in September 2022 as a subtle warning to Moscow.[85]

During the January 2022 unrest, at the request of President Tokayev, Moscow-led CSTO forces were symbolically deployed to Kazakhstan. However, the intervention was not designed to suppress the unrest but rather to demonstrate solidarity with Tokayev's regime through the presence of troops. The CSTO forces did not fire a single shot and withdrew from the country two weeks later. Despite initial concerns, the Russia-led interventions did not have substantial impacts on Astana's multi-vector foreign policy.[86] Since Russia's full-scale invasion of Ukraine, President Tokayev has distanced himself from Russia – most notably by publicly refusing to recognise the so-called "Donetsk/Lugansk People's Republics" during the St Petersburg International Economic Forum in June – whereas Kazakhstan continued to host the CSTO command-staff exercise "Interaction-2022" and special trainings such as "Search-2022" and "Echelon-2022."

The Russia-led interventions did not have substantial impacts on Astana's multi-vector foreign policy

Kazakhstan remains China's most important partner in Central Asia. Beijing elevated its relations with Astana to a comprehensive strategic partnership as early as 2011, followed by the other four states (Uzbekistan in 2016, Tajikistan in 2017, Kyrgyzstan in 2018, and Turkmenistan in 2023). Xi's first international

[79] Niva Yau, *China's Security Management towards Central Asia* (Foreign Policy Research Institute, 2022), 22–29.

[80] Masalbekova, "How China Is Leveraging Security Cooperation in Central Asia."

[81] "中国－中亚公安内务部长会晤机制首次会议举行 王小洪出席并作主旨发言 [The first meeting of the China-Central Asia Public Security and Internal Affairs Ministers' Meeting Mechanism was held. Wang Xiaohong attended and delivered a keynote speech]," 中华人民共和国中央人民政府 PRC Central People's Government], 10 September 2024.

[82] John C.K. Daly, "Kazakhstan and Belarus: Buyer's Remorse?," in S Frederick Starr et al (ed), *Putin's Grand Strategy: The Eurasian Union and Its Discontents* (Central Asia-Caucasus Institute & Silk Road Studies Program, 2014), 88.

[83] Malashenko, *The Fight for Influence*.

[84] Anna Dolgov, "Kazakhs Worried After Putin Questions History of Country's Independence," *The Moscow Times*, 1 September 2014.

[85] Zharmukhamed Zardykhan, "Kazakhstan Responds To Recent 'Territorial Claims'," *Eurasian Institute*, accessed on 1 July 2025; Joanna Lillis, "China Warns against Meddling in Kazakhstan Ahead of Putin Meeting," *Eurasianet*, 14 September 2022.

[86] Sanshiro Hosaka, "Moscow-Backed Tokayev's Coup Against Nazarbayev?," *ICDS*, 20 January 2022; Alexander Libman and Igor Davidzon, "How to Intervene Symbolically: The CSTO in Kazakhstan," *Chatham House*, 30 November 2022.

visit after the pandemic was to Kazakhstan. This high-level bilateral relationship allowed Kazakhstan to acquire from China advanced military equipment, such as Wing Loong-1 strike drones (2016) and Y-8F-200 military transport aircraft (2017).[87]

The first SCO counterterrorism drill in 2002 took place in Kazakhstan, simulating a plane hijacking and incursions into Xinjiang.[88] Chinese concerns over Uyghur diaspora activism in Central Asia – such as the Committee for Eastern Turkistan and the United National Revolutionary Front of East Turkistan based in Kazakhstan – led to a subsequent bilateral drill simulating an attack on a border checkpoint in Xinjiang. This exercise involved information sharing and coordination, with China deploying border guards and anti-terrorism special forces under the Ministry of Public Security.[89] Another known China-Kazakhstan bilateral exercise was conducted in 2019 in Oskemen, eastern Kazakhstan.[90] During Xi Jinping's visit to Astana in June 2025, he emphasised the comprehensive security cooperation between the two countries, which includes expanding law enforcement and defence exchanges, as well as joint efforts to combat "Three Evil Forces."[91]

Although Kazakhstan continues to procure Russian military hardware, Astana has embarked on expanding its defence industry through joint ventures with Türkiye, South Africa, and European states

Although Kazakhstan continues to procure Russian military hardware – and Russia maintains missile testing grounds in the country, such as Sary Shagan, Astana has embarked on expanding its defence industry through joint ventures with Türkiye (ASELSAN for defence electronics), South Africa (Paramount Group for armoured vehicles), and European states (Airbus for helicopters and satellites).[92] Recent contracts include UAV manufacturing with companies from China, Israel, and Türkiye.[93]

Following President Islam Karimov's death in 2016, Uzbekistan, under Shavkat Mirziyoyev, has promoted regional cooperation, including in security. Astana and Tashkent signed a Treaty of Allied Relations in December 2022, overcoming a long-standing rivalry within the region. Since 2021, the two countries have held joint military exercises.[94] In 2024, they held an operational-tactical command and staff exercise "Ashyk Aspan-2024" with the participation of military personnel of the air force and air defence specialists.[95] Notably, in July 2024, Kazakhstan hosted the Birlestik-2024 exercise, involving 4 000 personnel and 700 units of equipment from Azerbaijan, Kyrgyzstan, Tajikistan, and Uzbekistan. The exercise took place at the Oymasha training ground by the Caspian Sea, focusing on interoperability of the armed forces of members of the Organisation of Turkic States (OTS) and Tajikistan – without participation from Russia and China. The drill focused on joint operations, including ground and air reconnaissance, naval special forces, artillery, assault and tank units, aviation, and naval vessels.[96] In terms of the number of troops involved, the scale of this exercise was comparable to Russia-led CSTO drills and exceeded China-led SCO exercises.[97] Also, Kazakhstan's Ministry of Defence announced bilateral

[87] Jeremy Page and Paul Sonne, "Unable to Buy U.S. Military Drones, Allies Place Orders With China," *The Wall Street Journal*, 17 July 2017; "Казахстан закупил китайские транспортники Y-8F-200WA [Kazakhstan has purchased Chinese Y-8F-200WA transport aircraft]," *Voyennoye Obozreniye*, 18 June 2018.

