



Forming a New Central Asia

How Kazakhstan and Uzbekistan Build Regional Order under Multipolar Pressure

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Bild/Cover: White House visit by C5 Central Asian leaders, Thursday, November 6, 2025 (Official White House Photo by Daniel Torok).

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Sammanfattning

CENTRALASIEN ÄR EN ALLT viktigare region i en framväxande multipolär värld. Kazakstan och Uzbekistan försöker utnyttja förändrade geopolitiska förutsättningar för att stärka sin suveränitet, bredda diplomatiska relationer och forma en ny regional ordning. Båda bedriver en så kallad ”multivektor”-politik för att balansera stormakter och undvika att ta sida i konflikter. De söker ekonomiska fördelar genom diversifierad handel, investeringar och utveckling av transportkorridorer. För att minska sårbarheter mot olika hot vidgar de sina säkerhetssamarbeten.

Ryssland är en oundviklig men riskfylld granne, som hanteras genom nära samarbete och varsam diplomati. Kina är en viktig ekonomisk partner, men dess växande inflytande balanseras mot inhemsk skepsis. Turkiets militära förmåga och roll som port till Europa gör landet till en strategisk partner. EU och USA ses som källor till handel och modernisering. Kazakstan och Uzbekistan samarbetar även med Sydkorea, Japan, Gulfstaterna, Indien och Iran.

Regionalt främjar den kazakisk-uzbekiska axeln ett mer sammanhållet Centralasien. Länderna uppvisar en allt mer enad front mot externa aktörer och stärker banden till Sydkaukasien genom införlivandet av Azerbajdzjan i de regionala samarbetsprocesserna. Centralasiens stater framträder därmed som allt mer proaktiva aktörer i att forma sin gemensamma framtid.

Nyckelord: Kazakstan, Uzbekistan, Centralasien, multipolaritet, ”multivektor”-politik, regionalt samarbete, Ryssland, Kina, EU, USA, Turkiet

Summary

CENTRAL ASIA IS BECOMING a pivotal region in an evolving multipolar world. Kazakhstan and Uzbekistan are leveraging shifting geopolitics to strengthen sovereignty, diversify partnerships, and shape a new regional order. Both pursue multi-vector foreign policies, balancing major powers while avoiding alignment amid rivalries.

Russia remains an unavoidable but risky neighbour, prompting close bilateral relationships and careful diplomacy. China is a vital economic partner, but its influence must be managed to account for domestic sensitivities. Turkey's military capability and role as gateway to Western markets enhance its strategic importance. The EU and the US provide opportunities for trade, investment, and connectivity. Kazakhstan and Uzbekistan also engage with South Korea, Japan, the Gulf states, India, and Iran.

Regionally, Kazakhstan and Uzbekistan are driving a more cohesive Central Asia. Their bilateral axis underpins growing regional cooperation and engagement with external powers. As internal coordination deepens and ties with the South Caucasus expand, through the inclusion of Azerbaijan in the regional processes, Central Asian states are becoming more proactive actors shaping their joint future.

Keywords: Kazakhstan, Uzbekistan, Central Asia, multipolarity, multi-vector foreign policy, regional cooperation, Russia, China, European Union, United States, Turkey

Foreword

WITHIN THE FRAMEWORK OF the Russia and Eurasia Studies Programme at FOI, Central Asia has been a crucial area of study for many years. The significance of this region has only increased since the start of the Russo-Ukrainian War in 2022. In this report, Dr Johan Engvall delves deeper into the factors and circumstances surrounding the decision-making processes and strategic considerations of Kazakhstan and Uzbekistan, the two key actors in the region, against the backdrop of a changing security environment which, as the author argues, is moving towards multipolarity with speed.

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Maria Engqvist, *Programme Director for the Russia and Eurasia Studies Programme at FOI*

Stockholm, March 2026

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Acronyms

ASEAN	Association of Southeast Asian Nations
BRI	Belt and Road Initiative
C5	Central Asia 5 (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan)
C6	Central Asia 6 (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan, and Azerbaijan)
C5+1	Central Asia 5+1 (external partner)
CACO	Central Asian Cooperation Organization
CKU	China-Kyrgyzstan-Uzbekistan railway
CSTO	Collective Security Treaty Organization
EAEU	Eurasian Economic Union
EBRD	European Bank for Reconstruction and Development
EPCA	Enhanced Partnership and Cooperation Agreement
GCC	Gulf Cooperation Council
GGI	Global Gateway Initiative
INSTC	International North-South Transport Corridor
OTS	Organization of Turkic States
RATS	Regional Anti-Terrorist Structure
SCO	Shanghai Cooperation Organization
TRIPP	Trump Route for International Peace and Prosperity
UAE	United Arab Emirates
UN	United Nations
UNSC	United Nations Security Council
WTO	World Trade Organization

Executive summary

CENTRAL ASIA IS GAINING strategic significance in an increasingly multipolar world. Rich in energy resources and rare earth minerals and situated at the crossroads of trade between Europe and Asia, the region has become an arena of growing geopolitical and economic interest. This report analyses how Kazakhstan and Uzbekistan, the two leading states in Central Asia, navigate this environment while simultaneously shaping a new regional order.

Both countries pursue a strategy of multi-vector foreign policy, which seeks to diversify external partnerships across multiple centres of power in order to balance external influence and maximise national interests. Rather than aligning with a single geopolitical camp, Kazakhstan and Uzbekistan cultivate pragmatic relationships with all major powers while attempting to avoid excessive dependence on any of them.

Russia remains an unavoidable but potentially risky partner. Its geographic proximity, economic influence, and security leverage make continued cooperation necessary. At the same time, both countries seek to reduce vulnerabilities linked to dependence on Russian markets, transport corridors, and energy infrastructure.

China represents a vital economic partner through expanding trade, investment, and infrastructure projects. Kazakhstan and Uzbekistan benefit from China's role in developing regional connectivity, but Beijing's rise must be carefully managed due to domestic sensitivities regarding Chinese economic influence, demographic concerns, and environmental impacts.

Turkey is becoming an increasingly valuable partner. Ankara plays a key role in linking Central Asia to European markets and as a provider of military modernisation and security cooperation. Kazakhstan and Uzbekistan are also active in transforming the Organisation of Turkic States from a platform for dialogue to a geopolitical player.

The EU has become an important partner for economic diversification, investment, and connectivity. The EU is Kazakhstan's largest trade partner and investor, while Uzbekistan has significantly deepened its engagement with Europe. Both countries welcome the EU's increased strategic attention to Central Asia, especially in developing the Middle Corridor that connects Asian and European markets.

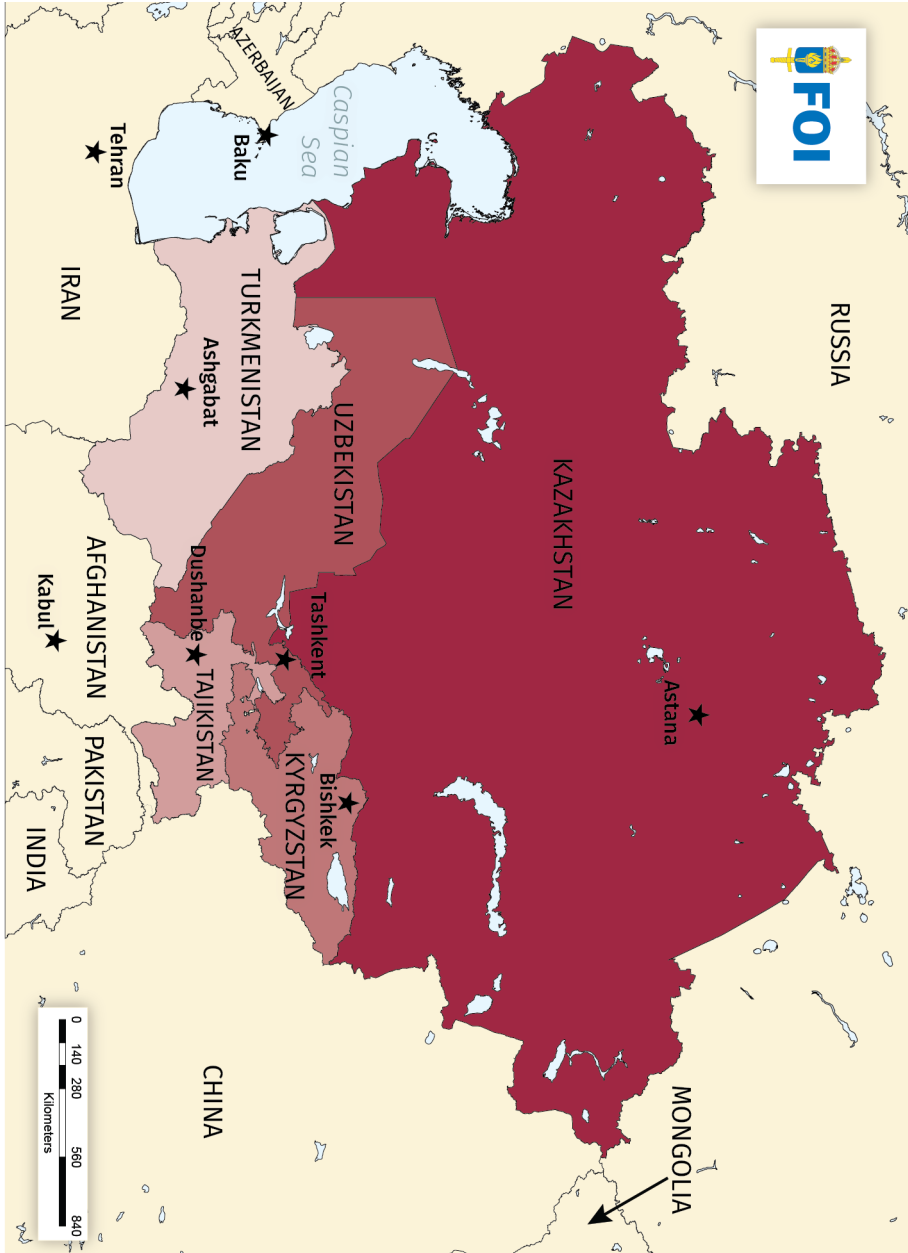
The United States is viewed as a valuable, though geographically distant, partner. While normative elements of US foreign policy have sometimes conflicted with domestic political systems, the Trump administration's transactional foreign policy has opened up opportunities for large-scale business deals.

Beyond these major powers, Kazakhstan and Uzbekistan are expanding ties with a range of additional partners. Japan and South Korea contribute investment and technology, while Gulf states are becoming significant investors in infrastructure and energy projects. India and Iran offer longer-term opportunities for trade and connectivity despite existing geopolitical constraints.

Alongside their diversified external partnerships, Kazakhstan and Uzbekistan are increasingly shaping a new regional order in Central Asia. Bilateral cooperation between the two countries has expanded significantly, leading to the signing of a strategic alliance in 2022. Under their joint leadership, regional coordination has also expanded through regular consultative meetings among Central Asian leaders and through collective engagement with external partners in formats such as C5+1. These mechanisms enhance the region's international visibility and collective power.

Several key conclusions emerge from this study. First, Central Asian states are unlikely to align with any single geopolitical bloc. Instead, they will continue to pursue diversified partnerships in order to preserve strategic autonomy. Second, regional agency is increasing as Central Asian governments seek greater control over development agendas and external engagement. Third, the region's growing strategic importance is largely driven by external geopolitical dynamics, including Russia's war in Ukraine and broader great power competition, which means that international attention to the region may fluctuate over time. Fourth, the burgeoning inclusion of Azerbaijan in Central Asian cooperation accentuates how the eastern and western sides of the Caspian Sea are merging into an interconnected geopolitical space.

Central Asia can therefore no longer be understood simply as a passive arena of great power rivalry. Kazakhstan and Uzbekistan are actively working to strengthen regional cooperation and build a more coherent regional order while balancing relations with competing external powers. The future trajectory of the region will depend both on evolving global geopolitics and on the continued consolidation of intra-regional cooperation.



Map 1 Central Asia: Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan
Source: By Karin Blect, FOI

1. Introduction

THE WORLD ORDER IS in a state of flux. At the highest level, the relative decline of US predominance is accompanied by the rise of China. Beneath, Russia's struggle to retain great power status despite mounting constraints has spurred the European Union (EU) to declare its ambition to become a geopolitical power.¹ Meanwhile, regional powers such as India, Turkey, and various regional blocs, such as the Association of Southeast Asian Nations (ASEAN) and the Gulf Cooperation Council (GCC), are becoming increasingly active, adding layers of competition and cooperation to the international system. The result is a more fragmented and contested multipolar environment, where influence is exercised through overlapping security, economic, and normative frameworks.²

Central Asia (see Map 1) is at the forefront of these global changes.³ It is rich in energy resources, possesses coveted rare earth metals, and is situated at the crossroads of trade between Europe and Asia. The region is encircled by Russia to the north, China to the east, India and Iran to the south, and Turkey to the west. Russia's invasion of Ukraine raised the stakes further, calling into question whether countries such as Kazakhstan and Uzbekistan would be forced to choose sides in the escalating geopolitical confrontation. For instance, in the wake of war and sanctions, Charles Michel, then President of the European Council, travelled to Central Asia in 2022, implicitly urging the states to align with the rules-based international order.⁴ Meanwhile, in the same year, Russian President Vladimir Putin made no less than five trips to Central Asia and held several other meetings with Central Asian leaders in an apparent attempt to demonstrate Russia's continued dominance over the region.⁵

1 On the EU's growing geopolitical ambitions, see Calle Håkansson, "The Ukraine war and the emergence of the European commission as a geopolitical actor," *Journal of European Integration*, 46, no. 1 (2024), pp. 25–45.

2 Ruth Mampuy, Corien Prins, Haroon Sheikh, and Paul 't Hart, *Navigating a Fragmenting World Order: Challenges and Opportunities for the Netherlands*, Cham, Switzerland: Springer, 2025.

3 Here, Central Asia is primarily defined as the five states of Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan. All of them became independent states following the dissolution of the Soviet Union in 1991.

4 European Council, "President Michel visits Central Asia," 28 October 2022, www.consilium.europa.eu/en/european-council/former-euco-presidents/charles-michel/news/2022/10/28/20221028-pec-visits-central-asia/.

5 Johan Engvall, "Central Asia Moves Beyond Russia," *Current History*, 122, no. 846 (2023), pp. 261–267.

While Russia considers the region its sphere of interest and maintains leverage over the Central Asian governments, its role is gradually declining, accelerated by the pressure of its war in Ukraine. China, Turkey, Western powers, and a host of other actors seek to fill this gap by intensifying their engagements with the region. For Central Asia, these global dynamics represent not only a challenge but also an opportunity. The region's leading states, Kazakhstan (the wealthiest country in Central Asia) and Uzbekistan (its most populous country) are trying to take advantage of the reconfiguration of external actors and assert a stronger role in shaping their neighbourhood.

1.1 Research questions

The purpose of this study is to examine how Kazakhstan and Uzbekistan leverage the evolving multipolar order to handle external dependencies and create a new regional order in Central Asia. To pursue this objective, the report focuses on answering the following two principal questions, each addressed in a separate chapter:

- How do Kazakhstan and Uzbekistan interpret and adapt to the dynamics of multipolarity in their relations with external powers?
- What regional approaches do Kazakhstan and Uzbekistan pursue to enhance Central Asia's agency in an increasingly multipolar world?

1.2 Why Kazakhstan and Uzbekistan

The focus of the study is Kazakhstan and Uzbekistan, by far the largest states in Central Asia. Kazakhstan has the largest territory and economy, while Uzbekistan has the largest population and lies at the centre of the region, bordering all the other Central Asian states. Kazakhstan is a regional middle power and Uzbekistan is aspiring to be one.⁶ Combined, the two countries represent about 80 per cent of the region's territory, approximately 70 per cent of the population, and 80 per cent of the regional economy. As the regional powerhouses with a growing agency to shape regional development, Kazakhstan and Uzbekistan are distinguished from their smaller, weaker neighbours, Kyrgyzstan, Tajikistan, and Turkmenistan.

For external powers, Kazakhstan and Uzbekistan hold the greatest strategic significance in Central Asia, making major powers most active in these two states.

⁶ "Which Central Asian States Qualify as Middle Powers in 2025?" *The Times of Central Asia*, 5 November 2025, <https://timesca.com/which-central-asian-states-qualify-as-middle-powers-in-2025/>.

Fact Box – The five Central Asian states.

Country	Total area (km ²)	Population	Capital	Head of state	Nominal GDP (USD)
Kazakhstan	2,724,900	20.6 million	Astana	Kassym-Jomart Tokayev	\$300 billion
Kyrgyzstan	199,900	6.8 million	Bishkek	Sadyr Japarov	\$20 billion
Tajikistan	143,100	10.6 million	Dushanbe	Emomali Rahmon	\$17 billion
Turkmenistan	488,100	7.5 million	Ashgabat	Serdar Berdimuhamedov	\$72 billion
Uzbekistan	447,400	36.4 million	Tashkent	Shavkat Mirziyoyev	\$137.5 billion

They are the main economic and transport hubs and thus the primary shapers of regional economic development projects. Moreover, in the past decade Kazakhstan and Uzbekistan have steadily strengthened their bilateral relationship as well as pushed for region-wide cooperation among all five Central Asian states. In terms of its strategic significance for Central Asia, the relationship between Kazakhstan and Uzbekistan resembles the Franco–German axis in Europe.⁷ Thus, any attempt to understand regional dynamics must consider the role of these two countries.

1.3 Conceptual framework

Several concepts are central to this study. They are defined here in order to provide a foundation for the subsequent empirical analysis.

First of all, it is common among Western governments to speak of the *rules-based international order*: a system of principles, rules, and institutions that provide for the regulation of state behaviour that is not simply dictated by coercive power. Rather than a precise legal arrangement, the rules-based international order is a normative concept emphasising the role of multilateral institutions to allow for cooperative efforts to address global challenges and arbitrate disputes.⁸

The rules-based international order is related to, but not interchangeable with, the notion of the *liberal international order*. This concept is more frequently used by scholars and explicitly emphasises the ideological component of the Western-led order conceived after 1945 and spreading outwards after the end of the Cold

7 Svante E. Cornell, “Layers of Cooperation: The Gradual Institutionalization of Central Asian Cooperation,” *Central Asia–Caucasus Analyst*, 1 August 2025, www.cacianalyst.org/resources/Cornell_Central_Asia.pdf.

8 Adam Ward, “Adapt or Die: The Need for Orders to Evolve,” *Chatham House*, 12 June 2019, www.chathamhouse.org/2019/06/adapt-or-die-need-orders-evolve; John Dugard, “The choice before us: International law or a ‘rules-based international order’?” *Leiden Journal of International Law*, 36, no. 2 (2023), pp. 223–232.

War.⁹ Liberal principles, such as democracy, human rights, market economy, and rule of law, are at the core of the liberal international order.

The erosion of liberal norms and the concomitant weakening of shared rules in international relations have coincided with an increasingly multipolar world. *Multipolarity* can be understood as a distribution of power (military, economic, technological, normative) in the international system characterised by multiple states that function as poles of gravitation, or attraction, that are sufficiently balanced to prevent a single actor from dominating. It thus contrasts with the bipolar system during the Cold War and the unipolar system under US hegemony after the collapse of the Soviet Union.¹⁰

Multi-vector foreign policy is a strategy in which a state intentionally diversifies its external partnerships to several centres of power to balance external influences and maximise national interests. This foreign policy doctrine originates in Kazakhstan. In 1997, Tokayev, now President of Kazakhstan, served as foreign minister under the country's first president, Nazarbayev, and outlined the principles of Kazakhstan's multi-vector foreign policy: to balance close relations with Russia by fostering strong ties with China, the United States, and Europe; the key was to build ties with great powers simultaneously, rather than at the expense of any power.¹¹ This foreign policy approach has since been adapted, albeit with certain nuances and differences in degree, not only by the other Central Asian states, but increasingly also by the states in the South Caucasus.

The concept of multi-vectorism resembles that of *multi-alignment*, a broader concept that has gained prominence to describe India's foreign policy under Narendra Modi's government. Its basic tenets include flexibility to tilt towards major powers and strengthening multiple overlapping and offsetting alignments.¹² Thus, if Kazakhstan invented multi-vectorism, India globalised it under the brand of multi-alignment.

Another related term used in international relations is that of *strategic hedging*: a foreign policy strategy of managing risks by balancing competing powers rather than taking sides. A hedging state seeks cooperation with a major power while

9 G. John Ikenberry, "The end of liberal international order?" *International Affairs*, 94, no. 1 (2018), pp. 7–23.

10 See Assem Dandashly, Hylke Dijkstra, Mata Marafona, Gergana Noutcheva, and Zachary Parkin, "Multipolarity and EU Foreign and Security Policy: Divergent Approaches to Conflict and Crisis Response," *JOINT Research Papers No. 6*, December 2021, www.iai.it/sites/default/files/joint_rp_6.pdf.

11 Kassym-Jomart Tokayev, *Pod styagom nezavisimosti: ocherki o vneshnei politike Kazakhstana*, Almaty: Bilim, 1997. For an early scholarly account of Kazakhstan's policy as a model for the region, see S. Frederick Starr, "Kazakhstan's Security Strategy: A Model for Central Asia?" *Central Asia Affairs*, no 3, 2007.

12 Frank O'Donnell and Mihaela Papa, "India's multi-alignment management and the Russia–India–China (RIC) triangle," *International Affairs*, 97, no. 3 (2021), pp. 801–822.

simultaneously protecting itself against overdependence or coercion. The key is to broaden the room of manoeuvrability, not shrink it.¹³

Finally, the ongoing and intensifying regional cooperation processes in Central Asia are considered in Chapter 3. In this context, the term *regionalism* describes the process of creating formal and informal institutional, political, or economic frameworks for cooperation among geographically proximate states. Similar to the historical processes of Southeast Asian regionalism, ongoing regionalisation efforts in Central Asia are “indigenously constructed rather than exogenously determined.”¹⁴ This leads to the concept of *regional agency*. International relations scholar Amitav Acharya understands regional agency as the ability of regional actors to shape the norms, institutions, and dynamics of regional order, rather than allowing external great powers to shape them.¹⁵

Fact Box 2 - Key concepts

Rules-based international order: a system of principles, rules, and institutions that provide regulation of state behaviour that is not simply dictated by coercive power.

Multipolarity: a distribution of power in the international system characterized by multiple states or poles that are sufficiently balanced to prevent a single actor from dominating.

Multi-vector foreign policy: a strategy where a state intentionally diversifies its external partnerships to several centres of power to balance external influences and maximise national interests.

Hedging: a foreign policy strategy of managing risks by balancing competing powers rather than taking sides.

Regionalism: the process of creating institutional, political, or economic frameworks for cooperation among geographically proximate states.

Regional agency: the capacity for regional actors to shape outcomes through initiatives, agenda-setting, and the promotion of local interests and norms.

1.4 Method and sources

Rather than viewing Central Asia from the typical lens of “great game” competition between external actors for influence in the region, the study adopts an “inside-out” perspective. Kazakhstan and Uzbekistan are approached as policy shapers in

13 Murad Nasibov, “Hedging Foreign Policies,” *Baku Dialogues*, 7, no. 4, 2024, <https://bakudialogues.idd.az/articles/hedging-foreign-policies-07-08-2024>.

14 Amitav Acharya, *The Making of Southeast Asia: International Relations of a Region*, Ithaca: Cornell University Press, 2013, p. 294.

15 Amitav Acharya, “The Emerging Regional Architecture of World Politics,” *World Politics*, 59, no. 4 (2007), pp. 629–652.

their own right instead of passive subjects of multipolar competition. In short, multipolarity is understood as a context within which Kazakhstan and Uzbekistan attempt to exercise agency. Consequently, documents, speeches, and interviews from Central Asia form the core of the analysis, not statements about Central Asia made by external actors.

To understand the perceptions of the political leadership of both countries on global and regional developments, the study reviews official speeches, remarks or statements, and articles by Kazakhstan's President Kassym-Jomart Tokayev and Uzbekistan's President Shavkat Mirziyoyev. These speeches and commentaries, held at different meetings and summits, target global, regional, and domestic audiences. The speeches were mainly collected from the official websites of the President of the Republic of Kazakhstan, Akorda.kz, and the President of the Republic of Uzbekistan, President.uz, respectively. These official presidential websites publish news in the state languages as well as in Russian and English. Additional official statements were obtained from local news agencies, such as the independent Uzbek outlet Kun.uz and the semi-governmental Kazakh newspaper *The Astana Times*. All Internet sources were last checked for access on 12 December 2025.

Additionally, the study relies heavily on news reports from both local and international media outlets, official statistical data, and bilateral and multilateral agreements. Secondary sources produced by Central Asian and Western experts, such as research articles, books, and analytical reports on the topics covered have been used as well. Finally, the study incorporates insights from field work in Uzbekistan conducted in April 2025 as well as numerous interviews and discussions with officials and experts from Kazakhstan and Uzbekistan between 2022 and 2025.

Temporally, the study focuses primarily on the period from 2022 to 2025. This is motivated by the significant geopolitical reconfigurations taking place in the wake of Russia's war in Ukraine, which ushered in a new wave of developments across the region. Nevertheless, the analysis is conducted against the backdrop of Central Asia's development trajectories prior to the war.

1.5 Outline

Chapter 2 addresses the question of how Kazakhstan and Uzbekistan interpret and adapt to the dynamics of multipolarity in their relations with external powers. It begins by conceptualising their approach to multipolarity, then proceeds to detail Kazakhstan's balancing of partners and Uzbekistan's pragmatic engagement with competing powers.

Chapter 3 examines the regional approaches pursued by Kazakhstan and Uzbekistan to enhance Central Asia's agency in an evolving multipolar world. To understand their attempts to craft a new regional order, the discussion considers

how the Kazakh–Uzbek rapprochement has turned into a pole of attraction, for regional consolidation in this multipolar world, anchored in mini-lateral and multilateral mechanisms of cooperation.

Chapter 4 summarises the key findings and spells out the major implications of the study.

2. Kazakhstan and Uzbekistan navigating multipolarity

THE PAST DECADE HAS witnessed a steady erosion of the Western-led rules-based international order with its emphasis on multilateral institutions, international law, and diplomacy. In its place, a multipolar world is taking form, in which great powers increasingly define their national interests vis-à-vis one another in antagonistic terms. In the emerging order, rules-based multilateralism is giving way to bilateral transactionalism, diplomatic conflict resolution to military force, and the promotion of normative principles to pragmatic strategic competition.¹⁶

Great power dynamics are crucial to this development. As geopolitical rivalries intensify, great powers seek to influence the foreign policy orientation of all Central Asian states, with Kazakhstan and Uzbekistan being the most important targets. Both states acknowledge that it is imperative to avoid being caught in the middle of great power competition. At the same time, they embrace this reality, seeking to maximise their gains from competition among external powers to offer security assistance and economic deals.¹⁷ This chapter examines how Kazakhstan and Uzbekistan interpret and adapt to the dynamics of multipolarity in their relations with external powers.

2.1 Multipolarity

Kazakhstan and Uzbekistan acknowledge a profound transformation in international relations, characterised by growing rivalry and mistrust between great powers. Viewing multipolarity as an emerging feature of international relations, their foremost foreign policy priority is to craft policies that adapt to and capitalise on the new international dynamics. Kazakhstan's President Tokayev regretfully notes

16 G. John Ikenberry, "Three Worlds: The West, East and South and the competition to shape global order," *International Affairs*, 100, no. 1 (2024), pp. 121–138; Svante E. Cornell, "The Geopolitics of the Caucasus and the Road to War," in *After Karabakh: War, Peace, and the Forging of a New Caucasus*, edited by Cornell and Damjan Krnjević Mišković, Washington, DC: American Foreign Policy Council, 2025, pp. 23-52; Arta Moeini, "A Requiem for the Rules-Based Order: The Case for Value-Neutral Ethics in International Relations," *Carnegie Council for Ethics in International Affairs*, 5 October 2023, www.carnegiecouncil.org/media/article/requiem-rules-based-order.

17 Bradley Jardine and Edward Lemon, *Backlash: China's Struggle for Influence in Central Asia*, London: Hurst, 2025, p. 74.

that the formation of the modern multipolar world is a painful process, circumscribed by geopolitical fragmentation, the return of bloc mentalities, the weaponisation of economic policy, and ineffective multilateral institutions.¹⁸

To navigate a volatile geopolitical landscape, Tokayev has called for a proactive adaptation policy, in which Kazakhstan pursues a balanced foreign policy, anchored in multilateral institutions and with an expanded circle of cooperation. In this endeavour, Tokayev emphasises Kazakhstan's unique position as a bridge between east and west, and north and south. This position, at the intersection of exchanges in goods, ideas, and cultures, will help Kazakhstan pursue its distinct vision of multilateralism and of being a hub between major powers.¹⁹

Uzbekistan's President Shavkat Mirziyoyev is less explicit about multipolarity, but notes how great power rivalries are fundamentally reshaping international relations: "We are all witnessing that major geopolitical powers, which used to protect their interests mainly through diplomacy, have now turned to the path of open pressure, confrontation, and conflict."²⁰ In 2021, Uzbekistan's then Minister of Foreign Affairs, Abdulaziz Kamilov, formulated the government's understanding of evolving multipolarity in the following words:

Today a multipolar world is taking form. If we live in such a world and rely on a one-sided policy, a one-sided vector, then such a policy will be insufficient and even counter-productive. Moreover, such a course may carry certain risks.²¹

As Kamilov argues, in a world of multiple poles with a lack of clear leadership, attempting to align solely with one major power increases rather than reduces insecurity. Overall, Uzbekistan's diplomatic strategy under Mirziyoyev's leadership rests on three principles: openness, pragmatism, and multi-vector policy. In practice, these principles translate into a readiness for dialogue with all partners on the basis of mutual respect, a focus on tangible results over lofty declarations, and a

18 "Otnosheniya mezhdru Kazakhstanom i Rossiei imeyut bogatoe proshloe i blestyashchee budushchee," *Izvestia*, 8 November 2023, <https://iz.ru/1601418/valentin-loginov/otnosheniia-mezhdru-kazakhstanom-i-rossiei-imeyut-bogatoe-proshloe-i-blestiasheche-budushchee>; "President Kassym-Jomart Tokayev's speech at the Plenary Session of Astana International Forum," *Akorda.kz*, 8 June 2023, www.akorda.kz/en/president-kassym-jomart-tokayevs-speech-at-the-plenary-session-of-astana-international-forum-853210.

19 "President Kassym-Jomart Tokayev's speech at the Plenary Session of Astana International Forum," *Akorda.kz*, 8 June 2023, www.akorda.kz/en/president-kassym-jomart-tokayevs-speech-at-the-plenary-session-of-astana-international-forum-853210.

20 "'Geopolitical powers started moving away from diplomacy to open pressure'—Shavkat Mirziyoyev," *Kun.uz*, 22 December 2023, <https://kun.uz/en/90427035>.

21 "Kamilov prokomentiroval mnogovektornuyu politiku Uzbekistana," *Kun.uz*, 29 October 2021, <https://kun.uz/ru/56184291>.

balanced diplomacy that accommodates the diverse interests of major powers and regional partners.²²

Kazakhstan and Uzbekistan share the same set of fundamental diplomatic principles, including multilateralism, the primacy of international law, sovereignty, territorial integrity, indivisible security, and non-interference in the domestic affairs of other states. On the one hand, they interpret the principles of sovereignty and non-interference as interconnected and in line with Russia's and China's opposition to Western governments' promotion of liberal values, including democratisation. These values have typically been associated with undue interference in internal matters, as a potential source of domestic destabilisation and as a means to foster regime change. On the other hand, their commitment to international law and the territorial integrity of states has led them to find largely common ground with Western countries.²³

Kazakhstan and Uzbekistan cherish multilateral institutions, emphasising the indispensable role of the United Nations (UN). A multipolar world is not seen as detrimental to multilateralism. However, they advocate for an urgent need to reform the UN to better correspond to current realities. In this regard, Tokayev has been particularly forward-leaning, as evidenced by his statement at the 80th session of the UN General Assembly:

[C]omprehensive reform of the United Nations is a strategic necessity, not a subject for endless contemplations. . . A central pillar of this bold effort to renew the UN should be a reform of the Security Council. Major powers of Asia, Africa, and Latin America should be represented in the Security Council on the rotational basis. In addition, Kazakhstan strongly believes that the voices of responsible Middle Powers also need to be seriously amplified in the Security Council. In fact, they have already started to play a larger positive role in international relations, bringing balance and building trust. They can act as bridges within the UN when major powers are divided or failing to resolve pressing issues of common concern.²⁴

President Mirziyoyev reiterated this approach, stating that Uzbekistan wishes to “support the transformation of the United Nations Security Council (UNSC)

22 Abdulaziz Khidirov, “New Uzbekistan – An Important Initiator of an Open and Pragmatic Foreign Policy in the Global Community,” *UzA*, 30 August 2025, https://uza.uz/en/posts/new-uzbekistan-an-important-initiator-of-an-open-and-pragmatic-foreign-policy-in-the-global-community_755123.

23 For example, since 2022 joint EU–Central Asia statements and declarations have reaffirmed the joint commitment “to fully respect international law, including the UN Charter and the fundamental principles of respect for the independence, sovereignty and territorial integrity of all States, within their internationally recognised borders.” See “EU–Central Asia Summit (Samarkand, 4 April 2025)—Joint Declaration,” *European Council*, 3 April 2025, <https://data.consilium.europa.eu/doc/document/ST-7745-2025-REV-1/en/pdf>.

24 “Statement by President of Kazakhstan Kassym-Jomart Tokayev at the General Debate of the 80th session of the UN General Assembly,” *Akorda.kz*, 23 September 2025, www.akorda.kz/en/statement-by-president-of-kazakhstan-kassym-jomart-tokayev-at-the-general-debate-of-the-80th-session-of-the-un-general-assembly-248206.

and the expansion of its membership in order to effectively address current threats and challenges, and protect the interests of the developing countries.”²⁵ While their views on the UN’s functioning are closely aligned, the two countries are not toeing either Russia or China’s line. Instead, they are aligning with middle powers, particularly Turkey. Turkish President Recep Tayyip Erdoğan has repeatedly criticised the UNSC for being outdated, unrepresentative, and in need of reform. His standard slogan is “the world is bigger than five.”²⁶

Consequently, for Kazakhstan and Uzbekistan, multipolarity means something very different from what it means for Russia. The Kremlin has long promoted multipolarity as an alternative to US hegemony, but also uses the concept to validate a right to a privileged sphere of interest in its near abroad. Russia sees its domination of the post-Soviet space as a prerequisite for its position as an independent pole in a multipolar world.²⁷

Both Kazakhstan and Uzbekistan firmly reject a choice between aligning exclusively with either a supposed Russian sphere of interest, a multipolar order defined on China’s terms, or a Western-led liberal international order. Instead, they actively pursue non-polarity: an approach centred around persistent engagement with all major states and organisations. To the fullest extent possible, this means “to choose everyone,” as an Uzbek diplomat explained.²⁸ The implication of this is that to mitigate the risk of one-sided dependencies on an aggressive Russia and a rising China, Kazakhstan and Uzbekistan want more of a Western presence in Central Asia, not less.

2.2 Multi-vector diplomacy

Kazakhstan and Uzbekistan, as well as their smaller neighbours Kyrgyzstan, Tajikistan, and Turkmenistan, pursue multi-vector foreign policies to ensure a range of options. For Central Asian states, “multi-vectorism” entails engaging “with multiple partners that pursue contrasting, if not clashing, foreign policy strategies.”²⁹ As previously mentioned, Kazakhstan led the way in developing a multi-vector foreign

25 “Address by the President of the Republic of Uzbekistan Shavkat Mirziyoyev at the 80th session of the United Nations General Assembly,” *President.uz*, 23 September 2025, <https://president.uz/en/lists/view/8525>.

26 “Türkiye: His Excellency Recep Tayyip Erdoğan President,” United Nations General Debate, 23 September 2025, <https://gadebate.un.org/en/80/turkiye>.