[88] Yau, *China's Security Management towards Central Asia*, 16.

[89] Yau, *China's Security Management towards Central Asia*, 25.

[90] Yau, *China's Security Management towards Central Asia*, 27.

[91] The State Council (The Republic of China), "China, Kazakhstan to Boost Ties for Regional, Global Peace, Development," 17 June 2025.

[92] International Institute for Strategic Studies, *The Military Balance 2025*, 155.

[93] International Institute for Strategic Studies, *The Military Balance 2025*, 166.

[94] Saniya Sakenova, "Strengthening Central Asia: Kazakh-Uzbek Military Cooperation Grows," *The Astana Times*, 1 April 2025.

[95] Ministry of Defence of the Republic of Kazakhstan [@modgovkz], "Kazakhstan and Uzbekistan held a joint exercise to protect airspace," Twitter, 13 September 2024.

[96] Nigar Bayramli, "Military Exercise of Turkic Nations Held in Kazakhstan Ends," *Caspian News*, 18 July 2024.

[97] Average number of troops involved in Russia-led CIS and CSTO and China-led SCO exercises is around 4 467, and 1 844, respectively. Edward Lemon and Bradley Jardine, *Central Asia's Multi-Vector Defense Diplomacy*, 68, Kennan Cable (Wilson Center, 2021), 3.

drills with Türkiye ("Qabylan Zholy-2024"). A leaked Russian government document highlights Moscow's concerns about Central Asian countries' growing engagement with the OTS.[98]

While some Central Asian countries remain formally aligned with Russia through institutions such as the CIS, EAEU, and CSTO, Russia sees that their foreign policy preferences do not agree with its own

While some Central Asian countries remain formally aligned with Russia through institutions such as the CIS, EAEU, and CSTO, Russia increasingly sees that the foreign policy preferences of these countries often do not agree with its own. However, it is currently unable to impose its will on them. Notably, during Russia's presidency of BRICS in 2024, Kazakhstan refrained from joining the bloc, which, in Putin's eyes, represents the "global majority." Moscow's frustration with Astana was reflected in a ban on imports of Kazakhstani fruits and vegetables.[99]

2.3. Tajikistan's Concern: Afghanistan and Regime Stability

While most Central Asian states have begun normalising relations with the Taliban government, Dushanbe remains cautious. Due to a long (1 357km) and porous border with Afghanistan – particularly in the remote, mountainous Gorno-Badakhshan Autonomous Region – Tajikistan's defence policy prioritises addressing cross-border security threats and terrorism.

While most Central Asian states have begun normalising relations with the Taliban government, Dushanbe remains cautious

Tajikistan's armed forces rely on Soviet-era equipment, and regularly participate in CSTO counterterrorism drills, often alongside Russian troops based at the 201st Military Base. Out of 6 000 troops stationed at the base, approximately 1 500 Russian soldiers were reportedly redeployed to Ukraine in 2022. Given Russia's heavy losses, that number likely increased in 2023.[100] Nevertheless, Moscow has attempted to demonstrate its continued military engagement with Tajikistan. In October 2022, the 201st base participated in CSTO joint training "Rubezh-2022" near the Tajik-Afghan border, and in 2024, Russia conducted a bilateral counterterrorism exercise with Tajikistan aimed at preventing cross-border militant incursions. According to the Russian Defence Ministry, the exercises incorporated lessons learned from its military operations in Ukraine.[101] A similar bilateral exercise followed in April 2025.

Tajik-Chinese cooperation in the security sphere centres, as stated during Xi Jinping's visit to Dushanbe in 2024, on combating the "Three Evil Forces" along with transnational organised crime (including drug trafficking and cybercrime) and information security. For China, Tajikistan serves as a key buffer against threats emanating from Afghanistan, and their cooperation dates back to the early 2000s within the SCO framework.

Between 2002 and 2023, Tajikistan took part in 19 of 36 joint military exercises China held with Central Asian states, both bilaterally and under the SCO framework. These exercises include military and internal security forces, focusing on border security, counterterrorism, and internal stability.[102] President Emomali Rahmon is particularly concerned about ensuring a smooth succession to his elder son, Rustam Emomali, who currently serves as mayor of Dushanbe and chairman of

[98] Seddon and Cook, "Russia's Fears over Ex-Soviet Nations Laid Bare in Leaked Paper."

[99] Ketrin Jochecová, "Russia Bans Fruit and Veg from Kazakhstan after Country Refuses to Join BRICS," *Politico*, 18 October 2024.

[100] "Они уехали на 4 месяца и больше не вернулись [They left for four months and never came back]," *Ozodi*, 13 September 202.

[101] "Soldiers from Russia and Tajikistan Stage Counter-Terrorist Drills," *Reuters*, 18 April 2024.

[102] Edward Lemon and Ruslan Norov, "How China Is Adapting to Tajikistan's Demand for Security Cooperation," *Carnegie Endowment for International Peace*, 20 March 2025.

the Tajik parliament's upper chamber. During Rustam's visit to Beijing in 2023, China pledged a $2 mn grant for the construction of a new Tajik government building.

Since 2015, the Chinese Ministry of Public Security has provided professional training programmes for officials from Tajikistan's Ministry of Internal Affairs and border forces, with regular high-level meetings between internal security agencies.[103] Russia withdrew its border guards from the Tajik-Afghan border in 2005, retaining its largest overseas military base – the 201st Military Base – in Dushanbe. In 2019, *The Washington Post* reported that since 2016, China had maintained a secret military base in Tajikistan near the Afghan border, allegedly to counter what it perceives as Uyghur separatists operating from Afghanistan. However, Tajik officials clarified that it was in fact a Tajik border outpost built with Chinese financial and technical support.[104] Whatever the form of China's participation, according to Alexander Gabuev of the Carnegie Moscow Center, in 2017, a Chinese government think tank invited several Russian experts, including him, to Beijing and sounded out where Russia's "red lines" lay regarding China's security presence in Central Asia.[105]

After the Taliban's return to power, Dushanbe requested a more robust Chinese presence along the Afghan border. In October 2021, the Tajik parliament approved an agreement permitting China to construct a special base in the Wakhan Corridor, located in the Gorno-Badakhshan Autonomous Region. The base, a joint project between Tajikistan's Ministry of Internal Affairs and China's Ministry of Public Security, is designed for a rapid response unit of Tajikistan's Department for Combating Organised Crime.[106] In 2022, the two countries agreed to hold bilateral anti-terrorist exercises at least every two years.

By contrast, a series of actions by Moscow may have fuelled Dushanbe's scepticism regarding Russia's counterterrorism commitments. A January 2025 journalistic investigation revealed that the Russian military intelligence (GRU) had systematically sponsored elements of the Taliban in targeting US forces in Afghanistan in the late 2010s.[107] Moscow's apparent disregard for early US warnings about the 2024 terrorist attack on a concert hall further suggests that Russia deprioritises counterterrorism while remaining preoc-cupied with the war in Ukraine.[108] In July 2024, Putin called the Taliban "allies in the fight against terrorism," and a year later, Russia became the first country to recognise the Taliban government.

China is expanding networks of private security companies to protect its economic assets amid growing anti-Chinese sentiments in some states

Though not military instruments, China is expanding networks of private security companies – such as Zhongjun Junhong Security Group – in Central Asia to protect its economic assets amid growing anti-Chinese sentiments in some states. With the Chinese economic expansion, the number of such security companies is expected to rise.[109] In November 2024, Tajik local media reported an

[103] Yau, *China's Security Management towards Central Asia*, 54–55.

[104] "The Washington Post приняла таджикскую погранзаставу в Мургабе за военный объект Китая, - источник [The Washington Post mistook a Tajik border post in Murghab for a Chinese military facility, according to a source]," *ASIA-Plus*, 21 February 2019.

[105] Gerry Shih, "In Central Asia's Forbidding Highlands, a Quiet Newcomer: Chinese Troops," *The Washington Post*, 19 February 2019.

[106] "Китай строит базу в Таджикистане стоимостью около 100 млн сомони [China is building a base in Tajikistan worth around 100 million somoni]," *ASIA-Plus*, 28 October 2021.

[107] Roman Dobrokhotov et al, "Afgantsy Redux: How Russian Military Intelligence Used the Taliban to Bleed U.S. Forces at the End of America's Longest War," *The Insider*, 8 January 2025.

[108] Sanshiro Hosaka, "A Failure of Personalised Services: Prioritising Regime Security over Public Safety," *ICDS*, 3 April 2024.

[109] Sergey Sukhankin, *The Role of PSCs in Securing Chinese Interests in Central Asia: The Current Situation and Future Prospects, Guardians of the Belt and Road* (The Jamestown Foundation, 2023).anti-Chinese sentiments and the overall level of suspicion toward Beijing have been on the rise. Frequently, this leads to public protests that sometimes result in instances of violence. To protect its nationals and property, China is considering the increased use of private security companies (PSCs).

armed attack on Chinese mine workers near the Afghan border, resulting in one Chinese national killed and five injured.[110]

Since the outset of the US invasion of Afghanistan in 2001, Tajikistan has been a valuable partner in supporting US operations in the region. Since 1992, the US has allocated over $330 million in security assistance to Tajikistan.[111] Following the US withdrawal from Afghanistan, the Biden administration intensified diplomatic and defence engagement with Dushanbe. In the first half of 2022, senior US officials – including Assistant Secretary of State Donald Lou, Special Representative for Afghanistan Thomas West, and CENTCOM Commander General Michael Kurilla – visited Tajikistan.[112] In August 2022, Tajikistan hosted the US-led military exercise "Regional Cooperation 22," involving Kazakhstan, Kyrgyzstan, Uzbekistan, Mongolia, and Pakistan. It also conducted a five-day bilateral training with US forces at the Fakhrabad Training Centre.

Although the Biden administration inaugurated the C5+1 presidential summit during the UN General Assembly in 2023, the region as a whole does not appear to be a priority in the foreign policy of Trump's second presidency. However, given President Trump's expressed interest in critical minerals in Ukraine and their importance for US defence industrial production, the region's substantial mineral reserves could attract his attention if Central Asian states offer them as a means to help diversify US supply chains.[113] While logistical infrastructure and processing facilities are often controlled by Chinese and Russian entities, a platform for discussing such cooperation was launched during the Biden administration in the form of the C5+1 Critical Minerals Dialogue.[114]

The 2022 border conflict with Kyrgyzstan highlighted the tactical advantage of UAVs, with Bishkek deploying Turkish Bayraktar TB2 drones. While the other four Central Asian states have collaborated with Türkiye on drone production, Tajikistan is the only country to host an Iranian drone manufacturing factory, which has been operating in Dushanbe since 2022.[115]

2.4. Diversifying Security Ties

Russia's full-scale invasion of Ukraine in 2022 and its initial military setbacks have not prevented Central Asian states from continuing to procure Russian heavy equipment (see Figure 1) and host CSTO and bilateral military exercises with Moscow. At the same time,

China's security assistance has helped fill part of the void created by the Taliban's return to Kabul and Russia's preoccupation with the war in Ukraine

China's security assistance has helped fill part of the void created by the Taliban's return to Kabul and Russia's preoccupation with the war in Ukraine. Nevertheless, both Kazakhstan and Tajikistan are seeking to diversify security partnerships beyond Russia and China, deepening cooperation within the region and actively engaging with external partners such as the OTS countries and Iran. The other three states – Kyrgyzstan, Uzbekistan, and Turkmenistan – have also embarked on diversifying their security partnerships to varying degrees.