27 Jakob Hedenskog and Gudrun Persson, “Russian security policy,” in *Russian Military Capability in a Ten-Year Perspective—2019*, edited by Fredrik Westerlund and Susanne Oxenstierna, FOI-R--4758--SE, December 2019, p. 83.

28 Author’s discussion with Uzbek diplomat, Tashkent, April 2025.

29 Murad Nasibov, “Hedging Foreign Policies,” *Baku Dialogues*, 7, no. 4, 2024, <https://bakudialogues.idd.az/articles/hedging-foreign-policies-07-08-2024>.

policy to balance relations with major powers. This diplomatic model with partnerships reaching out as broadly as possible has enabled Kazakhstan to build strong economic and political relations with multiple partners without creating adversaries.

However, since 2022, Kazakhstan has been caught in the middle of the hostility between Russia and the West. President Tokayev “compared the situation to passing through Scylla and Charybdis.”³⁰ Despite the return of divisive blocs, high-level officials have communicated that Kazakhstan does not want to be “placed in the same basket as Russia,” stating “if there is a new iron curtain, we do not want to be behind it.”³¹ As Kazakh scholar Nargis Kassenova observes, Kazakhstan’s principal response in addressing the dilemma has been to put its multi-vector foreign policy in “overdrive” in an effort to establish a new equilibrium amid growing geopolitical uncertainties. There are no opposition forces in Kazakhstan seriously challenging this foreign policy.³²

Uzbekistan’s foreign policy has undergone remarkable changes following the death of its first president, Islam Karimov (head of state, 1991–2016). Karimov’s main priority was to enforce peace and order within Uzbekistan’s territorial borders. With a heavy hand, he sought to build a “fortress Uzbekistan” to prevent instability from spilling over into the country.³³ This often led to strained relations with neighbours, isolation from regional processes, and scepticism towards multilateralism.

Karimov’s successor, President Mirziyoyev, immediately embarked on a different path, opening up Uzbekistan to the outside world. Uzbekistan proactively pursues a multitude of diplomatic partnerships and an active role in international organisations. Economic factors, in particular the expansion of trade and investment cooperation, have replaced security concerns as the main drivers of Uzbek foreign policy. The key priorities in the official Uzbekistan 2030 strategy, adopted in 2024, include expanding trade diversification and becoming a geostrategic hub for land-based continental trade.³⁴ For Uzbekistan and the other landlocked Central Asian states, this requires a focus on resilient multimodal infrastructure.

Great power pressure on Uzbekistan resembles that of Kazakhstan. In early 2023, US Secretary of State Antony Blinken visited both Uzbekistan and Kazakhstan,

30 Quoted from Nargis Kassenova, “Between Scylla and Charybdis: Kazakhstan Foreign Policy in Pursuit of a New Equilibrium,” *Central Asia–Caucasus Analyst*, 5 September 2022, www.cacianalyst.org/resources/pdf/220905_FT-Kazakhstan.pdf.

31 “Kazakhstan does not want to be behind a new iron curtain, deputy minister says,” *Reuters*, 28 March 2022, www.reuters.com/world/kazakhstan-does-not-want-be-behind-new-iron-curtain-deputy-minister-2022-03-28/.

32 Nargis Kassenova, “Between Scylla and Charybdis: Kazakhstan Foreign Policy in Pursuit of a New Equilibrium,” *Central Asia–Caucasus Analyst*, 5 September 2022, www.cacianalyst.org/resources/pdf/220905_FT-Kazakhstan.pdf.

33 Matteo Fumagalli, “When Security Trumps Identity: Uzbekistan’s Foreign Policy under Islam Karimov,” in *Constructing the Uzbek State: Narratives of Post-Soviet Years*, edited by Marlene Laruelle, London: Lexington Books, 2017, pp. 4–6.

34 Development Strategy Center, *Uzbekistan Strategy 2030*, Tashkent: Development Strategy Center, 2023.

which led Russian Foreign Minister Sergey Lavrov to remark that the purpose of Blinken's visit was to prevent the countries from maintaining good relations with Russia. Shortly afterwards, Mirziyoyev described the situation to a domestic audience:

You should know: times are very complicated. Now big countries are saying: "Is Uzbekistan on the side of someone? It is enough now, it is high time to define your position." Their representatives [big countries] are coming and urging us to do so.³⁵

In this light, Uzbekistan's multi-vector foreign policy serves to enhance flexibility and avoid taking sides. As in Kazakhstan, this is an uncontested strategy: "It is the party line," as an Uzbek politician explained.³⁶

The multi-vector foreign policies of Kazakhstan and Uzbekistan are not unilateral processes. Success depends on the willingness of other powers to invest in these relationships and fulfil a role in their multi-vector quests. This raises the question of how Kazakhstan and Uzbekistan manage their interactive relationships with external actors.

2.2.1 Russia

Russia continues to loom large over Kazakhstan's foreign policy. Firstly, Kazakhstan shares the world's longest land border with Russia and accommodates the second-largest ethnic-Russian minority after Ukraine. Approximately three million ethnic Russians, approximately 15 per cent of Kazakhstan's population, are citizens of Kazakhstan. Since independence, uncertainties about Russia's plans for northern Kazakhstan have had a major impact on Kazakhstan's security calculations. Time and again, Russian politicians and media figures fuel tensions by proclaiming northern Kazakhstan to be historically Russian land.

Secondly, Kazakhstan has a military alignment with Russia in the Collective Security Treaty Organisation (CSTO), and hosts several Russian military installations, such as the Baikonur Cosmodrome in southern Kazakhstan.³⁷ Amid unprec-

35 "Shavkat Mirziyoyev speaks about Uzbekistan's position in foreign policy," *Kun.uz*, 13 March 2023, <https://kun.uz/en/news/2023/03/13/shavkat-mirziyoyev-speaks-about-uzbekistans-position-in-foreign-policy>.

36 Author's conversation with Uzbek politician, Tashkent, April 2025.

37 Since 1994, Russia has leased the Baikonur Cosmodrome under a formal agreement that has been extended until 2050. While Baikonur, thus, is de jure Kazakh territory, its operations are de facto administered by Russian authorities. For Russian military bases and installations in Central Asia, see Kristina Melin, Johan Engvall, and Ismail Khan, "Shifting balances: The war and Russia's neighbours," in *Russia's War Against Ukraine and the West: The First Year*, edited by Maria Engqvist and Emil Wannheden, Stockholm: FOI-R--5479--SE, June 2023, pp. 45–64; Jakob Hedenskog, Erika Holmquist and Johan Norberg, *Security in Central Asia: Russian policy and military posture*, FOI-R--4756--SE, May 2019.

edented unrest in Kazakhstan in January 2022, President Tokayev requested and received a Russian-led CSTO intervention to help secure his hold on power.

Thirdly, Russia remains a significant trading partner and a leading source of foreign investment in the Kazakh economy, in which major Russian companies have an entrenched presence. Kazakhstan also has to grapple with an unhealthy dependence on Russian infrastructure to bring its commodities, especially its vast energy resources, to world markets. Institutionally, Kazakhstan is embedded in the Eurasian Economic Union (EAEU), which formalises dependence on Moscow and makes it vulnerable to spillover effects from economic shocks in Russia.³⁸

The close geographic, historical, demographic, military, and economic ties to Russia make decoupling from Moscow unfeasible for Kazakhstan. There are no indications that Kazakhstan seeks to withdraw from either the CSTO or the EAEU. Kazakhstan's foreign policy following Russia's full-scale invasion of Ukraine rests on finding common ground with Russia and avoiding a policy that the Kremlin could perceive as "anti-Russia." Meetings between President Tokayev and Russian President Putin remain as frequent as ever. Thus, Kazakhstan's strategy is to keep Russia as close as possible while concomitantly pursuing alternative partnerships.

For instance, on 12 November 2025, less than a week after President Tokayev visited Washington for an unprecedented elevation of Kazakhstan's relationship with the US (see below), he met with Putin in Moscow to sign a new declaration lifting the Kazakhstan–Russia relationship to a "comprehensive strategic partnership and alliance." The agreement intends to deepen cooperation within a broad set of areas, with special attention paid to energy, including nuclear power, transport, education, and security.³⁹ This may appear contradictory, but it reflects Kazakhstan's foreign policy approach: to position itself as a key diplomatic player able to engage with both Washington and Moscow within days.

Trade volumes between Kazakhstan and Russia have continued to increase since 2022. According to official Kazakh statistics, Russian exports to Kazakhstan grew by almost five per cent between 2023 and 2024, reaching USD 18.25 billion, equivalent to roughly 20 per cent of the country's imports. Kazakhstan's trade within the Russia-led EAEU is highly skewed; in 2024, exports to EAEU countries were close to USD 11 billion, whereas imports were USD 19.5 billion, resulting in a trade deficit of USD 8.5 billion.⁴⁰ Bilateral energy cooperation has also strengthened, with Russian involvement in several new infrastructure projects in

38 For more details, see Johan Engvall, "Central Asia Moves Beyond Russia," *Current History*, 122, no. 846 (2023), pp. 261–267.

39 Ayana Birbayeva, "Kazakhstan, Russia Sign Landmark Comprehensive Alliance Declaration," *Astana Times*, 12 November 2025, <https://astanatimes.com/2025/11/kazakhstan-russia-sign-landmark-comprehensive-alliance-declaration/>.

40 "Foreign trade turnover of the Republic of Kazakhstan (January–December 2024)," QAZSTAT [Bureau of National Statistics], 17 February 2025, <https://stat.gov.kz/en/industries/economy/foreign-market/publications/315588>.

Kazakhstan. For example, in 2025, Russia's state nuclear corporation Rosatom was selected to construct one of the country's two nuclear power plants, with China National Nuclear Corporation building the second.⁴¹

However, several points remain contentious. Kazakhstan's refusal to support Russia's actions in Ukraine and its formal support of Ukraine's territorial integrity have not been well received in Moscow. Several Russian public figures, such as member of the Duma Konstantin Zatulin and former Duma member Gennadiy Onishchenko, have lashed out at what they perceived as Kazakhstan's inappropriate and ungrateful behaviour, the latter threatening the possibility of "territorial issues."⁴²

Unlike Kazakhstan, Uzbekistan is not a member of the Russian-led organisations, the CSTO and the EAEU, although it has observer status in the EAEU. Since 2022, Uzbekistan has taken no steps toward fully joining these organisations. Tashkent is particularly dismissive of military alignments, meticulously adhering to its Defence Doctrine, which rejects foreign bases on Uzbek territory, participation in military blocs, and involvement in peacekeeping abroad.⁴³ Instead, Uzbekistan prefers to handle Russia bilaterally, and does so pragmatically.

In the bilateral agenda, Uzbekistan carefully emphasises Russia's role as a strategic partner and ally. Russia remains an important economic partner, although China has surpassed Russia as the largest trade partner. In 2024, Uzbekistan's trade with Russia amounted to USD 11.6 billion, whereas that with China amounted to USD 12.5 billion. As a share of total trade, China accounts for 18.9 per cent and Russia for 17.6 per cent.⁴⁴

Mirroring Kazakhstan, Uzbekistan and Russia have signed an agreement for Rosatom to lead construction of a nuclear power plant. Gas imports from Russia have increased over the last couple of years, and are projected to continue to grow.⁴⁵ In the security domain, the two countries adopted a military strategic partnership

41 Tamara Vaal, "Russia's Rosatom, China's CNNC to lead consortiums to build first nuclear power plants in Kazakhstan," *Reuters*, 14 June 2025, www.reuters.com/business/energy/russias-rosatom-lead-consortium-build-first-nuclear-power-plant-kazakhstan-2025-06-14.

42 See Nargis Kassenova, "Kazakhstan–Russia Relations After 2022: Sources of Contention, Points of Pressure," *Central Asia-Caucasus Analyst*, 17 November 2025, https://cacianalyst.org/resources/251117_FT_Kassenova_1-compressed.pdf.

43 Defence Doctrine of the Republic of Uzbekistan, "Oboronnaya doktrina Respubliki Uzbekistan utverzhdena Zakonom Respubliki Uzbekistan, no. ZRU-4589," January 2018. In common parlance, these three rejections are referred to as the "three no's."

44 *Vneshnetorgovyi oborot Respubliki Uzbekistan (za janvar-dekabr 2024 g.)*, Agency of Statistics under the President of the Republic of Uzbekistan, 20 January 2025, https://stat.uz/img/press_reliz_tashi_savdo_rus_yanvar-dekabr_2024_p45347.pdf.

45 Jamshid Aramov, "Russia–Kazakhstan–Uzbekistan Gas Union: The Costs and Benefits for Uzbekistan," *CABAR Asia*, 23 November 2023, <https://cabar.asia/en/russia-kazakhstan-uzbekistan-gas-union-the-costs-and-benefits-for-uzbekistan>.

programme covering the period 2025–2030, which includes 50 unspecified joint military activities.⁴⁶

A particular vulnerability concerns the Uzbek labour migrants who have depended on jobs in Russia. Moscow has long used labour dependency as a weapon against Uzbekistan.⁴⁷ To mitigate reliance on the Russian labour market, the Uzbek government has worked to expand access for its labour migrants to destinations in Europe and Asia.⁴⁸ The combination of Russia's tightened migration rules and increased harassment of Central Asian guest workers after the 2024 Crocus City Hall terrorist attack, allegedly carried out by Tajik citizens, has led to a 50 per cent drop in the number of Uzbek guest workers in Russia, from 1.2 million at the beginning of 2024 to around 700,000 a year later.⁴⁹ Whether this trend will last is uncertain, especially as long-standing migration routes to Russia may pull workers back at a time when Russia's labour demand is growing because of the war.

To some extent, the dynamics in Russia's relations with Kazakhstan and Uzbekistan appear to be shifting. Confronted with relative international isolation, Russia relies on these countries to project an image of itself as supported by a collective of states. In this context, symbolic gestures, such as formal and informal summits of questionable practical significance, are becoming increasingly important to Moscow.⁵⁰

Moreover, positioned at the heart of the Eurasian landmass, Kazakhstan and Uzbekistan play an increasingly significant role in Russia's ambition to redirect its trade links from Europe to Asian markets. As a result, some subtle changes have occurred in the relationship. In the past, Russia provided Central Asia with access to world markets, but international sanctions have made the Central Asian region increasingly important to Russia as a route for both exports and imports. Thus, as a consequence of new trade patterns caused by sanctions, Russia's trade with Central Asia has become increasingly important to compensate for the lack of direct access to Western markets.

This leads to the issue of sanctions, which has emerged as the main dilemma for the two Central Asian states in their manoeuvring between Russia and the

46 "Russia and Uzbekistan Sign Military Strategic Partnership Plan," *Moscow Times*, 22 January 2025, www.themoscowtimes.com/2025/01/22/russia-and-uzbekistan-sign-military-strategic-partnership-plan-a87693/pdf.

47 Author's conversation with an Uzbek expert, Tashkent, April 2025.

48 Sherzod Eraliev, "Shifting Horizons: The Evolving Geography of Uzbek Labor Migration to the European Union," in *Changing Migration Patterns: A Comparative Study on the Movement of people and the Impact for Countries in the Region*, edited by Ninna Mörner, Stockholm: Södertörn University, 2025, pp. 167–174.

49 "V Rossii vpolovinu sokratilos chislo trudovykh migrantov iz Uzbekistana," *Politik.uz*, 21 January 2025, <https://politik.uz/novosti/v-rossii-vpolovinu-sokratilos-chislo-trudovykh-migrantov-iz-uzbekistana>.

50 Farkhod Tolipov, "Russia's Central Asian Underbelly: The Case of Uzbekistan," *Central Asia–Caucasus Analyst*, 28 January 2025, https://cacianalyst.org/resources/241210_FT_Tolipov.pdf.

West. Given the importance of their economic ties with Russia, Kazakhstan and Uzbekistan, as well as the other Central Asian countries, quickly made it clear that they would not join Western sanctions against Russia. But they also communicated that they would not allow Russia to use them to circumvent sanctions. To this effect, their banks, for example, stopped accepting Russian Mir payment cards in late 2022.⁵¹

Still, they pursue the seemingly incompatible objectives of comprehensive cooperation with Russia while simultaneously adhering to the sanctions imposed against it. A 2023 study by researchers from the European Bank for Reconstruction and Development (EBRD) observed an increase in EU exports of goods partially or fully subject to sanctions to Kazakhstan and two other EAEU members, Armenia and Kyrgyzstan. The evidence suggested that these goods were then re-exported onward to Russia.⁵² Gradually, Western officials increased pressure on Kazakhstan to ensure compliance with sanctions.

Some reports further suggest that Russian firms use companies registered in Kazakhstan and Uzbekistan as intermediaries to obtain goods restricted under sanctions.⁵³ As of 2025, a handful of companies from Kazakhstan have been placed under Western sanctions. Due to the strong linkages to major Russian banks and oil companies, Kazakhstan is under pressure following the EU's inclusion of the Kazakh branch of Russia's VTB Bank and the US Treasury Department's sanctioning of Lukoil, a company with extensive operations in Kazakhstan over the past 30 years.⁵⁴ For Uzbekistan, the EU's 16th and 17th sanctions packages included companies based in the country, thereby bringing the total number of EU-sanctioned Uzbek entities to five, according to the leading digital news portal Kun.uz.⁵⁵

Despite deepening cooperation in some areas, Kazakhstan and Uzbekistan are wary of the risks of over-reliance on Russia, and systematically, without confronting Moscow head-on, pursue policies to mitigate vulnerabilities stemming from entrenched dependencies on Russia. In particular, they work with multiple partners to diversify trade and transport routes beyond Russia. Astana and Tashkent

51 Johan Engvall, "Central Asia Moves Beyond Russia," *Current History*, 122, no. 846 (2023), p. 263.

52 Anton Usov, "EBRD Analyses Trade Flows between Russia, Caucasus and Central Asia," European Bank for Reconstruction and Development, 24 February 2023, www.ebrd.com/news/2023/ebrd-analyses-trade-flows-between-russia-caucasus-and-central-asia.html.