In terms of integration into both the Russia-led CSTO and the China-led SCO, Kyrgyzstan's position is most similar to that of Tajikistan. Uzbekistan, an SCO member that suspended its CSTO membership in 2012, and Turkmenistan, which maintains a formal policy of

[110] "One Chinese Citizen Killed, Four Others Injured in Attack near Tajik-Afghan Border," *ASIA-Plus*, 20 November 2024.

[111] Michael Hilliard et al, "Chapter VI: Tajikistan" in Michael S. Coffrey et al (ed), *The Armed Forces of Central Asia* (The Oxus Society for Central Asian Affairs, 2024), 283–84.

[112] "Эмомали Рахмон провёл встречу с командующим Центральным командованием ВС США [Emomali Rahmon held a meeting with the commander of the US Central Command]," *Ozodi,* 15 June 2022.

[113] Ikboljon Qoraboyev, "Trump 2.0 and Central Asia: The Dilemmas of Deeper Engagement," *The Hague Research Institute for Eastern Europe, the South Caucasus and Central Asia*, February 2025.

[114] Haley Nelson and Natalia Storz, "Central Asia's Geography Inhibits a US Critical Minerals Partnership," *Atlantic Council*, April 15, 2025.

[115] Hilliard et al., *Chapter VI: Tajikistan*, 268–69.

neutrality, have historically kept their distance from Moscow and Beijing. However, both are now expanding their security partnerships in response to developments in Afghanistan and shifts in political leadership.

Russia maintains a military presence in Kyrgyzstan, operating a squadron of ground-attack aircraft at the Kant Air Base, which it has leased since 2003. Kyrgyzstan's armed forces continue to rely on outdated Soviet-era equipment and possess limited air capabilities, depending heavily on Russian support.[116]

Kyrgyzstan – which borders Xinjiang – has been a major recipient of Chinese security assistance, alongside Tajikistan, and has served as a testing ground for China's international security engagement. The 2002 China-Kyrgyz bilateral exercise marked the first time the People's Liberation Army (PLA) conducted a military exercise abroad with a foreign army. It was also the first bilateral anti-terrorism exercise among the SCO founding members.[117] During the 2019 China-Kyrgyz exercise in Urumqi, China deployed the People's Armed Police Force for the first time.[118]

In May 2023, following talks between Russian President Vladimir Putin and Kyrgyz President Sadyr Japarov, the Kremlin announced plans to expand Russian military installations in Kyrgyzstan. In October, Kyrgyzstan's parliament ratified an agreement with Russia to establish a joint regional air-defence system.[119] Nevertheless, Kyrgyzstan is also attempting to diversify its arms procurement and security partnerships, acquiring air defence equipment from Belarus, UAVs from Türkiye, and initiating defence cooperation with India both bilaterally and within the SCO framework.[120]

Since 2016, under President Shavkat Mirziyoyev, Uzbekistan has actively participated in training programmes organised by China's Ministry of Public Security, as well as in multilateral SCO joint exercises. In 2019, the Uzbekistan National Guard and China's People's Armed Police Force conducted their largest bilateral exercise. The Uzbek National Guard also cooperates with Rosgvardiya (Russia's National Guard), as well as with Turkish and US counterparts.[121]

In 2018, Russia resumed joint training with Uzbekistan's armed forces, likely due to the security situation in Afghanistan.[122] In 2019, Uzbekistan joined the OTS, and has conducted joint military exercises with regional partners, such as Azerbaijan and Kazakhstan. It has purchased UAVs from China and Türkiye. In recent years, Tashkent has initiated defence cooperation with both India and Pakistan.[123]

Turkmenistan has adhered to a formal policy of neutrality and isolation since 1995, and is not a member of either the CSTO or the SCO. Until the 11 September 2001 attacks, Turkmenistan's first president, Saparmurat Niyazov, maintained friendly relations with the Taliban, and Russian border guards withdrew from Turkmenistan in 1999. However, amid renewed instability in Afghanistan, Turkmenistan reportedly resumed joint training with Russian troops in 2018.[124] Although unconfirmed officially, reports have suggested that Russian forces may have been redeployed along the 744 km Turkmen-Afghan border.[125] In 2020, under President Gurbanguly Berdymukhamedov, Ashgabat signed a long-awaited security cooperation agreement with Russia focused on counterterrorism and combating drug trafficking – originally drafted in 2003 under Niyazov.[126]

Turkmenistan does not participate in the China-led SCO, and publicly available information on bilateral military cooperation with

[116] International Institute for Strategic Studies, *The Military Balance 2025*, 177.

[117] "Recap: Major PLA-Related Joint Anti-Terror Military Exercises and Trainings," *CCTV International*, 21 December 2007.

[118] Yau, *China's Security Management towards Central Asia*, 27.

[119] "Russia and Kyrgyzstan to Create Shared Air Defense System," *The Moscow Times*, 11 October 2023.

[120] International Institute for Strategic Studies, *The Military Balance 2025*, 177.

[121] Umida Hashimova, "Uzbekistan Leans on China for Public Security Cooperation," *The Diplomat*, 28 May 2019.

[122] Azathabar, "Russian military resumes joint training with Turkmenistan servicemen."

[123] International Institute for Strategic Studies, *The Military Balance 2025*, 204.

[124] Azathabar, "Russian military resumes joint training with Turkmenistan servicemen."

[125] Bruce Pannier, "How Much Is The Russian Military Helping Turkmenistan?," *Radio Free Europe/Radio Liberty*, 4 January 2020.

[126] "Turkmenistan: Feeling Insecure," *Eurasianet*, 27 October 2020.

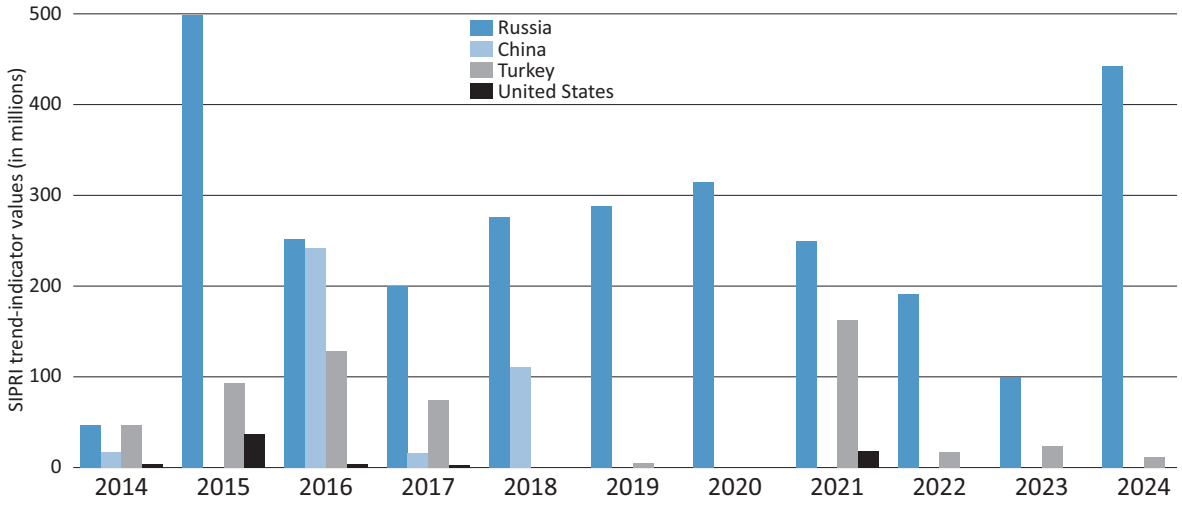

Figure 1. Major Conventional Arms Transfers to Central Asia (Excluding Small Arms).
Source: SIPRI Arms Transfers Database.[129]

China is scarce. Nevertheless, since the 1990s, the two countries have held at least 25 high-level meetings on security topics.[127] In 2022, Turkmenistan joined the OTS as an observer. Its armed forces continue to rely on Soviet-era equipment, although there are plans to modernise border guard units with UAVs from China and Türkiye.[128]

Conclusion and Recommendations: EU's Role in Central Asia

While maintaining traditional ties with Russia, Central Asian states have witnessed growing Chinese influence. Central Asia has become a testing ground for China's global political, economic, and security undertakings – the Community of Shared Destiny for the Future of Mankind and its three pillars (the Global Civilisation Initiative, GCI; Global Development Initiative, GDI; Global Security Initiative, GSI) are being tested in China's diplomacy in the region before being deployed to other regions.

Central Asia has become a testing ground for China's global political, economic, and security undertakings

Economically, China has become the main actor in most domains in Central Asia. Not only in trade and investment but also in economic areas, which have ramifications for Central Asian countries' national security and geopolitical standing. The strength of Huawei in 5G and Dahua and Hikvision in surveillance systems has cemented Chinese technology into the countries' critical infrastructure and security architecture. At the same time, physical connectivity projects such as the China-Kyrgyzstan-Uzbekistan railway are early indicators of a tipping geopolitical balance, where Beijing is able to push through Russia-exclusionary projects whose implementation Moscow has previously blocked.

Nonetheless, Russia's economic influence has not been completely marginalised by China and probably will not be in the foreseeable future. Remittances from Russia continue to make up significant portions of several Central Asian states' GDP; Russian investment is significant in many sectors, especially energy; Russian digital platforms are preferred by many Central Asian consumers; over 100 000

[127] Yau, *China's Security Management towards Central Asia*.

[128] International Institute for Strategic Studies, *The Military Balance 2025*, 197.

[129] Based on SIPRI Arms Transfers Database. The database covers only major weapons, such as aircraft (including UAVs), air defence systems, armoured vehicles, artillery, missiles, and ships. It does not include small arms or most of the policing and border security equipment supplied by China and the United States. Trend-indicator value (TIV) is a unique system developed by SIPRI to measure the volume of international transfers of major conventional weapons using a common unit.

Central Asian students continue to study in Russia; the Russian language maintains importance. While each of these aspects could decrease over time, it is unlikely that China would be able to replace Russia in soft power, at least in the short term.

It is unlikely that China would be able to replace Russia in soft power

Significant China-Central Asia economic ties impact the relationship between Central Asian leaders and Beijing, as well as perceptions of China in Central Asian civil society. On the leadership level, Beijing's role as a supplier of modernity via infrastructure investment and, therefore, an enabler of ruling legitimacy, likely gives Zhongnanhai sway among the local elite. On the level of civil society, the pervasiveness of Chinese products such as EVs in daily life means greater exposure to China. On the one hand, this can be perceived positively if citizens like Chinese brands and see China bringing a positive economic impact to daily life. On the other hand, overinvolvement can invoke negative sentiment, as visible in a 2016 wave of anti-Chinese protests in Kazakhstan, related to local job security, environmental pollution, and treatment of ethnic Kazakhs in XUAR.[130]

Whether Russia will tolerate China's growing presence in Central Asia's physical and digital connectivity depends on Russia's own bargaining position vis-à-vis China. In a scenario of Russian relative political isolation, for example, in 2022, following the full-scale invasion, Moscow has little choice but to accept Beijing's presence. But if China were to take kinetic action against Taiwan, politically isolating itself, Russia may view its relative position as strengthened and be less willing to make perceived concessions in Central Asia.

Russia remains the dominant actor in the region's military-to-military interactions

In the security domain, Moscow's efforts to reassert itself as Central Asia's primary security provider following the US withdrawal from Afghanistan have been weakened by its war against Ukraine and the gradual rapprochement between Central Asian states and the Taliban government. Nevertheless, Russia remains the dominant actor – and is likely to retain this position in the short and middle term – in the region's military-to-military inter-actions. CSTO partners – Kazakhstan, Kyrgyzstan, and Tajikistan – continue to procure Russian equipment and conduct multilateral and bilateral military exercises with Russia.