53 Ilya Astakhov, "Est dva stula: kak Kazakhstan pomogal Rossii obkhodit sanktsii," *Orda.kz*, 16 February 2023, <https://orda.kz/est-dva-stula-kak-kazakhstan-pomogal-rossii-obhodit-sankczii/>; Rahimbek Abdrahmanov and Kamshat Zhumagulova, "How Kazakhstan Helps Russia Bypass Western Sanctions," *The Diplomat*, 25 October 2023, <https://thediplomat.com/2023/10/how-kazakhstan-helps-russia-bypass-western-sanctions/>.

54 Andrei Matveev, "How U.S. and EU Sanctions Are Rippling Through Central Asia," *The Times of Central Asia*, 24 October 2025, <https://timesca.com/how-u-s-and-eu-sanctions-are-rippling-through-central-asia/>.

55 "Rising tally: Another Uzbek company faces EU sanctions," *Kun.uz*, 22 May 2025, <https://monitor.kun.uz/en/news/2025/05/22/rising-tally-another-uzbek-company-faces-eu-sanctions>.

carefully pursue this objective in parallel with their links to Russia, rather than seeking to substitute them.

The topic of the multitude of treaties and agreements that the Central Asian states tend to sign with Russia merits a short separate discussion. The contemporary history of Central Asia is filled with examples of high-profile agreements, or announced projects, between Russia and the Central Asian states that failed to materialise in practice, despite great initial fanfare and promise. In some cases, these agreements were never implemented, in other cases, they were abandoned, and yet others were gradually undermined from within. Notable examples include hydro-power projects in Kyrgyzstan, Russia's pipeline cooperation with Turkmenistan, the Trans-Caspian gas export agreement, CIS free trade integration, and Russian-led transport corridor initiatives.⁵⁶

Overall, what distinguishes Russia from other external powers in Central Asia is its dual role as both the main security actor and a major potential source of threat. This makes Kazakhstan's and Uzbekistan's relations with Russia particularly delicate, and explains their careful stance vis-à-vis Moscow. Seen from the cautious perspective of the governments of Kazakhstan and Uzbekistan, the cases of Georgia and Ukraine look very different from how they are viewed in Western capitals. Georgia's shift after the 2003 Rose Revolution and Ukraine's turn after the Maidan Revolution are not seen as brave moves to democratise and align with the West. Instead, the common view, if not always spelled out openly, is that their leaders acted recklessly by turning away from Russia without having any security guarantees to rely on.

2.2.2 China

Kazakhstan's strong relationship with China has deepened further since 2022, but is pursued in parallel with its relations to Russia, not as a substitute for them. This is the essence of Tokayev's view of Kazakhstan's foreign policy as a pursuit of "positive balance."⁵⁷ The 2019 permanent (eternal) comprehensive strategic partnership between Kazakhstan and China represents the highest level of the hierarchy of strategic partnerships that Beijing concludes with other countries. This bilateral

56 See for example, Peter Leonard, "Economy and Sanctions Derail Russia's Central Asian Investments," *Eurasianet*, 28 January 2016, <https://eurasianet.org/economy-and-sanctions-derail-russias-central-asian-investments>; Vladimir Socor, "Turkmenistan Delays Russian Pipeline Project and Rejects Russian-Led Gas Cartel," *Eurasia Daily Monitor*, 21 April 2009, <https://jamestown.org/turkmenistan-delays-russian-pipeline-project-and-rejects-russian-led-gas-cartel/>; Marat Shibusov, "Zona svobodnoi trgovli SNG: nuzhna li ona?" *Regnum*, 26 February 2018, <https://regnum.ru/article/2384131>.

57 See Svante E. Cornell, "Kazakhstan's Foreign Policy: Managing the Major Powers," *Central Asia-Caucasus Analyst*, 8 December 2023, www.cacianalyst.org/resources/pdf/231208_FT_Kazpowersb.pdf.

framework facilitates diplomatic coordination and practical cooperation in economy, trade, infrastructure, energy, science and technology, and cultural exchange.⁵⁸ In recent years, the bilateral relationship has advanced further with rising trade and investment volumes and cooperation expanding beyond traditional areas such as hydrocarbons and infrastructure to new sectors, including green energy and the digital economy. Due to the redrawing of international trade routes, Kazakhstan is also taking on a more central role in transit and logistics within China's Belt and Road Initiative (BRI).⁵⁹

Trade figures between Kazakhstan and China vary substantially depending on whether Kazakh or Chinese statistics are consulted. According to Chinese customs data, bilateral trade turnover amounted to USD 43.8 billion in 2024, of which USD 28 billion comprised Chinese exports to Kazakhstan. However, according to Kazakhstan's Bureau of National Statistics, trade turnover was about USD 30 billion, disaggregated in largely equivalent shares of imports and exports. This leaves a gap of approximately USD 14 billion unaccounted for. A possible explanation is different accounting methods. According to Kazakh sources, Chinese goods that are shipped to Uzbekistan or Turkmenistan via Kazakhstan are recorded as exports to Kazakhstan.⁶⁰ Other factors that may affect this large discrepancy include the persistence of corrupt customs schemes and smuggling. The discrepancy has existed for well over a decade⁶¹ and cannot be explained by Kazakhstan being used as an intermediary for goods shipped to Russia to bypass sanctions.

The bilateral relationship between Uzbekistan and China, updated in September 2022 to an "all-weather comprehensive strategic partnership of a new era," covers the full spectrum from economic cooperation to cultural exchange and security. It is particularly important for Uzbekistan's economic development. China is Uzbekistan's largest trade partner, but there is a large deficit in favour of China. According to Uzbekistan's official statistics, exports to China totalled slightly over

58 For both sides of the debate on the agreement, see Elya Altynsarina, "Kazakhstan and China: Strengthening friendship and partnership in a new era," *Astana Times*, 15 September 2019, <https://astanatimes.com/2019/09/kazakhstan-and-china-strengthening-friendship-and-partnership-in-a-new-era>; "Xi Jinping Holds Talks with President Kassym-Jomart Tokayev of Kazakhstan. The Two Heads of State Decide to Develop China–Kazakhstan Permanent Comprehensive Strategic Partnership," Embassy of the People's Republic of China in the Republic of the Union of Myanmar, 11 September 2019, https://mm.china-embassy.gov.cn/eng/zgxw/201909/t20190916_1396385.htm.

59 Gao Yingshi, "China–Kazakhstan Economic Cooperation Paving Way for Next Golden Thirty Years," *Astana Times*, 2 July 2024, <https://astanatimes.com/2024/07/china-kazakhstan-economic-cooperation-paving-way-for-next-golden-thirty-years>.

60 "Kazakhstan–China Trade Figures Reveal Discrepancy," *Orda.kz*, 6 March 2025, <https://en.orda.kz/kazakhstan-china-trade-figures-reveal-discrepancy-5360/>.

61 Olga Ibraeva, "A Dive Into Kazakhstan–China Trade Gap," *Orda.kz*, 6 March 2025, <https://en.orda.kz/a-dive-into-kazakhstan-china-trade-gap-5368/>.

USD 2 billion, while imports amounted to approximately USD 10.4 billion.⁶² China is also the leading foreign investor in Uzbekistan.⁶³

In its quest to improve its integration into east–west transport corridors, Uzbekistan is a keen supporter of China’s BRI and the revival of transcontinental trade along a modern Silk Road. For Uzbekistan, the key component is the China–Kyrgyzstan–Uzbekistan (CKU) railway. Construction of this megaproject, which had been under discussion since the 1990s, finally began in 2025. The 523-kilometre railway is expected to carry up to 15 million tonnes of cargo and is expected to decrease transport time between China and Europe by 30 per cent compared to existing routes. The projected cost of the CKU railway is USD 8 billion. Approximately 80 per cent of the railway route passes through mountains and requires 120 kilometres of tunnels and 26 kilometres of bridges. The CKU will strengthen Uzbekistan’s position as a transit hub between East Asia and Europe and is therefore a key part of Uzbekistan’s ambition to reach new markets.⁶⁴ Moreover, the CKU line expands China–Central Asia railway connectivity beyond Kazakhstan, which currently holds a monopoly on direct railway connections to China.

While Kazakhstan and Uzbekistan perceive economic ties with China as a large opportunity, the relationship nevertheless needs to be handled carefully. There are historically rooted fears of China in Central Asian societies. From time to time, these fears are galvanised by media narratives about the potential mass influx of Chinese migrants and the environmental damage caused by China’s industrial activities in the region. In Kazakhstan, popular concerns have been behind a large number of small and large anti-Chinese protests. In Uzbekistan, the narrative that China is taking over the country and exploiting its land has fostered negative public perceptions.⁶⁵ Thus, as Bradley Jardine and Edward Lemon put it, “China has an image problem.”⁶⁶

62 *Vneshnetorgovyi oborot Respubliki Uzbekistan (za janvar-dekabr 2024 g.)*, Agency of Statistics under the President of the Republic of Uzbekistan, 20 January 2025, https://stat.uz/img/press_reliz_tashi_savdo_rus_yanvar-dekabr_2024_p45347.pdf.

63 “V Uzbekistane 39,9% inostrannykh vlozhenii prikhoditsya na dolyu Kitaya,” *Kun.uz*, 30 October 2025, <https://kun.uz/ru/news/2025/10/30/v-uzbekistane-399-inostrannyx-vlojyenyi-prihoditsya-na-dolyu-kitaya>.

64 Syed Fazl-e-Haider, “China–Kyrgyzstan–Uzbekistan Railway Emerges as Competitor to Kazakhstan’s Rail Network,” *Eurasia Daily Monitor*, 8 April 2025, <https://jamestown.org/program/china-kyrgyzstan-uzbekistan-railway-emerges-as-competitor-to-kazakhstans-rail-network/>; “The New Era of Central Asia–China Cooperation: The Case of the China–Kyrgyzstan–Uzbekistan Railway,” *Eurasian Research Institute*, undated, www.eurasian-research.org/publication/the-new-era-of-central-asia-china-cooperation-the-case-of-the-china-kyrgyzstan-uzbekistan-railway/.

65 Jessica Neafie, Frank Maracchione, Rashid Gabdulhakov, Khiradmand Sheraliev, and Islam Supyaldiyarov, “Beyond the Silk Road: Navigating the Complexities of Central Asia’s Public Opinion on China,” *Central Asia Barometer*, November 2024, <https://ca-barometer.org/en/publications/beyond-the-silk-road-navigating-the-complexities-of-central-asias-public-opinion-on-china>.

66 Bradley Jardine and Edward Lemon, *Backlash: China’s Struggle for Influence in Central Asia*, London: Hurst, 2025, p. 18.

To address lingering negative perceptions in Central Asia, China has adapted by localising its workforce, expanding its media presence, and investing in technical training. The overall trend is that China is shifting from financing large-scale infrastructure projects to a focus on creating value-added industries in manufacturing, mining, and agriculture.⁶⁷

Unlike Kyrgyzstan and Tajikistan, which have amassed significant external debts to China for infrastructure projects, Kazakhstan has, thanks to its wealth, been able to finance large-scale infrastructure projects largely on its own.⁶⁸ Uzbekistan has likewise been careful not to amass too large an external debt to China. Of a total external debt of USD 25.9 billion in 2023, China held USD 3.8 billion, equivalent to around 15 per cent of Uzbekistan's external debt.⁶⁹

It has been common among analysts to assume a division of labour between China and Russia in Central Asia. The former expands its economic presence while leaving security to the latter. However, China has significant security interests in Central Asia, linked to its priority of securing stability in Xinjiang, which serves as its outpost towards Central Asia. By establishing trade links with Central Asia, Beijing hopes to strengthen prosperity and thereby stability in Xinjiang, and by extension in Central Asia.⁷⁰

The issue of Xinjiang is also at the core of the Shanghai Cooperation Organization (SCO). The SCO, of which Kazakhstan and Uzbekistan are founding members, focuses primarily on security issues to counter “the three evils,” terrorism, separatism, and extremism. Combatting these evils is also a priority for Kazakhstan and Uzbekistan. The SCO's Regional Anti-Terrorist Structure (RATS) has its headquarters in Tashkent, and the Uzbek president has called for enhancing RATS's capacity for both preventive and rapid response to emerging security threats.⁷¹

Additionally, China's growing security presence in Central Asia is taking shape through its Digital Silk Road Initiative. This form of high-tech diplomacy has led to the proliferation of Chinese-made surveillance technology in the region. For example, Beijing has both provided Kazakhstan with surveillance technology to monitor

67 Jardine and Lemon, *Backlash*, p. 234.

68 China only holds around 6 per cent of Kazakhstan's total external debt. See Nigora Umarova, “Kazakhstan's Foreign Debt Hits All-Time High at \$170.5 bln,” *Kursiv*, 11 July 2025, <https://uz.kursiv.media/en/2025-07-11/kazakhstans-foreign-debt-hits-all-time-high-at-170-5-bl/>.

69 This is less than a third of the external debt owed to the Asian Development Bank and World Bank combined, see “Uzbekistan's state debt nears \$31.5 billion,” *Kun.uz*, 11 August 2023, <https://kun.uz/en/news/2023/11/08/uzbekistans-state-debt-nears-315-billion>.

70 Raffaello Pantucci, “A Steady Embrace: China in Central Asia and the Caucasus,” *Central Asia–Caucasus Analyst*, 18 November 2021, www.cacianalyst.org/resources/Pantucci.pdf.

71 “Speech of the President of Uzbekistan Shavkat Mirziyoyev at the meeting of the Council of Heads of the Member-States of the Shanghai Cooperation Organization,” *President.uz*, 16 September 2022, <https://president.uz/en/lists/view/5542>.

unauthorised gatherings and delivered buses equipped with facial-recognition systems to local police forces in Uzbekistan.⁷²

Finally, China frames its ambition as an agenda-setter in global security, through its Global Security Initiative proposed by Xi Jinping in April 2022, as a non-bloc alternative. This dovetails with Kazakhstan and Uzbekistan's rejection of bloc confrontations.⁷³ Thus, the advantage of China's security policy proposals is that they offer cooperation without military alliance commitments. Moreover, in the wake of Russia's aggression in Ukraine, Astana and Tashkent have carefully ensured Beijing's official reaffirmation of their sovereignty and national independence, thereby sending a subtle signal to Moscow.⁷⁴

2.2.3 Turkey

Despite China's growing importance, Kazakhstan and Uzbekistan have no desire to replace the former Russian hegemony with a future Chinese hegemony. Thus, Astana and Tashkent are proceeding to expand collaboration with other actors. For Kazakhstan, a country whose security is intimately linked to an unpredictable and revisionist Russia, discreetly diversifying security cooperation becomes particularly important. Militarily non-aligned Uzbekistan is also seeking to broaden its security cooperation.

Turkey is emerging as the primary actor filling this demand. Turkey's emergence as an additional security provider in Central Asia can be traced to the developments in the South Caucasus and its role in supporting Azerbaijan in the conflict with Armenia over Nagorno-Karabakh. It began with Turkey's military support for Azerbaijan in the Second Karabakh War in 2020, continued with their 2021 defence treaty, and culminated in Azerbaijan's 2023 restoration of full control of Nagorno-Karabakh, followed by the withdrawal of Russian peacekeepers. Turkey's ability to militarily insert itself in the South Caucasus did not go unnoticed on the other side of the Caspian. It demonstrated to the Turkic states in Central Asia that cooperation with Ankara can have genuine security benefits.⁷⁵

72 Bradley Jardine and Edward Lemon, *Backlash: China's Struggle for Influence in Central Asia*, London: Hurst, 2025, p. 184.

73 "Full Text: Chinese President Xi Jinping's keynote speech at the opening ceremony of BFA annual conference 2022," *Xinhua*, 21 April 2022, https://english.www.gov.cn/news/topnews/202204/21/content_WS62616c3bc6d02e5335329c22.html.

74 "President Xi Jinping Makes a State Visit to the Republic of Kazakhstan," Ministry of Foreign Affairs of the People's Republic of China, 15 September 2022, www.mfa.gov.cn/mfa_eng/zy/jj/2022/cxshgsfwhw/202209/t20220915_10766191.html.

75 Johan Engvall, "Eurasia: Between Russia and Turkey," *The National Interest*, 27 May 2024, <https://nationalinterest.org/blog/silk-road-rivalries/eurasia-between-russia-and-turkey-211159>.

In May 2022, Kazakhstan and Turkey upgraded their relationship to an enhanced strategic partnership; the following month, Uzbekistan and Turkey signed a comprehensive strategic partnership. Both states concluded separate agreements with Turkey to develop bilateral military cooperation, including military education, joint exercises, intelligence-sharing, and defence-industry cooperation.⁷⁶ Notwithstanding its status as a member of the CSTO, Kazakhstan regularly sends military officers to Turkey, a NATO country, for education.⁷⁷

Both Kazakhstan and Uzbekistan have revised their military doctrines since the onset of the full-scale war in Ukraine, while Turkey's defence industry has attracted attention as a potential alternative source of military modernisation for countries highly dependent on Russian arms deliveries. Astana and Ankara have signed an agreement to jointly produce ANKA drones in Kazakhstan.⁷⁸ There is scarce publicly available information on the exact nature of Uzbekistan's defence industrial cooperation with Turkey. Media reporting suggests that Uzbekistan wants to acquire Turkish drones, but there have not as yet been any confirmations that deliveries have begun.⁷⁹ The same applies to reporting on Turkey transferring some NATO-calibre ammunition production to Uzbekistan.⁸⁰

Finally, Turkey is increasing its footprint in the Caspian Sea. In 2023, Turkey agreed to the production of various naval vessels for the Kazakh navy, adding to its previous role in strengthening the naval capabilities of Azerbaijan and Turkmenistan, the other two Turkic littoral states.⁸¹

Beyond security, Turkey is among the five largest trading partners of Kazakhstan and Uzbekistan, albeit lagging significantly behind China and Russia. Turkey is a top-tier foreign investor in Uzbekistan and a significant investor in Kazakhstan as well. Turkish companies have a well-established presence in both countries, especially in the construction sector.

76 "Turkey, Uzbekistan set for intelligence sharing, joint military drills, defense cooperation," *Nordic Monitor*, 4 July 2022, <https://nordicmonitor.com/2022/07/turkey-uzbekistan-set-for-intelligence-sharing-joint-military-drills-defense-cooperation/>.