China has gradually expanded its role, particularly in border security activities near Afghanistan and counterterrorism efforts, contributing to the political stability of Central Asian leaders. This expansion began initially through the SCO, which includes Russia, and has increasingly taken place through bilateral mechanisms as well as the C+C5 format. Beijing's security engagement in Central Asia is led mainly by internal security services and paramilitary forces – such as the Ministry of Public Security and the People's Armed Police Force – and by affiliated private security companies, rather than by the People's Liberation Army.

From Beijing's perspective, a continued Russian military presence – so long as it ensures regional security and stability – is beneficial for safeguarding Chinese geo-economic interests, such as BRI, in Central Asia. Some analysts describe this as China's "free riding" on Russian and CSTO security arrangements.[131] At the same time, potential Chinese military presence could fuel anti-Chinese sentiment among local populations. Nevertheless, where its economic assets are at risk (e.g., attacks on Chinese companies), Beijing has shown little hesitation in deploying private security companies and leveraging cultivated ties with local security officers.

The extent to which Russia will tolerate China's growing security presence in the region hinges on the evolution of the Sino-Russian strategic partnership. Despite the rhetoric of a "no-limits" friendship, Moscow views Beijing as

[130] Temur Umarov, "What's Behind Protests Against China in Kazakhstan?," *Carnegie*, accessed in August 2025.

[131] Vali Kaleji, "China's Free Riding in Central Asia's Security Arrangements," *Central Asia-Caucasus Analyst*, 20 June 2024.

a competitor in Central Asia. Beyond cooperation through the SCO and rhetorical alignment against "attempts to import 'colour revolutions' and external interference in the affairs of the region" (Russia-China Joint Statement in 2023), the two countries have

As long as their shared interest in challenging the western-led international order endures, Moscow and Beijing are likely to politically downplay potential rivalries in Central Asia

few practical areas for collaboration in the region.[132] Alleged leaked documents from Russia's Federal Security Service (FSB) revealed Moscow's deepening anxiety over Chinese intelligence activities and growing influence in Central Asia.[133] Even so, as long as their shared interest in challenging the western-led international order endures, Moscow and Beijing are likely to politically downplay potential rivalries in Central Asia.

Thus, China is eroding Russia's sphere of influence in Central Asia. However, it would be misleading to portray this simply as a process of China gradually replacing Russia. Central Asian countries are predominantly pursuing multi-vector foreign policies, seeking

Central Asian countries leverage a state of "multiplexity," maximising their agency and strategic autonomy and expanding room for political manoeuvre and bargaining

to avoid overreliance on any single external actor, including China. Maintaining ties with Russia may be a part of their own balancing act. In other words, they leverage a state of "multiplexity" – an overlap of multiple spheres of influence – maximising their agency and strategic autonomy and expanding their room for political manoeuvre and bargaining.[134] Despite, or in part because of, China's expanding economic and security footprint, Central Asian countries are increasingly cultivating ties with the EU, the US, Türkiye, Iran, India, Pakistan, and the Gulf Cooperation Council (GCC) states. Even Taliban-led Afghanistan is now viewed less as a security threat and more as a potential trade partner and economic opportunity. Although the term "multi-vectorism" was originally used to describe Kazakhstan's foreign policy, the broader trend of hedging among multiple competing external powers now characterises the entire region.

The EU can leverage the current state of "multiplexity" to deepen its engagement with Central Asia in ways that distinguish it from China and Russia, while remaining sensitive to local societal dynamics.

China has portrayed itself as not interfering in domestic politics in Central Asia. Rather than imposing its security or development models, Beijing has authoritarian regimes solicit and adapt them to reinforce their own political stability in their own countries. During the second China-Central Asian Summit, Kazakhstan's President Tokayev praised China for never attaching political conditions to cooperation – implicitly alluding to western concerns over human rights in the region.

Russia, by contrast, continues to treat Central Asia as its traditional sphere of influence, often interfering in domestic political affairs. For Central Asian autocrats, securing Moscow's approval remains critical – especially for near-dynastic succession. In late May 2025, Rustam Emomali – the 37-year-old son of Tajikistan's President Emomali Rahmon – met with Putin in his capacity as Speaker of the Upper House of Parliament and Mayor of Dushanbe. The following day, Saida Mirziyoyeva – the eldest daughter of Uzbek President Shavkat Mirziyoyev and officially a presidential advisor – held a series of meetings

[132] President of Russia, "Совместное заявление Российской Федерации и Китайской Народной Республики об углублении отношений всеобъемлющего партнёрства и стратегического взаимодействия, вступающих в новую эпоху [Joint Statement of the Russian Federation and the People's Republic of China on Deepening Comprehensive Partnership and Strategic Interaction Relations Entering a New Era]," The Kremlin, 21 March 2023.

[133] Jacob Judah et al, "Russian Spies Are Suspicious of China, Even as Putin and Xi Grow Close," *The New York Times*, 7 June 2025.

[134] Jessica Neafie et al, "The Rising Multiplex World Order and Regional Order in Central Asia: A Case Study of the Emerging Role of the EU and Its Implications for Kazakhstan's Multivector Foreign Policy," *Economic Diplomacy* 3, no. 1 (2025): 3–4.

with senior Kremlin officials and Russian Prime Minister Mikhail Mishustin.[135]

Amid growing external competition, Central Asian elites hold nuanced views of the EU's roles. For example, a study of mid-level Kazakh elites revealed three groups: opponents, ardent supporters, and the largest group – moderate supporters. While the moderates generally endorse the EU's political values, such as democracy and human rights, they are sceptical of some of its cultural norms, particularly LGBTQ rights and perceived threats to traditional family bonds.[136]

Central Asian elites hold nuanced views of the EU's roles

Nevertheless, the inaugural EU-Central Asia Summit in April 2025 in Samarkand marked a step forward, elevating relations to a strategic partnership and expressing a shared commitment to cooperating for peace, security, and democracy, as well as the promotion and protection of the rule of law, human rights, and fundamental freedoms.[137]

In the evolving global and regional geopolitical landscape, the EU has an opportunity to build a mutually beneficial partnership, contributing meaningfully to Central Asia's resilience, prosperity, and regional cooperation.