77 Evgeniy Korenev, "Zachem Turtsiya narashchivaet voennoe vzaimodeistvie s Kazakhstanom," *Evrasiya Ekspert*, 6 September 2024, <https://eurasia.expert/zachem-turtsiya-narashchivaet-voennoe-vzaimodeystvie-s-kazakhstanom/>.

78 Melda Dogan, "Türkiye to produce Anka drones in Kazakhstan," *TRT World*, 11 May 2022, www.trtworld.com/article/12788560.

79 "Uzbekistan ukreplyaet oboronosposobnost s pomoshchyu turetskikh dronov ANKA," *UZ Daily*, 30 January 2025, www.uzdaily.uz/ru/uzbekistan-ukrepliaet-oboronosposobnost-s-pomoshchyu-turetskikh-dronov-anka/.

80 Yusuf Ulucam, "Türkiye, Uzbekistan boost defense ties at Eurosatory 2024," *Türkiye Today*, 20 June 2024, www.turkiyetoday.com/turkiye/turkiye-uzbekistan-boost-defense-ties-at-eurosatory-2024-22513.

81 Syed Fazl-e-Haider, "Turkey-backed Turkic States Challenge Russia's Hegemony in the Caspian Sea," *Central Asia–Caucasus Analyst*, 8 October 2025, www.cacianalyst.org/publications/analytical-articles/item/13896-turkey-backed-turkic-states-challenge-russias-hegemony-in-the-caspian-sea.html.

Turkey is critical to Kazakhstan's strategic priority to become the logistics hub of Eurasian connectivity. To elevate east–west trade through the Middle Corridor, Kazakhstan and Turkey are engaging both bilaterally and through a trilateral Turkey–Azerbaijan–Kazakhstan format. In 2022, the three states agreed on a roadmap for improving the capacity and effectiveness of the corridor until 2027. For resource-rich Kazakhstan, where energy exports account for close to 60 per cent of its exports, Turkey's location makes it crucial both as a gas and oil hub and as a gateway to Western energy markets. To reduce its near-complete reliance on pipelines through Russian territory, Kazakhstan is trying to redirect more of its energy supplies to Europe across the Caspian Sea and then tap into the Baku–Tbilisi–Ceyhan pipeline.⁸²

Lastly, Kazakhstan and Uzbekistan are actively participating in advancing the increasingly ambitious agenda of the Organization of Turkic States (OTS). The member states, Turkey, Azerbaijan, Kazakhstan, Kyrgyzstan, and Uzbekistan, have adopted an ambitious Turkic World Vision 2040.⁸³ The goal is to turn the organisation into a Turkic-speaking equivalent of the EU, granting free movement of commodities, capital, services, technologies, and people among the member states. Several recent initiatives, such as the creation of a Turkic Investment Bank and the adoption of the Charter of the Turkic World, have been spearheaded by Kazakhstan and Uzbekistan, respectively.⁸⁴

In the wake of the 12th OTS Summit in October 2025, President Erdoğan signed a decree allowing citizens of Turkic-speaking countries to live and work freely in Turkey without complex work permit procedures.⁸⁵ Turkey's opening coincides with, and may partly offset, Russia restricting access to its market for Central Asian workers.

82 Johan Engvall, "The Convergence of the South Caucasus and Central Asia: An Opportunity for a New EU Partnership," *Central Asia–Caucasus Analyst*, 22 January 2025, https://cacianalyst.org/resources/240122_FT_Engvall.pdf.

83 Organization of Turkic States, *Turkic World Vision 2040*, 12 November 2021, <https://turkicstates.org/u/d/haberler/turkic-world-vision-2040-2396-97.pdf>.

84 Zhanna Shayakhmetova, "Organization of Turkic States Strengthens Unity and Cooperation Among Turkic Nations," *Astana Times*, 2 August 2024, <https://astanatimes.com/2024/08/organization-of-turkic-states-strengthens-unity-and-cooperation-among-turkic-nations/>; "Address by the President of the Republic of Uzbekistan H.E. Shavkat Mirziyoyev at the Tenth Summit of the Heads of State of the Organization of Turkic States," Embassy of the Republic of Uzbekistan to the Republic of Kazakhstan, 11 March 2023, www.uzembassy.kz/en/article/address-by-the-president-of-the-republic-of-uzbekistan-he-shavkat-mirziyoyev-at-the-tenth-summit-of-the-heads-of-state-of-the-organization-of-turkic-states.

85 Anvar Abdullaev, "Turkey simplifies employment procedures for citizens of Turkic states," *24.kg*, 14 October 2025, https://24.kg/english/347159_Turkey/.

2.2.4 The European Union

The EU has remained Kazakhstan's largest trade partner and its largest foreign investor since the mid-2010s. In 2024, Kazakhstan's trade with EU countries reached approximately USD 50 billion, of which more than USD 38 billion were exports from Kazakhstan. Foreign direct investments from EU countries exceeded USD 200 billion from 2005 to 2024, equivalent to nearly 50 per cent of the total gross foreign direct investment during the past 20 years.⁸⁶

The energy sector dominates the economic exchange, with Kazakhstan exporting large volumes primarily to Italy, as well as to the Netherlands, France, and Greece. In recent years, Kazakhstan has leveraged its natural resource endowment to attract close attention from the EU as well as individual European countries. As part of the focus on the green transition, Kazakhstan and the EU signed a strategic partnership in 2022 on sustainable raw materials, batteries, and renewable hydrogen.⁸⁷ Connectivity has strengthened as a result of both sides' interest in the diversification of trade and transport links.

Kazakhstan's political interaction with the EU and its member states has been considerably more advanced than that of the other Central Asian states. It was the first regional country to sign an Enhanced Partnership and Cooperation Agreement (EPCA) with the EU in December 2015 and has engaged with other European-based organisations in a much more sustained manner than its neighbours.⁸⁸

Uzbekistan's relations with Europe have improved dramatically since Mirziyoyev took charge. A decade ago, the relations between Uzbekistan and international financial institutions, such as the European Bank for Reconstruction and Development (EBRD), were frozen. By 2025, Uzbekistan had become the largest recipient of the EBRD.⁸⁹ According to a compilation by Uzbekistan's Centre for Economic Research and Reform, the share of EU member states in Uzbekistan's foreign trade amounted to 9.7 per cent in 2024 (6.3 per cent in exports and 12 per cent in imports).⁹⁰

86 "Kazakhstan and EU Strengthen Strategic Partnership," *Kazakhstan Today*, 31 March 2025, www.kt.kz/eng/international_affair/kazakhstan_and_eu_strengthen_strategic_partnership_1377976072.html.

87 "COP27: European Union concludes a strategic partnership with Kazakhstan on raw materials, batteries and renewable hydrogen," *European External Action Service*, 8 November 2022, www.eeas.europa.eu/delegations/kazakhstan/cop27-european-union-concludes-strategic-partnership-kazakhstan-raw-materials-batteries-and_en.

88 Svante E. Cornell and Johan Engvall, *Kazakhstan in Europe: Why Not?* Washington, DC: Central Asia-Caucasus Institute, 2017.

89 Anton Usov, "EBRD sets an investment record in Central Asia," European Bank for Reconstruction and Development, 16 January 2025, www.ebrd.com/home/news-and-events/news/2025/EBRD-sets-an-investment-record-in-Central-Asia.html#.

90 "Infografika: Torgovo-ekonomicheskoe i investitsionnoe sotrudnichestvo Uzbekistana s stranami ES," Center for Economic Research and Reform, undated, www.uzembassy.org.tr/news/6636.

The bilateral political relationship between Uzbekistan and the EU has gained momentum. In 2021, Uzbekistan became eligible for the EU's GSP+ arrangement, which enables it to export a broader range of goods to the EU market at reduced tariffs. In October 2025, Uzbekistan signed its own EPCA with the EU, a decade after Kazakhstan. When ratified, the EPCA will expand cooperation across more than 20 policy areas and provide a more durable and institutionalised partnership.⁹¹

Overall, Russia's full-scale invasion of Ukraine led the EU to acknowledge Central Asia's geostrategic importance. In 2022, both European Council President Charles Michel and the EU's High Representative for Foreign Affairs and Security Policy, Josep Borell, visited the region, trying to convince the regional states to distance themselves from Russia. As the dialogue deepened, the EU has gradually taken a more pragmatic stance, accepting the basic foreign policy calculations of the Central Asian states. The EU's increasingly proactive position towards Central Asia culminated in the first-ever summit between leaders of the EU and the five countries of Central Asia in Samarkand, Uzbekistan, in April 2025. The summit upgraded EU–Central Asia relations to the level of a strategic partnership.⁹²

Both Kazakhstan and Uzbekistan primarily view the EU as a source of economic diversification and investment. They want EU investment in rare-earth and critical minerals as well as expertise in agriculture and renewable energy. Rather than solely exporting raw materials, they seek to move up in the value production chain through technology transfer, innovation, and local manufacturing. For Kazakhstan and Uzbekistan, eager to reap the maximum reward of the increased attention that European leaders pay to Central Asia, the main source of frustration is the slow pace of European decision-making, especially compared to China.⁹³

The EU and Central Asia have a shared interest in developing the Trans-Caspian Trade Route and its transport corridor, known as the Middle Corridor, as an alternative channel for trade between Europe and Asia, bypassing Russia. The Middle Corridor offers Kazakhstan and Uzbekistan a window to Europe, and a way to balance transport and infrastructural dependencies on Russia dating back to Soviet times. The Middle Corridor reflects their vision of intercontinental trade between China and Europe. It is thus a link between the EU's Global Gateway Initiative (GGI) and China's BRI.

91 "Joint Statement on the occasion of the signing of the EU–Uzbekistan Enhanced Partnership and Cooperation Agreement (EPCA) between the European Union and its Member States and the Republic of Uzbekistan," European Council, 24 October 2025, www.consilium.europa.eu/en/press/press-releases/2025/10/24/joint-statement-on-the-occasion-of-the-signing-of-the-eu-uzbekistan-enhanced-partnership-and-cooperation-agreement-epca-between-the-european-union-and-its-member-states-and-the-republic-of-uzbekistan/; Adkhamjon Janobiddinov, "Uzbekistan–EU Relations Enter a New Era with the Signing of the Enhanced Partnership and Cooperation Agreement," *Special Eurasia*, 23 October 2025, www.specialeurasia.com/2025/10/23/uzbekistan-eu-epca/.

92 Mamuka Tsereteli, "Is the EU Beating the U.S. in Central Asia?" *The National Interest*, 1 May 2025, <https://nationalinterest.org/blog/silk-road-rivalries/is-the-eu-beating-the-u-s-in-central-asia>.

93 Author's conversations with Uzbek experts, April 2025, and Kazakh expert, June 2025.

In early 2024, European investors committed EUR 10 billion in the form of low interest loans and grants for developing the Middle Corridor with Kazakhstan as a key node. Although the EBRD estimates that a total investment of EUR 18.5 billion is required for a sustainable Middle Corridor, the implementation of this investment would mark a significant step toward strengthening trade, transport, and connectivity. During the 2025 EU–Central Asia summit, the EU pledged to mobilise a EUR 12 billion investment package for Central Asia, of which approximately EUR 3 billion was earmarked for transport connections.⁹⁴

Besides the EU, individual European states have raised their profile in Central Asian affairs. Since 2023, the highest political leadership of France, Germany, and Italy has visited Kazakhstan and Uzbekistan, and the United Kingdom’s Foreign Secretary toured the countries in spring 2025. These visits resulted in substantial investment frameworks as well as specific deals in energy, minerals, green technology, and infrastructure.⁹⁵

2.2.5 The United States

The relationship between the United States and Kazakhstan has been the bilateral anchor for the US in Central Asia. Upon independence, Kazakhstan held the world’s fourth-largest nuclear arsenal, accounting for more nuclear weapons than France, the United Kingdom, and China combined. This drew substantial attention from the US for whom non-proliferation in the post-Soviet region became a key foreign policy priority. Kazakhstan’s decision to voluntarily give up its nuclear arsenal and shut down the Semipalatinsk test site was implemented in close cooperation with the US. The decision earned the country international goodwill.⁹⁶

Another prominent goal was supporting American oil companies involved in developing Kazakhstan’s vast hydrocarbon resources.⁹⁷ American investments in this

94 Reid Standish, Rikard Jozwiak and Mukhtar Senggirbay, “EU Readies New Trade Routes— And A Challenge To Beijing And Moscow— At Luxembourg Summit,” *RFE/RL*, 20 October 2025, www.rferl.org/a/eu-china-central-asia-caucasus-russia-middle-corridor-global-gateway/33562604.html; “Joint press release on the EU–Central Asia Summit,” *EU Commission Press Release*, 4 April 2025, https://ec.europa.eu/commission/presscorner/detail/mt/ip_25_983.

95 See, for example, Lidia Gibadlo, Marcin Poplawski, “Acquiring resources and legitimizing the partnership: Scholz’s visit to Central Asia,” *OSW*, 20 September 2024, www.osw.waw.pl/en/publikacje/analyses/2024-09-20/acquiring-resources-and-legitimising-partnership-scholz-visit-to-sadokat-jalolova; “Uzbekistan and France Sign \$6.5 Billion Partnership Agreements,” *The Times of Central Asia*, 13 March 2025, <https://timesca.com/uzbekistan-and-france-sign-e6-5-billion-partnership-agreements/>; “Deals worth €7 bn signed during Meloni’s visits to Uzbekistan and Kazakhstan,” *Euronews*, 30 May 2025, www.euronews.com/my-europe/2025/05/30/italy-and-kazakhstan-sign-4bn-set-of-deals-during-meloni-visit.

96 Nursultan Nazarbayev, *Era nezavisimosti*, Almaty: Kazakparat, 2017, p. 97.

97 Ariel Cohen, *Kazakhstan: The Road to Independence. Energy policy and the Birth of a Nation*, Washington, DC: Central Asia–Caucasus Institute, 2008.

sector ensured the US a prominent role in Kazakhstan's economic development. By 2025, American investments in Kazakhstan had surpassed USD 100 billion. Whereas overall US trade with Central Asia remains modest, US–Kazakhstan trade had doubled in recent years, approaching USD 5 billion. Notably, Kazakhstan supplies approximately 25 per cent of the US's uranium needs.⁹⁸

Compared to Kazakhstan, Uzbekistan's relations with the US have fluctuated more. The relationship has prioritised security issues; during “the war on terror,” the US largely saw Central Asia as a corridor for its operations in Afghanistan, with less focus on developing economic ties.⁹⁹ As part of the military operation in Afghanistan, Uzbekistan hosted a US military base between 2001 and 2005. Trust in the US took a hit following the chaotic withdrawal of US troops from Afghanistan and the immediate return to power of the Taliban.

The subsequent lack of perceived interest in Central Asia shown by the Biden administration reinforced Uzbek perceptions that the US always links Central Asia and Uzbekistan to something else, whether Afghanistan, as an extension of other powers, namely China and Russia, or in relation to the Russia–Ukraine war. As noted by Uzbek experts, this perception of the US has had detrimental consequences for building predictable long-term relations.¹⁰⁰

Like the EU, the US has traditionally applied a largely normative approach to Central Asia. US advancement of economic and security interests normally comes with demands for political reforms. Among the political leaders of Kazakhstan and Uzbekistan, US-led democracy promotion has been associated with attempts to undermine governments and foster regime change. From their perspectives, developments in countries such as Georgia and Ukraine serve as cautionary examples, justifying their own highly centralised systems of political power. Thus, while they are adherent followers of certain core principles of the rules-based international order, including sovereignty, territorial integrity, and the supremacy of international law in global politics, they shun the normative dimensions of democracy and human rights promotion that they associate with the broader concept of the US-led liberal international order.

98 “The Head of State takes part in the ‘Central Asia–United States’ Summit,” *Akorda.kz*, 7 November 2025, www.akorda.kz/en/the-head-of-state-takes-part-in-the-central-asia-united-states-summit-7103952. Kazakhstan holds 40 per cent of the world's uranium reserves. Together, Kazakhstan and Uzbekistan control more than half of global supply of uranium.

99 The major exception being the decades-long joint venture between Uzbekistan's UzAvtoanoat and General Motors, which has led to the production of five million Chevrolet vehicles in Uzbekistan. “UzAuto Motors vypustil 5-millionnyi avtomobil,” *Autostrada.uz*, 25 June 2025, www.autostrada.uz/5-mln/.

100 Author's conversation with an Uzbek expert, Tashkent April 2025. While the highest-level EU representatives visited Central Asia after Russia's full-scale invasion of Ukraine, the US kept its engagement at the level of the Assistant Secretary of State throughout 2022. In February 2023, however, Secretary of State Antony Blinken visited the region for a series of meetings with top officials from all five states.

Against this backdrop, the return of Donald Trump as President has opened new opportunities. In Uzbekistan, this is both due to the perception that “Republicans are easier to work with” and because “Trump is business-minded.”¹⁰¹ Kazakhstan shares this view. Addressing Trump during the US–Central Asia summit in the White House on 6 November 2025, President Tokayev said: “You are the great leader. . . sent by heaven to bring common sense and traditions that we all share and value back into United States policy.”¹⁰²

The US–Central Asia summit, held at the initiative of the US President, signalled a potential new era in the country’s engagement with Central Asia.¹⁰³ With all Central Asian presidents invited, the event represented a major diplomatic success for the entire region. The event underscored that, in terms of Western engagement, nothing can substitute for the US. Being courted by Washington has elevated the international standing of the Central Asian leaders and sends a far stronger signal to China and Russia than the EU can.¹⁰⁴

The outcomes of the visit were significant for both Kazakhstan and Uzbekistan. For instance, Uzbekistan Airways signed a final deal with Boeing for the purchase of 22 Boeing 787 Dreamliner aircraft at an estimated value of over USD 8.5 billion.¹⁰⁵ It represents the largest-ever commercial aircraft deal in Central Asia and fits into Uzbekistan’s strategic priority of turning Tashkent into a transit hub for air connectivity.¹⁰⁶ Besides aviation, Uzbekistan and the US signed economic agreements in rare earth metals, water management, and agriculture for the next decade.

In turn, Kazakhstan and the US expanded on their enhanced strategic partnership by signing new corporate agreements worth around USD 17 billion. Among the deals announced were large orders in airline and railway communications, as well as an agreement for the US company Cove Capital to take a 70 per cent stake

101 Author’s conversations with an Uzbek expert and an Uzbek politician, Tashkent, April 2025.

102 “President Trump Participates in a Dinner with Central Asian Countries, *The White House YouTube Channel*, 7 November 2025, www.youtube.com/watch?v=xr8czDU76Fs.

103 A first such meeting had been convened in 2023 under the Biden administration, but it was held in New York on the sidelines of the 78th session of the UN General Assembly.

104 Temur Umarov, “How Serious Is the Rapprochement Between the United States and Central Asia?” *Carnegie Politika*, 11 November 2025, <https://carnegieendowment.org/russia- Eurasia/politika/2025/11/trump-central-asia-new-deals?lang=en>.

105 “Commercial Deal Zone Announcements,” US Department of Commerce, 6 November 2025, https://trade.gov/sites/default/files/2025-11/C5_1_Commercial_Deal_Zone_Announcements.pdf.

106 Development Strategy Center, *Uzbekistan: Unlocking Economic and Investment Potential*, Tashkent: Development Strategy Center, 2025; Rushana Aliakbarova, “Trump praises ‘great deal’ as Uzbekistan purchases Boeing Dreamliners,” *Euronews*, 23 September 2025, www.euronews.com/business/2025/09/23/trump-praises-great-deal-as-uzbekistan-purchases-boeing-dreamliners; Vagit Ismailov, “Uzbekistan Begins Construction of New International Airport Near Tashkent,” *The Times of Central Asia*, 17 October 2025, <https://timesca.com/uzbekistan-begins-construction-of-new-international-airport-near-tashkent/>.

in developing one of the largest untapped tungsten resources in the world.¹⁰⁷ In a new diplomatic move, Kazakhstan formally agreed to join the Abraham Accords, the agreements initiated during the first Trump administration in 2020 to normalise relations between Israel and several Arab countries, marking yet another step in Astana's multi-vector diplomacy. Kazakhstan will be the first country to join the Abraham Accords since the start of the war in Gaza.

Thus, Trump has shifted US bilateral and regional engagement with Central Asian countries from dialogue to dealmaking. This makes the Trump administration an ideal partner for Kazakhstan and Uzbekistan. As Temur Umarov notes: "Business interests can be used to attract Washington's attention, and there is no longer any need for demonstrative distancing from Russia and commitment to democratic reforms."¹⁰⁸

As Trump has placed American business interests at the forefront of US foreign policy, Central Asian leaders have enthusiastically sought to engage US companies in sectors including critical minerals, infrastructure, energy transport corridors, renewable power, and digital technologies.¹⁰⁹ While these items were also on the agenda under the Biden administration, Trump's transactional approach has been decisive. These sectors connect US strategic priorities with the Central Asian countries' modernisation agenda, thereby aligning their respective national interests.¹¹⁰ President Trump further announced unspecified agreements for the supply of US military equipment, addressing Central Asian goals to modernise their armed forces.

Ultimately, it remains to be seen whether Washington will be prepared to move beyond economic deals and support Kazakhstan and Uzbekistan in developing the infrastructure needed for their long-term economic modernisation. Likely addressing concerns about one-off deals at the expense of sustained engagement, Uzbek President Mirziyoyev proposed creating several joint institutions to ensure dialogue and effective coordination between the US and Central Asian states. For instance, in the critical minerals sector, he argued for continuous coordination across exploration, extraction, processing and supply-chain integration.¹¹¹

In the end, Trump's unpredictability, combined with the growing tendency that US policy shifts with each new administration, calls for caution regarding the

107 "Commercial Deal Zone Announcements," US Department of Commerce, 6 November 2025, https://trade.gov/sites/default/files/2025-11/C5_1_Commercial_Deal_Zone_Announcements.pdf.

108 Temur Umarov, "Why is Central Asia Buying Trump's Attention?" *Carnegie Politika*, 9 October 2025, <https://carnegieendowment.org/russia-eurasia/politika/2025/10/central-asia-trump-approach?lang=en¢er=russia-eurasia>.

109 Yevgeniya Mikhailidi, "C5+1 moment: Can America match China's power in Central Asia?" *Daily Sabah*, 7 November 2025, www.dailysabah.com/opinion/op-ed/c51-moment-can-america-match-chinas-power-in-central-asia.

110 "The US–Central Asia summit: The end of the beginning," *Eurasianet*, 7 November 2025, <https://eurasianet.org/the-us-central-asia-summit-the-end-of-the-beginning>.

111 "Prezident Uzbekistana prizval k dalneishemu rasshireniyu partnerstva v formate 'C5+1'," *President.uz*, 6 November 2025, <https://president.uz/ru/lists/view/8635>.

US's reliability as a partner. As Temur Umarov describes, the prevailing regional view is that "US leaders come and go, but Russia does not change."¹¹²

2.2.6 Other partners

Besides the previously mentioned external partners, there is a flurry of old and new partners vying for a presence in Central Asia. Japan and South Korea have been two of the most reliable long-term partners for both Kazakhstan and Uzbekistan. In terms of trade, South Korea usually ranks as the fifth-largest trade partner for both countries and a significant source of investment.¹¹³ The trend is one of expanding trade and investment ties. According to Kazakhstan's ambassador to South Korea, the country was the third largest foreign investor in Kazakhstan in 2024. Furthermore, South Korea's early investments in Uzbekistan's automobile industry represent a model case of the type of industrial partnerships that Tashkent seeks to advance. It has combined local production with technology transfer, and increased value-added by targeting exports to regional markets.¹¹⁴

Japan has played a less significant role as a trading partner, but has been the largest provider of foreign aid in Central Asia, focusing on the modernisation of infrastructure, industrial development, and support of market-friendly governance reforms. Whereas Uzbekistan ranks as a lower-middle-income country, Kazakhstan classifies as an upper-middle-income country and is therefore no longer a recipient of foreign aid. Instead, it is the region's leading destination for Japanese businesses and a gateway for expansion into Uzbekistan.¹¹⁵

Japan pioneered the now-widespread Central Asia Plus dialogue format in 2004, followed by South Korea in 2007.¹¹⁶ Departing from this solid foundation, Japan's bilateral relations with Kazakhstan and Uzbekistan are becoming more varied. In Kazakhstan's case, cooperation with Japan extends to the fields of high-tech, transit, and logistics, as well as cultural and educational exchange. The broadening of

112 Temur Umarov, "How Serious Is the Rapprochement Between the United States and Central Asia?" *Carnegie Politika*, 11 November 2025, <https://carnegieendowment.org/russia-eurasia/politika/2025/11/trump-central-asia-new-deals?lang=en>.

113 "Foreign trade turnover of the Republic of Kazakhstan (January–December 2024)," QAZSTAT [Bureau of National Statistics], 17 February 2025, <https://stat.gov.kz/en/industries/economy/foreign-market/publications/315588>; "Uzbekistan's foreign trade turnover reached US\$65.9 billion in 2024," *UZ Daily*, 20 January 2025, www.uzdaily.uz/en/uzbekistans-foreign-trade-turnover-reached-us659-billion-in-2024/.

114 Dante Schulz, "The Benefits of Deepening the Uzbek–South Korean Strategic Partnership," *Caspian Policy Center*, 20 July 2020, www.caspianpolicy.org/research/articles/the-benefits-of-deepening-the-uzbek-south-korean-strategic-partnership.

115 Timur Dadabaev, "Japan as no 'other': Decolonizing Alternative for Central Asia?" *Central Asia–Caucasus Analyst*, 13 October 2021, www.cacianalyst.org/resources/211013Dadabaev.pdf.

116 Central Asia Plus, or C5+1, is the format in which the five Central Asian states jointly deal with a foreign counterpart. For a full discussion on C5+1, see Section 3.4.

Uzbek–Japanese relations include dialogues on visa liberalisation, labour migration quotas, and educational cooperation.¹¹⁷

Meanwhile, both Kazakhstan and Uzbekistan have attracted growing economic engagement from Gulf states, most notably the United Arab Emirates, Saudi Arabia, and Qatar. Uzbekistan’s level of cooperation with Gulf states has risen particularly sharply. Major companies from Saudi Arabia and the Emirates are investing significantly in Uzbekistan’s renewable energy sector. In 2024, Saudi and Emirati investments in Uzbekistan exceeded Russia’s and could challenge China’s position if the trend continues.¹¹⁸ In Kazakhstan, Gulf states mainly invest in energy and infrastructure, but President Tokayev sees far greater potential for expanding economic ties with them.¹¹⁹

Central Asia has formalised region-to-region contacts with the Gulf Cooperation Council (GCC), consisting of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. The inaugural Central Asia–GCC summit took place in July 2023, thus preceding the Central Asia–EU summit by two years. In their speeches at the summit, both Mirziyoyev and Tokayev enthusiastically endorsed the benefits to reap from growing cooperation with Gulf states and their shared economic development agendas.¹²⁰

India is a sleeping giant in Central Asia. From Almaty and Tashkent, the two largest cities in Central Asia, the closest world capital is New Delhi. The distance from Tashkent to New Delhi is 1,600 kilometres, compared with 2,800 kilometres from Tashkent to Moscow.¹²¹ The distance from Almaty to New Delhi is half that between Almaty and Beijing. Yet, connectivity is lagging. According to figures reported by India’s Ministry of External Affairs, its annual trade volumes with Kazakhstan and Uzbekistan are similar, amounting to slightly less than USD

117 “Yaponiya trudostroit 10 tisyach spetsialistov iz Uzbekistana–Agentstvo migratsii,” *Spot.uz*, 2 June 2025, www.spot.uz/ru/2025/06/02/japan-migration/; Otabek Ibragimov, “The 5th Forum of Rectors of Universities of Uzbekistan and Japan is being held in Samarkand,” *Uzbekistan State World Languages University*, 31 October 2025, www.uzswlu.uz/en/news/the-5th-forum-of-rectors-of-universities-of-uzbekistan-and-japan-is-being-held-in-samarkand-1761889242.

118 For an overview of foreign investors in Uzbekistan, see “2024 Investment Climate Statements: Uzbekistan,” U.S. Department of State, 2024, www.state.gov/reports/2024-investment-climate-statements/uzbekistan/.

119 Saniya Sakenova, “President Tokayev Sets Out Priority Areas for Closer Interaction Between Gulf Countries and Central Asia,” *Astana Times*, 20 July 2023, <https://astanatimes.com/2023/07/president-tokayev-sets-out-priority-areas-for-closer-interaction-between-gulf-countries-and-central-asia/>.

120 Saniya Sakenova, “President Tokayev Sets Out Priority Areas for Closer Interaction Between Gulf Countries and Central Asia,” *Astana Times*, 20 July 2023, <https://astanatimes.com/2023/07/president-tokayev-sets-out-priority-areas-for-closer-interaction-between-gulf-countries-and-central-asia/>; “Uzbekistan President Delivers Speech at First Central Asia–GCC Summit,” *Sada Elbalad English*, 20 July 2023, <https://see.news/uzbekistan-president-delivers-speech-at-first-central-asia-gcc-summit>.

121 S. Frederick Starr, *Greater Central Asia as a Component of U.S. Global Strategy*, Washington, DC: Central Asia–Caucasus Institute, October 2024, p. 9.

1 billion with both.¹²² In recent years, trade between Uzbekistan and India has been growing faster, doubling from 2021 to 2024. In his address at the inaugural India–Central Asia Summit in early 2022, President Mirziyoyev outlined three strategic priorities in India–Central Asia relations: human capital development, trade and economic relations, and cultural and humanitarian cooperation.¹²³

For both India and the Central Asian states, the relationship revolves around connectivity via transport and transit corridors.¹²⁴ What looms on the horizon for Kazakhstan and Uzbekistan is the restoration of historical trade links to the immensely populated Indian subcontinent. By 2040, the total population of India, Pakistan, and Bangladesh is projected to be more than 2.1 billion; India alone will exceed 1.6 billion. This compares with China’s projected 1.3 billion. Instability in Afghanistan, coupled with the deeply fraught Indo–Pakistani relationship, represent the main bottlenecks to the aspiration of restoring Central Asia’s trade links with South Asian markets. India’s strategy towards Central Asia has essentially been a byproduct of its higher-level policy priorities: Afghanistan, China, Pakistan, and its relations with Russia and the US.¹²⁵

Finally, Iran, a neighbour of Central Asia through its border with Turkmenistan, has played a relatively subdued role in Central Asia despite its deep historical links to the region. Trade and investment ties as well as diplomatic engagement have been rising slowly from modest levels. Relations with Iran present Kazakhstan and Uzbekistan with similar opportunities and challenges. The temptation in engaging with Iran is that it offers Kazakhstan and Uzbekistan a gateway to Persian Gulf markets. In 2025, Kazakhstan and Uzbekistan made separate pledges with Iran to develop closer transport links via the International North–South Transport Corridor (INSTC).¹²⁶ However, due to international sanctions on Iran, Kazakhstan and Uzbekistan must tread carefully in navigating relations with Iran. Moreover,

122 “India–Kazakhstan Relations: Bilateral Brief,” Ministry of External Affairs of India, July 2024, www.mea.gov.in/Portal/ForeignRelation/Bilat-Brief-July-2024.pdf; “Brief on India–Uzbekistan Bilateral Relations,” Ministry of External Affairs of India, August 2025, www.mea.gov.in/Portal/ForeignRelation/India-Uzbekistan-Aug-2025.pdf.

123 “Address by the President of the Republic of Uzbekistan Shavkat Mirziyoyev at the First India–Central Asia Summit,” *President.uz*, 27 January 2022, <https://president.uz/en/lists/view/4944>.

124 Aiman Nakispekova, “Kazakhstan, India Strengthen Ties via North–South Transport Corridor,” *Astana Times*, 11 March 2025, <https://astanatimes.com/2025/03/kazakhstan-india-strengthen-ties-via-north-south-transport-corridor/>; “Brief on India–Uzbekistan Bilateral Relations,” Embassy of India, Tashkent, Uzbekistan, August 2025, <https://eoitashkent.gov.in/bilateral-relations-india-uzbekistan/>.

125 Gukshan Sachdeva, “India’s Changing Approach towards Central Asia and the Caucasus after the Afghanistan Debacle,” *Central Asia–Caucasus Analyst*, 14 December 2021, www.cacianalyst.org/resources/211214-FT-Sachdeva.pdf.

126 “Iran, Kazakhstan pledge closer transport ties via INSTC,” *Tehran Times*, 6 August 2025, www.tehrantimes.com/news/516493/Iran-Kazakhstan-pledge-closer-transport-ties-via-INSTC; “Iran and Uzbekistan Pledge to Strengthen Regional Transport and Transit Cooperation,” *The Caspian Post*, 6 January 2025, <https://caspianpost.com/regions/iran-and-uzbekistan-pledge-to-strengthen-regional-transport-and-transit-cooperation>.

despite its stated ambition, Iran does not allocate the level of resources needed to build adequate transportation links with Central Asia.¹²⁷

2.3 A Central Asian model of engagement

Kazakhstan and Uzbekistan acknowledge the erosion of the rules-based international order and the rise of great power rivalries. In this context, they understand multipolarity as an environment within which they exercise agency. Rather than standing as passive observers, they seek to take advantage of the situation by extracting economic, security, and connectivity benefits from various external partners.

Both states implement multipolarity through a multi-vector foreign policy. Kazakhstan, the pioneer in multi-vector diplomacy, balances its ties with Russia and China by concomitantly engaging the EU, the US, Turkey, and others. Under President Mirziyoyev, Uzbekistan has similarly embraced openness, pragmatism, and engagement with a wide range of partners. Practical multi-vector diplomacy entails reciprocal relationships, hedging against risks of overdependence, and the active pursuit of diversified ties in economic and security affairs.

Their external trade relations are depicted in Figure 1.

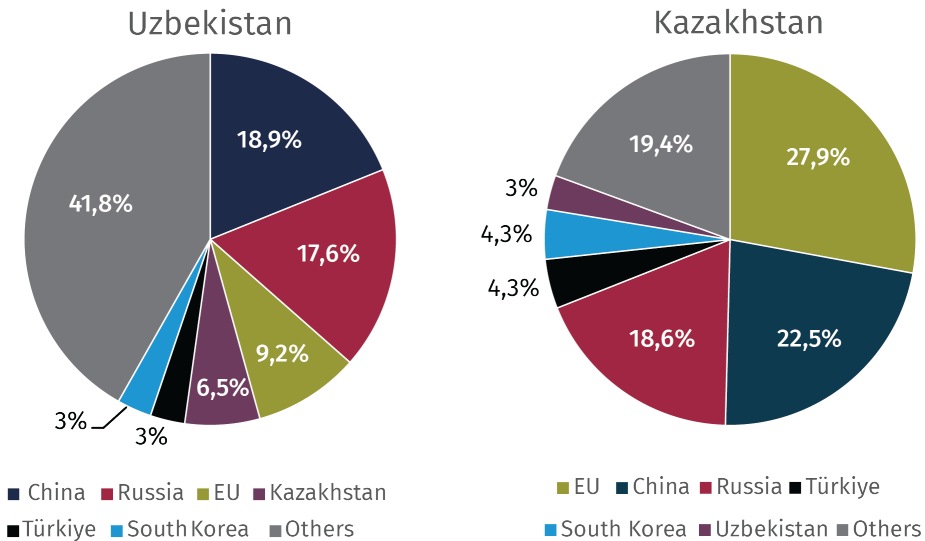


Figure 1 External trade 2023

Source: Author compilation based on official statistics from Kazakhstan and Uzbekistan.

127 Brenda Shaffer, "Iran's policy toward the Caucasus and Central Asia," *Central Asia-Caucasus Analyst*, 17 August 2022, www.cacianalyst.org/resources/220817-FT-Iran.pdf.

Across all major and emerging partners, Kazakhstan and Uzbekistan have established specific forms of engagement driven by strategic considerations. The essence of these partnerships is summarised in Table 1.

Table 1 Typology of external partners.