Enhancing Regional Cooperation and Strategic Autonomy

One key avenue is supporting regional cooperation. The recent revitalisation of "C5+" summit formats with China (inaugurated in May 2023), the Gulf Cooperation Council (in July 2023), the US (in September 2023), and the EU (in April 2025) reflects renewed momentum for regional cooperation (see Annex Table a.1.).[138] Following independence in 1991, Central Asian states had little incentive to pursue regional integration. The Central Asian Cooperation Organisation (CACO) – formed in the early 2000s by Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan (excluding Turkmenistan) – was short-lived and dissolved after merging into the Russia-led Eurasian Economic Community.

Since 2017, however, political will for regional dialogue has gained traction, particularly with the launch of the Consultative Meetings (CM) of the Central Asian Presidents, initiated by President Mirziyoyev of Uzbekistan. By 2024, six meetings had taken place, addressing topics ranging from security cooperation to the cultivation of a shared "regional identity."[139] In addition, many of the long-standing rivalries and border disputes between Central Asian states have been resolved; most recently, Kyrgyzstan and Tajikistan signed a border agreement in March 2025.

The EU can build on this growing intra-regional dynamic and shared aspirations for regional cooperation

The EU can build on this growing intra-regional dynamic and shared aspirations for regional cooperation. European engagement should focus on fostering deeper regional collaboration and supporting Central Asian efforts to enhance their strategic autonomy – enabling them to avoid becoming anyone's 'backyard' in an increasingly contested geopolitical landscape.

[135] Alexander Thompson, "Kids of Central Asian Leaders Make Their Moscow Debuts," *Eurasianet*, 4 June 2025.

[136] Zhanibek Arynov, "'Nobody Goes to Another Monastery with Their Own Charter': The EU's Promotion of 'European Values' as Perceived in Central Asia," *Europe-Asia Studies* 74, no. 6 (July 2022): 1028–50.

[137] European Council, the Council of the European Union, "Joint Declaration Following the First European Union-Central Asia Summit, 4 April 2025, Samarkand, Uzbekistan," 4 April 2025.

[138] In 2004, Japan launched a "Central Asia plus Japan" Dialogue, which became the first ministerial-level C5+ format. It was later followed by similar initiatives from South Korea, the EU, the US, China, India, and Russia. Tokyo had planned to elevate the Dialogue to a summit level, scheduling Prime Minister Kishida Fumio's visit to the region in August 2024. However, the trip was cancelled at the last minute, due to a warning about an elevated risk of a 'megaquake' in Japan. Tomohiko Uyama, "Japan Readies for First Central Asia Summit," *The Diplomat*, 7 August 2024. Similarly, the South Korea-Central Asia Summit scheduled for 2025 was postponed due to the political crisis in Seoul. Kim Seung-yeon, "S. Korea-Central Asia Summit Postponed to next Year amid Political Fallout," *Yonhap News Agency*, 27 June 2025.

[139] Farkhod Tolipov, "One Step Forward, Half a Step Back: The Sixth Consultative Meeting of Central Asian Leaders," *The Central Asia-Caucasus Analyst*, 3 October 2024.

In a broader strategic landscape, Central Asia is vital to China as a backup international trade route, energy supply, and other connectivity in case of war or any other contingencies in the Indo-Pacific region, including potential western economic sanctions.[140] A major Taiwan contingency is expected to significantly disrupt China's international trade through the Taiwan Strait.[141] Developing the Middle Corridor and turning Central Asia states into its 'backyard' may help China mitigate these potential disruptions, and could, in the longer term, embolden Beijing to act more assertively in Indo-Pacific.

Central Asia is vital to China as a backup international trade route, energy supply, and connectivity in case of war or other contingencies in the Indo-Pacific region

Targeted Investments

The EU is one of the largest investors in Central Asia, yet its presence is difficult to feel on the ground. At the same time, Türkiye is a far smaller investor, but its presence can be felt across many cities due to targeted investments in certain sectors like healthcare and drone manufacturing. Türkiye also enjoys soft power in the region, boosted to a degree by Turkic ties, but Turkish entertainment has also been successful even in Tajikistan, a non-Turkic-speaking country.[142] Considering Türkiye's seemingly high bang-for-buck investment model, the EU may wish to take some lessons, especially when pledging large investments such as €12 bn at the April 2025 inaugural EU-Central Asia Summit in Samarkand. Finally, EU investments should utilise EU contractors where possible – this will create European jobs on the ground, build European-Central Asian people-to-people exchanges, and increase the EU's regional visibility.

Educational Push

Several Central Asian countries, including Kazakhstan, are pushing to internationalise their higher education, requiring all students at a higher level to attain certain English qualifications. EU universities have numerous high-quality English-language courses, and it would make sense for EU institutions to play to these strengths and sign memorandums, arrange programmes, and finance student exchanges between EU and Central Asian states. Several local experts mentio-ned that EU universities remain a top preference of many Central Asian students, and demand for EU-related programmes is strong. Erasmus+, an EU programme offering education opportunities with an estimated budget of €26.2 bn, has been successful in providing opportunities to Central Asian students. Currently, not all EU countries participate in the Erasmus+ programme – more joining would increase the number of country destinations that Central Asian students could travel to. Local experts highlighted the value of education through lived experience, studying abroad, and its effectiveness over simply telling others to "be democratic." Considering that international higher education is an area where the EU can be a competitor to both China and Russia in Central Asia, this field should not be overlooked.