Partner	Nature of Engagement	Strategic Considerations
Russia	Historical, security, economic, military alignment; Integration of institutional cooperation CSTO/EEU (Kazakhstan); infrastructural and trade reliance	Cannot be decoupled; requires careful balancing (support sovereignty, avoid anti-Russia stance).
China	Economic powerhouse, BRI partner, investor in infrastructure, energy, technology and surveillance; growing security cooperation	Focus on economic diversification; ensure sovereignty and strategic leverage.
Turkey	Security and military modernisation, shared Turkic identity, trade/ investment and connectivity	Complementary to Russia/China dependence; enhances military autonomy and regional connectivity.
EU	Largest investor and trade partner (Kazakhstan), technological expertise, shared interest in trade diversity	Economic diversification, knowledge transfer, green transition, avoid dependency on Russia/China.
United States	Security, investment, critical minerals, aircraft and rail equipment	Strategic hedging; cautiousness due to normative expectations giving way to pragmatic economic deals.
Japan & South Korea	High-tech, industrial investments, aid, technology transfer	Long-term economic partnerships; modernisation and industrial upgrading.
Gulf States (UAE, Saudi Arabia, Qatar)	Investment in energy, renewables, infrastructure	Emerging diversification; UAE/ Saudi investments surpass Russia in Uzbekistan; strengthens financial resilience.
India	Trade, transport, regional connectivity	Potential growth market; historical links; constrained by Afghanistan-Pakistan security context.
Iran	Transport corridor potential (INSTC), gateway to Gulf markets	Opportunities for connectivity and trade; constrained by sanctions and limited capacity.

This overview indicates that three broad factors are driving the foreign policy calculations of Kazakhstan and Uzbekistan:

1. *Economic interests*: Both countries eagerly pursue a wide variety of economic deals that can help them maximise trade and investment while avoiding unhealthy reliance on a single partner. Additionally, to pursue economic modernisation, they seek technology transfer and value-added production rather than just being sites to exploit for resource extraction.

2. *Security*: For younger states such as Kazakhstan and Uzbekistan, maintaining sovereignty and national independence are ongoing objectives. They, therefore attempt to hedge against external threats by diversifying security partnerships and upgrading their military capabilities.
3. *Connectivity*: Kazakhstan and Uzbekistan actively pursue the expansion of east–west and north–south transport corridors. By developing their transit hub potential, they seek integration into global and regional trade networks.

In sum, the multi-vector diplomacy of Kazakhstan and Uzbekistan is proactive, reciprocal, and devoid of value-laden perspectives. While the strategy maximises flexibility, it requires hyper-activity and constant balancing, and exposes them to simultaneous pressure from multiple actors. Ultimately, their own agency has limits. Multi-vector diplomacy works only if other states are willing to engage, a condition that cannot be taken for granted.

3. Regional order-making: Inward consolidation, outward expansion

THIS CHAPTER EXAMINES THE policies that Kazakhstan and Uzbekistan are pursuing to enhance the collective power of Central Asia in a multipolar world. Until recent years, this objective seemed a distant prospect. For much of the first quarter-century of independence, the Central Asian states primarily turned inward, focusing on safeguarding their sovereignties and identities, often defining themselves in opposition to one another. This was a typical post-colonial journey, marked by efforts to consolidate statehood.

Nevertheless, Central Asian leaders were not ignorant of the potential of regional cooperation. Discussions on Central Asian integration were already underway in the 1990s. In 1994, Kazakhstan and Uzbekistan signed a treaty creating a common economic space between the two countries, which Kyrgyzstan and Tajikistan later joined, leading to the formation of the Central Asia Economic Forum in 1998. Four years later, in 2002, the Central Asian Cooperation Organization (CACO) was officially created with the same four states participating. CACO's declared ambition was to promote economic cooperation and coordinate foreign policy.¹²⁸

However, by 2005, CACO had effectively ceased to exist after Russia joined the organisation and absorbed it into the Moscow-led Euro-Asian Economic Community (EurAsEC), the predecessor to the current Eurasian Economic Union (EAEU).¹²⁹ The Central Asian leaders announced the decision at a meeting in Saint Petersburg the day before Russian President Putin's birthday, who remarked that it was "the best birthday present from colleagues."¹³⁰ After the dissolution of CACO, the region fell into a more-than-decade-long impasse in regional cooperation efforts. During this period, a litany of unresolved regional issues—border disputes, conflicts over water and energy, trade barriers, inter-ethnic tensions, and different views on the role of Russia in the region—contributed to a negative trajectory in Central Asia.

128 Johan Engvall, "The Reemerging Self-Confidence of Central Asia," *Central Asia–Caucasus Analyst*, 22 March 2018, www.cacianalyst.org/publications/analytical-articles/item/13504-the-reemerging-self-confidence-of-central-asia.html.

129 Sanat Kushkumbayev, *Gone but Not Forgotten: The Central Asian Union, 1990–2005*, Washington, DC: Central Asia–Caucasus Institute, June 2025, www.silkroadstudies.org/resources/250612-Kushkumbayev-final.pdf.

130 "Central Asia Report: October 15, 2025," *RFE/RL*, 15 October 2005, www.rferl.org/a/1342135.html.

The tide turned with the 2016 power transition in Uzbekistan. Since coming to power, President Mirziyoyev has promoted a Central Asia First policy, which has been decisive in elevating regional cooperation to a level that would have been impossible to imagine less than a decade ago. The growing unity in Central Asia has not emerged spontaneously; it stems from the political will of regional leaders. In 2018, the UN General Assembly unanimously adopted a resolution initiated by Uzbekistan and supported by all regional states on Strengthening Regional and International Cooperation to Ensure Peace, Stability, and Sustainable Development in the Central Asian Region. As a result of the resolution, Central Asia gained global recognition as a coherent region willing to take collective responsibility for its development.¹³¹ Thereafter, Central Asian cooperation has taken creative forms, from legally binding bilateral agreements to trilateral, project-based cooperation across a wide range of sectors, to region-wide cooperation formats.¹³²

The revived spirit of cooperation has already produced tangible results. Intra-regional trade almost doubled between 2019 and 2024, reaching close to USD 11 billion. Special border trade zones have been established across the region to provide further impetus for trade among the Central Asian countries. Long-standing issues of contention, such as unresolved border disputes and disagreements over the use of the region's scarce water resources, are being addressed with a collective mindset taking into account the interests of all concerned parties. This marks a sharp break with the zero-sum attitudes prevalent in the past.

3.1 The Kazakh-Uzbek axis of cooperation

Kazakh-Uzbek relations have not always been amicable. During the long reigns of Kazakhstan's and Uzbekistan's first presidents, Nursultan Nazarbayev (1991–2019) and Islam Karimov (1991–2016), relations between the two countries and their heads of state were often characterised by a latent, if not open, rivalry over regional leadership.¹³³ This had a detrimental effect on intra-regional cooperation.

Although a certain Kazakh-Uzbek rapprochement could be observed in the early 2010s, leading to the formation of a strategic partnership in 2013, the main

131 Batir Tursunov, "UNGA Adopts Resolution on Strengthening Cooperation in Central Asia," *Central Asia-Caucasus Analyst*, 5 September 2018, www.cacianalyst.org/publications/analytical-articles/item/13532-unga-adopts-resolution-on-strengthening-cooperation-in-central-asia.html.

132 Svante E. Cornell, "Layers of Cooperation: The Gradual Institutionalization of Central Asian Cooperation," *Central Asia-Caucasus Analyst*, 1 August 2025, www.cacianalyst.org/resources/Cornell_Central_Asia.pdf.

133 In his reflections as Kazakhstan's top diplomat, current President Tokayev noted in 2004 that a certain historically rooted rivalry over the leadership position in the region had an impact on the relations between Kazakhstan and Uzbekistan in the first decade of independence. See Kassym-Jomart Tokayev, *Meeting the Challenge: Memoirs by Kazakhstan's Foreign Minister*, New York: Global Scholarly Publications, 2004, p. 178.

turning point came when Mirziyoyev took the reins in Uzbekistan following Karimov's death in 2016. Since then, Mirziyoyev has placed Central Asia at the core of Uzbekistan's foreign policy, guided by the principle of "zero problems with neighbours."¹³⁴ Whereas Karimov saw national security as confined to the borders of Uzbekistan, Mirziyoyev's conception of national security goes beyond national borders and therefore requires a regional approach. He has addressed long-standing sources of intra-regional tensions, such as mutual territorial claims and water-related disputes, and developed strong bilateral relations with all neighbours. The regional approach to building stability and security in a "common home—Central Asia" has been reinforced by increasing geopolitical instability arising from the war in Ukraine and the situation in Afghanistan.¹³⁵ Thus, Mirziyoyev's understanding of Uzbekistan's security is intrinsically tied to the security and stability of neighbouring countries.

To elevate the collective weight of Central Asia, Uzbekistan's overture has been reciprocated by Kazakhstan, the state that has traditionally led cooperative initiatives in the region. Astana has long been a proponent of economic cooperation and foreign policy coordination among the Central Asian states. Kazakhstan's argument, first made in the 1990s, was that a Central Asian economic bloc would allow the countries to truly integrate into the world economy as more than suppliers of raw materials.¹³⁶

Following the invasion of Ukraine, the Kazakh–Uzbek axis of cooperation has intensified. At a meeting in Tashkent in late 2022, the two sides signed a host of agreements on economic cooperation in various spheres as well as on border demarcation. They also signed a treaty on allied relations, the first of its kind in Central Asia.¹³⁷ Although the "alliance" does not include a defence treaty, it sets out measures to enhance cooperation in defence, security, and foreign policy. The treaty instituted a Supreme Interstate Council chaired by the heads of state of the two countries, which convened for the first time in 2024 in Astana.¹³⁸

134 Javlon Vakhobov, "A New Central Asia Emerging: Opportunities and Challenges," *Central Asia–Caucasus Analyst*, 25 July 2025, www.cacianalyst.org/resources/230725_FT_Vakhobov_edditted.pdf.

135 Firdavs Kobilov, "From geopolitical pendulum to regional player: Uzbekistan's regional foreign policy following the leadership change in 2016," *Central Asian Survey*, published online 10 April 2025.

136 Serik Primbetov, "Central Asia: Prospects for Regional Integration," in *Economic Transition in Russia and the New States of Eurasia*, edited by Bartłomiej Kaminski, Armonk: M.E. Sharpe, 1996, p. 167.

137 Dana Omirgazy, "Kazakhstan, Uzbekistan Sign Treaty on Allied Relations, Agreement on Border Demarcation to Foster Strategic Partnership," *Astana Times*, 23 December 2022, <https://astanatimes.com/2022/12/kazakhstan-uzbekistan-sign-treaty-on-allied-relations-agreement-on-border-demarcation-to-foster-strategic-partnership/>.

138 Svante E. Cornell, "Layers of Cooperation: The Gradual Institutionalization of Central Asian Cooperation," *Central Asia–Caucasus Analyst*, 1 August 2025, www.cacianalyst.org/resources/Cornell_Central_Asia.pdf.

The Kazakh–Uzbek axis underpins all regional collaboration efforts. Each leader has articulated their vision for Central Asia. In connection with the 2024 Central Asia summit in Astana, Tokayev published the article *The Renaissance of Central Asia: On the Path to Sustainable Development and Prosperity*.¹³⁹ In turn, Mirziyoyev formulated his vision in an article titled *Central Asia on the Verge of a New Era* ahead of the 2025 Central Asia summit in Tashkent.¹⁴⁰

Both articles underline Central Asia's shared historical and civilisational identity as the foundation for unity. Both also emphasise that cooperation must be voluntary, pragmatic, and pursued with due respect for national sovereignty. Economic integration and trade are core objectives for both leaders. However, Uzbekistan's president emphasises intra-regional trade and economic partnerships, while Tokayev focuses on building trade and logistics hubs to enhance the region's connections with the outside world. Thus, the main difference is that the Kazakh leader frames his vision more in terms of foreign relations and Central Asia's role in a global context, while the Uzbek leader anchors it more to intra-regional and domestic policy processes. This is unsurprising: Kazakhstan is the more outward-oriented and independent state in the region, whereas Uzbekistan, bordering all the other states in Central Asia, focuses on regional integration in trade, industry, energy, and water.

There are some potential differences between Astana's and Tashkent's foreign policy outlooks that could create challenges in the future. Perhaps the major differentiator between Kazakhstan and Uzbekistan concerns their relationship to the broader Eurasian integration project led by Russia. Kazakhstan is a member of the CSTO and the EAEU while Uzbekistan rejects membership in these organisations.¹⁴¹ During the reigns of Nazarbayev and Karimov, divergent positions on the role of Russia in the region's economy and security were a source of contention. While Nazarbayev actively promoted economic integration with Russia, Karimov took a much more cautious stance toward Russian-led blocs in economic and security policy.¹⁴² Efforts to pursue free trade are complicated by conflicting arrangements with the World Trade Organization (WTO) and the EAEU, even though Uzbekistan is in advanced negotiations to finally join the WTO. Although Tokayev

139 Kassym-Jomart Tokayev, "The Renaissance of Central Asia: On the Path to Sustainable Development and Prosperity," *Astana Times*, 8 August 2024, <https://astanatimes.com/2024/08/the-renaissance-of-central-asia-towardssustainable-development-and-prosperity/>.

140 Shavkat Mirziyoyev, "Central Asia on the verge of a new era," *President.uz*, 13 November 2025, <https://president.uz/en/lists/view/8653>.

141 Overall, Central Asian countries display considerable variation in relation to Eurasian cooperation organisations. Kazakhstan and Kyrgyzstan are members of both the CSTO and the EAEU, while Tajikistan is only a member of the CSTO. Turkmenistan and Uzbekistan remain outside both organisations.

142 Sanat Kushkumbayev, *Gone but Not Forgotten: The Central Asian Union, 1990–2005*, Washington, DC: Central Asia–Caucasus Institute, June 2025, www.silkroadstudies.org/resources/250612-Kushkumbayev-final.pdf.

and Mirziyoyev have kept their differences in check, they nevertheless complicate the foreign policy landscape.

The approach to Afghanistan is also slightly different. While both states support engaging with Afghanistan on issues including transport and logistics as well as humanitarian cooperation, Uzbekistan advances a more proactive position. The Uzbek political leadership emphasises that Afghanistan, which it directly borders, is an integral part of the region and is willing to engage with the Taliban in a manner that Kazakhstan is less prepared to do.¹⁴³ Overall, however, the unprecedented friendship between Kazakhstan and Uzbekistan has benefitted from strong personal ties between the two presidents. Interpersonal relations and dynamics are especially pronounced in the personalistic political culture of Central Asia. While the importance of personal relationships can pose risks during leadership changes, it also means that strong personal ties can enable rapid and far-reaching progress. The Kazakh–Uzbek rapprochement under Tokayev and Mirziyoyev serves as a testament to the latter.

3.2 Consultative Meetings of the Heads of State

The main platform for dialogue, coordination, and political steering of regionalism is the Consultative Meetings of the Heads of State, also known as C5 summits. The format was proposed by Uzbek President Mirziyoyev in 2017 and garnered the support of all regional leaders. Since the inaugural meeting in 2018, it has been held every year, except during the height of the COVID-19 pandemic in 2020, with the seventh meeting taking place in Tashkent in November 2025. The consultative meeting format serves as a flexible leadership forum that allows Central Asian presidents to directly discuss shared challenges and identify common priorities. While not a formalised regional integration structure, it has developed into a kind of informal institution: a durable practice that serves specific functions of order-making.¹⁴⁴

The consultative meetings have evolved into an umbrella for cooperation initiatives across the region. In 2022, the annual summit held in Kyrgyzstan resulted in an agreement titled the Treaty on Friendship, Good-Neighbourliness, and

143 Viktoriya Panfilova, “Afghanistan stanovitsya dlya Kazakhstana odnim iz vazhneishikh partnerov,” *Nezavisimaya gazeta*, 13 August 2025, www.ng.ru/cis/2025-07-13/5_9292_kazakhstan.html.

144 Filippo Costa Buranelli, “The Consultative Meetings of Heads of State of Central Asia: local norms, institutions and the fundamentals of regional order,” *International Affairs*, 102, no. 1 (2026), pp. 121–145.

Cooperation for the Development of Central Asia in the 21st Century.¹⁴⁵ All states but Turkmenistan have since ratified the treaty, in which the regional states commit to coordinate their policies in areas as diverse as trade, economics, social policy, culture, ecology, medical research, and security.¹⁴⁶ In the subsequent 2023 summit in Dushanbe, Tajikistan, Central Asian leaders decided to establish a Council of National Coordinators, tasked with strengthening the effectiveness and coherence of regional cooperation.¹⁴⁷ In Astana 2024, regional leaders adopted the Concept for the Development of Regional Cooperation: Central Asia—2040, a strategic vision for deepening regional integration through a phased approach.¹⁴⁸

Finally, the 7th consultative meeting held on 15–16 November 2025 in Tashkent resulted in the decision to welcome Azerbaijan as a full participant, turning C5 into C6. The inclusion of Azerbaijan in a greater Central Asian region spanning the Caspian is effectively redefining regional cooperation.¹⁴⁹ It serves as an official confirmation of a reality that has emerged in recent years, namely that Central Asia and the South Caucasus are converging into a common strategic space.¹⁵⁰

Azerbaijan is the key link between the Caucasus and Central Asia.¹⁵¹ By leveraging its indispensable position in all transport networks on the western shore of the Caspian Sea, Azerbaijan's importance to Central Asia has significantly increased in the wake of sanctions. Baku has bilaterally signed a Declaration of Strengthening Strategic Relations with Kazakhstan and a Treaty on Alliance with Uzbekistan.¹⁵²

145 “Dogovor mezhdu Respublikoi Kazakhstan, Kyrgyzskoi Respublikoi, Respublikoi Tadjikistan, Turkmenistanom i Respublikoi Uzbekistan o družbe, dobrososedstve i sotrudnichestve v tselnykh razvitiya Tsentralnoi Azii v XXI veke,” *Adilet*, 20 July 2022, <https://adilet.zan.kz/rus/docs/P2200000507>.

146 “Tajikistan Officially Joins Central Asia Cooperation Treaty in Dushanbe,” *CentralasianLIGHT.org*, 29 August 2025, <https://centralasianlight.org/news/tajikistan-officially-joins-central-asia-cooperation-treaty-in-dushanbe/>.