Economic Experience Sharing, Finance

The EU can help Uzbekistan undergo economic reforms. For example, in the privatisation of the electricity sector. Currently, there is a lack of competition, and the infrastructure is old. Economic reform is generally required in public-private sector relations; the state is currently too involved, killing efficiency and innovation. The EU could conditionally provide credit, on the condition that economic reforms are made. These economic reforms are important in the region, but especially in Uzbekistan, where the reform process has been far slower than in Kazakhstan or Kyrgyzstan. This was highlighted by Uzbekistan's ambassador to the US, who suggested that the US support economic

[140] Shin Kawashima, "China's Central Asian Policy: Great Western Development, Neighborhood Diplomacy, and One Belt, One Road," International workshop "Contesting authorities in Central Asia: prospects, concerns and balances," Tartu, May 10, 2024.

[141] Matthew P. Funaiole et al, "Disruptions to Trade in the Taiwan Strait Would Severely Impact China's Economy," *Center for Strategic and International Studies*, 17 June 2025.

[142] "Tajik Migrants Find Unlikely Success Acting In Turkish Films, Soap Operas," *Radio Free Europe*, 17 April 2024.

reforms in the country.[143] The EU has many experts who could assist on such issues, and the European External Action Service (EEAS) has listed competitiveness and business environment reforms in Central Asia as an aim of its regional programmes.[144] Assisting with economic reforms should be given higher priority, as this is help that Central Asian states value and the EU has experience in.

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Value-Based Security Engagement

The EU already serves as a soft security provider in Central Asia. Since 2003, its BOMCA has implemented a wide range of projects, including responses to irregular migration and asylum seekers, combating human trafficking and drug smuggling, enhancing phytosanitary and veterinary border controls, supporting forensic and digital investigations, facilitating border delimitation and demarcation, and empowering female entrepreneurship and community development in border areas. In April 2025, BOMCA handed over advanced surveillance equipment to Tajikistan for use along its border with Afghanistan.

These efforts not only strengthen the capacity and technical capabilities of border management agencies but also promote European best practices and international norms, with due regard for human rights.[145] As such, they offer a valuable reference point for Central Asian countries, especially when contrasted with the authoritarian, heavily securitised models advocated by China and Russia.

While individual EU member states may benefit from cooperation with Central Asian states through the exchange of early warning information about terrorist threats, concerns have been raised about the human rights practices of security and law enforcement agencies responsible for counterterrorism in the region.[146] In the absence of effective civic oversight of the security sector, broad definitions of terrorism and extremism have often been used by authoritarian regimes to justify the arrest, detention and imprisonment of civil society activists, journalists, and opposition members.[147] Advancing cooperation in counterterrorism should, therefore, be pursued only in parallel with Human Rights Dialogues and accompanied by recommendations for institutional reforms of the security and law-enforcement sectors, in order to ensure adherence to the rule of law, human rights, and fundamental freedoms as affirmed in the Joint Declaration of the 2025 EU-Central Asia Summit.

The EU offers a valuable reference point, especially when contrasted with the authoritarian, heavily securitised models of China and Russia

Coordination with Central Asia vis-à-vis Afghanistan

Although not officially recognising the Taliban government, most Central Asian states actively engage with Afghanistan under Taliban control. Kazakhstan has taken a pragmatic approach, engaging with the Taliban in the hope that it will form an inclusive government and contribute to regional stability. Despite public distrust and the lack of official recognition of the Taliban regime, Astana removed the Taliban from its list of banned organisations in

[143] "Uzbekistan Working on Economic Reforms, Wants U.S. to Get More Involved," *Times of Central Asia*, 5 April 2024. /

[144] "The EU and Central Asia: A growing partnership with potential and ambition," EEAS, 18 February 2025.

[145] For example, see "Combating Human Trafficking in Kazakhstan: Global Solutions in Action," BOMCA, 21 May 2025.

[146] Aida Alymbaeva et al, *Overview of National Security Agencies in Central Asian Countries* (Geneva Centre for Security Sector Governance, 2020).

[147] International Partnership for Human Rights, *Briefing Paper for EU-Tajikistan Human Rights Dialogue: Key Concerns Regarding the Protection of Fundamental Rights in Tajikistan* (International Partnership for Human Rights, 2023).

2023, while providing humanitarian assistance and encouraging economic investment.[148]

In April 2025, a delegation from the Kazakhstan Institute for Strategic Studies under the President of Kazakhstan visited Kabul and held working meetings with key government and academic institutions (in June, the Institute's Director, Erkin Tukumov, was appointed Special Representative of the President of Kazakhstan on Afghanistan). Kazakhstan is also promoting the establishment of the UN Regional Centre for Sustainable Development for Central Asia and Afghanistan in Almaty. In this context, coordination between the EU and Central Asian states will be crucial to ensuring that Afghanistan becomes a secure, stable, and prosperous country with an inclusive government that respects human rights and fundamental freedoms.

Coordination between the EU and Central Asian states will be crucial to ensuring that Afghanistan becomes a secure, stable, and prosperous country with an inclusive government

[148] Yerkin Tukumov, "Engage or Ignore? Kazakhstan's Afghan Strategy," *Euractiv*, 26 May 2025.

Annex A.
Russia- and China-led Frameworks in Central Asia and Other Extra-Regional Engagement

	Russia	Kazakhstan	Kyrgyzstan	Tajikistan	Turkmenistan	Uzbekistan	China	Other states
CIS (1991)								
CSTO (2002)								
EAEU (2015)						Observer		
SCO (2001)								India, Pakistan, Iran
C+C5 summit (2023)								
OTS (2009)					Observer			Türkiye, Azerbaijan
CM (2017)								
C5+ summit								GCC (2023); US (2023); EU (2025).
Engaging with Taliban Gov.								Afghanistan

Table A.1. Russia- and China-led Frameworks in Central Asia and Other Extra-Regional Engagement.
Source: Authors.

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