147 “Itogi Dushanbinskogo sammita: dokumenty i dogovorenosti,” *ORIENT*, 14 September 2023, <https://orient.tm/ru/post/60184/itogi-dushanbinskogo-sammita-dokumenty-i-dogovorenosti>.

148 “Results of meeting of Central Asian leaders in Astana: Several significant documents signed,” *CentralasianLIGHT.org*, 9 August 2024, <https://centralasianlight.org/news/results-of-meeting-of-central-asian-leaders-in-astana-several-significant-documents-signed/>; author's conversation with an Uzbek diplomat, Tashkent, April 2025.

149 On Greater Central Asia, see S. Frederick Starr, *Greater Central Asia as a Component of U.S. Global Strategy*, Washington, DC: Central Asia–Caucasus Institute, October 2024.

150 Johan Engvall, “The Convergence of the South Caucasus and Central Asia: An Opportunity for a New EU Partnership,” *Central Asia–Caucasus Analyst*, 22 January 2025, https://cacianalyst.org/resources/240122_FT_Engvall.pdf.

151 Azerbaijan has gained a high level of respect among fellow Turkic states in Central Asia due to its restoration of territorial integrity and its ability to handle Russia in the context of the Armenia–Azerbaijan conflict.

152 “Press statements by the Presidents of Azerbaijan and Kazakhstan,” *President.az*, 10 April 2023, <https://president.az/en/articles/view/59405>; “Uzbekistan and Azerbaijan finalize allied partnership with treaty ratification,” *Kun.uz*, 20 May 2025, <https://kun.uz/en/75175518>. The alliance elevated Uzbekistan's relations with Azerbaijan to the same level as its bilateral relationship with Kazakhstan.

Azerbaijan's President Ilham Aliyev was an honorary guest at the C5 summits in 2023 and 2024, but now participates as a permanent member of the new C6 format. According to Azerbaijan's leader:

Azerbaijan and the countries of Central Asia represent an integrated historical, cultural, geographical and geopolitical space of growing significance. The Caspian Sea, which may, at first, glance, appear to physically separate Azerbaijan from the countries of Central Asia is actually a substantial factor in bringing these countries together. Today, the Caspian Sea is not a mere geographical notion as it is, above all, a symbol of the strategic unity, economic potential and historical cooperation of our peoples.¹⁵³

It remains to be seen whether this pivotal decision means that Azerbaijan will be integrated into the region's interaction with external partners, thereby expanding the flourishing C5+1 format, discussed below, to a new C6+1 format. If that is the ambition, the real test of local efforts to redefine the region will be whether the regional states can persuade their external partners to engage with a region that now comprises six countries.

Within the framework of the consultative meetings of heads of state, regional security cooperation is gradually expanding. Regular gatherings take place between the heads of national security councils to address common threats.¹⁵⁴ Moreover, at the 2025 Tashkent summit, the states approved a regional security concept and a catalogue of security risks, along with measures to prevent and mitigate those risks.¹⁵⁵

In sum, the consultative meetings have evolved from a confidence-building mechanism designed to restore trust among the Central Asian states into a forward-looking platform seeking to advance regional interests externally. The fact that these consolidation efforts are generated without external involvement lays a foundation for building prosperity, stability, and security from within the region rather than relying on external actors.

153 "Azerbaijan attaches special importance to comprehensive development of cooperation with all Central Asian countries—President Ilham Aliyev," *Trend.az*, 13 November 2025, www.trend.az/azerbaijan/politics/4117045.html.

154 "Central Asian Security Chiefs Convene in Samarkand to Discuss Counterterrorism and regional Stability," *The Caspian Post*, 19 April 2025, <https://caspianpost.com/central-asia/central-asian-security-chiefs-convene-in-samarkand-to-discuss-counterterrorism-and-regional-stability>.

155 "Na Sedmoi Konsultativnoi vstreche glav gosudarstv TsA podpisan i prinyat ryad dokumentov," *Akchabar*, 16 November 2025, www.akchabar.kg/news/na-sedmoj-konsultativnoj-vstrechi-glav-gosudarstv-tsa-podpisan-i-prinyat-ryad-dokumentov-pivalysqwbzbvctr. The catalogue of security risks was proposed by President Tokayev in his op-ed ahead of the 2024 summit in Astana. See Kassym-Jomart Tokayev, "The Renaissance of Central Asia: On the Path to Sustainable Development and Prosperity," *The Astana Times*, 8 August 2024, <https://astanatimes.com/2024/08/the-renaissance-of-central-asia-towards-sustainable-development-and-prosperity/>.

3.3 Trilateral sectoral cooperation

Beneath the umbrella of region-wide cooperation, Kazakhstan and Uzbekistan are spearheading specific trilateral constellations to address transboundary economic, security, and societal vulnerabilities. These sectoral coordination projects have proliferated, involving regional states as well as neighbouring countries. The following sections outline some of the most significant of these initiatives.

3.3.1 Borders, water and energy

A long-standing security problem in Central Asia relates to territorial disputes between the countries. During the Soviet Union period, internal borders between the Central Asian republics represented administrative arrangements. After independence, the situation changed as these administrative divisions became international borders. Nowhere was the problem as pressing as in the densely populated Ferghana Valley, the area in which the territories of Kyrgyzstan, Tajikistan, and Uzbekistan meet.

In the late 1990s, Uzbekistan militarised its borders with Kyrgyzstan and Tajikistan, leading to numerous fatalities due to either shootings by border guards or land mines.¹⁵⁶ President Mirziyoyev made resolving Uzbekistan's border disputes with Kyrgyzstan and Tajikistan a priority. In January 2020, Uzbekistan and Tajikistan declared the joint border to be fully demined and finalised the border demarcation. The Uzbek–Kyrgyz border solution required land swaps, which were agreed upon in 2018 and fully implemented in 2024.¹⁵⁷

The Kyrgyz–Tajik border proved to be a harder task. Skirmishes between civilians and border guards had become increasingly frequent in the 2010s, only to escalate in 2021 and 2022 into heavy shelling between the two countries' armed forces. The fighting in 2022 took more than 100 lives.¹⁵⁸ Despite concerns of further escalation, the large-scale violence actually turned out to be a turning point.

Kyrgyzstan and Tajikistan, with Uzbekistan's active informal participation, engaged in a serious dialogue to finally reach a joint border agreement. The process was concluded on 31 March 2025, when the presidents of the three states

156 UNDP, *Bringing down barriers: Regional cooperation for human development and human security*, New York: Central Asia Human Development Report, 2005.

157 "Kyrgyzstan Completes Resettlement of Residents From Exclave in Uzbekistan," *The Times of Central Asia*, 22 April 2024, <https://timesca.com/kyrgyzstan-completes-resettlement-of-residents-from-exclave-in-uzbekistan/>.

158 Asel Doolotkeldieva and Erica Marat, "Why Russia and China Aren't Intervening in Central Asia," *Foreign Policy*, 4 October 2022, <https://foreignpolicy.com/2022/10/04/tajikistan-kyrgyzstan-russia-china-intervention-central-asia/>

signed the Khujand Declaration, which formally finalised their shared border junction.¹⁵⁹ This historic event means that all borders between the Central Asian states have now been demarcated and serves as a symbol of a new era of cooperation. The process was completed without external involvement, despite Moscow's offer to assist by providing old Soviet territorial maps.¹⁶⁰ However, political agreements do not automatically translate into trust on the ground, particularly in the Kyrgyz–Tajik case, where border communities have fresh memories of recent conflict. Nevertheless, the border delimitation process in the Ferghana Valley demonstrates that regional cooperation can foster a willingness to compromise even on the most sensitive of issues.

The management of Central Asia's transboundary water resources have been the other outstanding source of tension in Central Asia, dating back to the early days of independence. The issue of shared water resources has not yielded solutions as definitive as those achieved on border delimitation. Water scarcity in Central Asia is exacerbated by over-exploitation of available water resources and the effects of climate change. The water in the region is unevenly distributed and also used for different purposes. For upstream countries, Kyrgyzstan and Tajikistan, water is predominantly used for hydropower production in the winter. The downstream countries, Kazakhstan, Turkmenistan, and Uzbekistan, mainly use water for irrigating crops in the summer. Resolving the water problem requires a joint energy strategy as well as agricultural modernisation, especially in Uzbekistan.

In a spirit of collaboration, the states are attempting to address water resource management in a manner that considers the needs of both upstream and downstream countries. In September 2025, Kazakhstan, Kyrgyzstan, and Uzbekistan signed an agreement on coordinated water and energy management. The agreement amounts to a water–energy swap deal and defines mutual obligations for water release and electricity exchanges. In practice, this means that Kyrgyzstan will release water from the Toktogul Hydroelectric Power Plant's reservoir to downstream Kazakhstan and Uzbekistan in exchange for electricity from both countries.¹⁶¹ Within this trilateral framework of cooperation, the states have also agreed to jointly develop the Kambarata hydropower plant in Kyrgyzstan.¹⁶²

159 The agreement is referred to as the Treaty on the Junction Point of the State Borders of Kyrgyzstan, Tajikistan, and Uzbekistan. See “Prezident Uzbekistana prinyal uchastie v trekhstoronnei vstroche glav gosudarstv,” *President.uz*, 31 March 2025, <https://president.uz/ru/lists/view/8001>.

160 “Putin Agrees To Present Archive Maps To Help Solve Border Disputes Between Kyrgyzstan, Tajikistan,” *RFE/RL Kyrgyz Service*, 17 October 2022, www.rferl.org/a/kyrgyzstan-tajikistan-borders-maps-russia/32088373.html.

161 Sergey Kwan, “Kazakhstan, Kyrgyzstan, and Uzbekistan Agree on Joint Water and Energy Measures,” *The Times of Central Asia*, 9 September 2025, <https://timesca.com/kazakhstan-kyrgyzstan-and-uzbekistan-agree-on-joint-water-and-energy-measures/>.

162 “Kazakhstan, Kyrgyzstan i Uzbekistan gotovyatsya stroit Kambaratinskuyo GES-1,” *Sputnik Kazakhstan*, 15 April 2024, <https://ru.sputnik.kz/20240415/kazakhstan-kyrgyzstan-i-uzbekistan-gotovyatsya-stroit-kambaratinskuyu-ges-1-43681013.html>.

Besides this trilateral format, Uzbekistan has reached an agreement with Tajikistan to buy electricity from the gigantic Rogun Hydropower Plant, which has been under construction since 2017 and is projected to be completed by 2033.¹⁶³

Another water-related challenge arises from Afghanistan, where the Taliban is constructing the Qosh Tapa Canal. The canal, which is being dug in northern Afghanistan, is planned to be approximately 285 kilometre long and would divert water from the Amu Darya River, which flows downstream into Uzbekistan and Turkmenistan. It has been estimated that this project could reduce the water supply to Uzbekistan by 15 per cent and Turkmenistan's by much more. Uzbekistan has proactively engaged the Taliban in a dialogue on the issue and offered technical assistance.¹⁶⁴

3.3.2 Transport corridors and connectivity

Kazakhstan and Uzbekistan harbour visions of a future Central Asia at the forefront of world affairs, as expressed in Astana's conception of acting as a bridge between east and west and Tashkent's idea of the country as being at the crossroads of civilisations. This requires connectivity. But the two countries are constrained by being landlocked and geographically isolated, which affects trade, production, and financial relationships. The shared strategic priority is for Central Asia to re-emerge as a hub for land-based continental trade.¹⁶⁵ They pursue this objective through a flurry of overlapping, and at times potentially competing, initiatives.

East-West connectivity

The main embodiment of regionally driven economic connectivity is the Trans-Caspian International Transport Route, known as the Middle Corridor. This land and sea transport corridor, which connects Southeast Asia and China to Europe, passing through Central Asia and the South Caucasus, provides an alternative

163 "Tadzhikistan budet eksportirovat Uzbekistanu elektro-energiyu Rogunskoi GES," *Gazeta.uz*, 17 July 2025, www.gazeta.uz/ru/2025/07/17/ges/.

164 Eric Rudenshiold, "Afghanistan's Rocky Road to Re-Emergence: Central Asia's Kabul-Stoned Path South," *Caspian Policy Center Special Report*, 2024, https://api.caspianpolicy.org/media/ckeditor_media/2024/08/20/central-asias-kabul-stoned-path-south_kKb6496.pdf.

165 See "Kassym-Jomart Tokayev: 'Role of Middle Corridor has rapidly increased today,'" *APA*, 10 March 2024, <https://en.apa.az/foreign-policy/kassym-jomart-tokayev-role-of-middle-corridor-has-rapidly-increased-today-430655>; Abduaziz Khidirov, "Uzbekistan Enhances Its Role in the Global Economy," *UzA*, 30 April 2025, https://uza.uz/en/posts/uzbekistan-enhances-its-role-in-the-global-economy_714964.

transport route to the disrupted Northern Corridor that connects Europe and Asia through Russia.¹⁶⁶

Since 2022, the Middle Corridor has gained unprecedented significance. Cargo transit volumes along the corridor increased from 1.5 million tonnes in 2022 to 2.7 million tonnes in 2023 and 4.5 million tonnes in 2024.¹⁶⁷ The total capacity is currently estimated at 5.8 million tonnes annually. However, the World Bank estimates that the capacity of the corridor could reach 11 million tonnes by 2030, and travel times between China and Europe could be halved. Achieving this would require investments and improved policies, including standardised logistics solutions, simplified procedures at border crossings, coordinated digitalisation, and improved availability of vessels and efficiency at Caspian Sea ports.¹⁶⁸

Ultimately, success will depend on the route's cost-effectiveness compared to alternative corridors. In this context, a Trans-Caspian dynamic has emerged, tying Central Asia and the South Caucasus together. Regional states on both the western and eastern shores of the Caspian Sea have launched several initiatives in various configurations. Kazakhstan, Azerbaijan, and Georgia have set up a joint logistics company to simplify all procedures for carrying cargo along the route. Azerbaijan, Georgia, Kazakhstan, and Turkey have agreed on a roadmap for the development of the corridor.¹⁶⁹

Thus, along with intra-regional consolidation, the search for ways to diversify trade and transport logistics has spurred an outward expansion in the form of an evolving greater Central Asian region. Turkic cooperation serves as a framework for reinvigorating trade and transport. All members of the OTS have jointly promoted the so-called Zangezur Corridor, a transport corridor between western parts of Azerbaijan through Armenia to Azerbaijan's Nakhichevan exclave and onwards

166 Russia's war against Ukraine had a negative effect on Central Asia's trade potential since the partial closure of transit routes passing through Russia. Disrupted trade routes led to an increase in the prices of some imported goods and agricultural products. While most east-west trade between Asia and Europe is by sea and air, the predominantly land-based routes across Central Asia provide an alternative that is cheaper than air travel and faster than sea routes. The Middle Corridor's 7,000 kilometres compare to the Northern Corridor's 10,000 kilometres, and the Ocean Route's 20,000 kilometres.

167 Saniya Sakenova, "Cargo Transportation Along Middle Corridor Increase to 1.5 Million Tons in 2022," *The Astana Times*, 23 May 2023, <https://astanatimes.com/2023/05/cargo-transportation-along-middle-corridor-increases-to-1-5-million-tons-in-2022/>; "Middle Corridor freight volumes grow by more than 60%," *RailFreight.com*, 30 August 2024, www.railfreight.com/beltandroad/2024/08/30/middle-corridor-freight-volumes-grow-by-more-than-60/?gdpr=accept; "Traffic via Trans-Caspian International Transport Route up 62% to 4.5 mln tonnes in 2024," *Interfax*, 14 March 2025, <https://interfax.com/newsroom/top-stories/110366/>.

168 World Bank, *Middle Trade and Transport Corridor: Policies and Investments to Triple Freight Volumes and Halve Travel Time by 2030*, Washington, DC: The World Bank, 2023, <https://openknowledge.worldbank.org/server/api/core/bitstreams/7e6a216e-eb56-4783-ba1b-b7621abdcd9/content>.

169 Assel Satubaldina, "Cargo Transportation Along Middle Corridor Soars 88%, Reaches 2 Million Tons in 2023," *Astana Times*, 28 December 2023, <https://astanatimes.com/2023/12/cargo-transportation-along-middle-corridor-soars-88-reaches-2-million-tons-in-2023/>.

to Turkey. As a key provision of the US-brokered peace agreement signed between Armenia and Azerbaijan in August 2025, this corridor will be implemented under the framework of the Trump Route for International Peace and Prosperity (TRIPP). When operational, TRIPP will open up an additional trade route in the South Caucasus, complementing the existing Baku–Tbilisi–Kars railway route, which connects Azerbaijan through Georgia to Turkey, and onwards to Europe. Sensing this opportunity, the leaders of Kazakhstan and Uzbekistan quickly lauded the peace deal between Armenia and Azerbaijan as a historic achievement.¹⁷⁰

Driven by connectivity and joint economic interests in developing a sustainable Middle Corridor, a strong trilateral strategic framework of cooperation has developed between Kazakhstan, Uzbekistan, and Azerbaijan. As Svante Cornell notes, these three aspiring middle powers are jointly developing into an increasingly independent regional power constellation in the heart of Eurasia.¹⁷¹

As part of the Middle Corridor, Kazakhstan, Uzbekistan, and Azerbaijan have proposed the construction of a Green Energy Corridor to transmit renewable electricity generated in Uzbekistan across the Caspian and Black Seas to Europe.¹⁷² The three states jointly aim to build infrastructure to export green electricity to other regions. This ambitious project, which includes deep-water cables and transnational energy infrastructure, will require technical, financial, and political support. To this end, they want a strong partnership with the EU.¹⁷³ While much work remains to be done, the initiative demonstrates the growing ambitions of this trilateral grouping in east–west connectivity.

Besides its strategic cooperation with Azerbaijan and Kazakhstan, Uzbekistan has taken the lead in increasing reclusive Turkmenistan’s involvement in regional

170 “Tokayev considers initialing of peace agreement between Azerbaijan and Armenia a historic achievement,” *APA*, 9 August 2025, <https://en.apa.az/asia/tokayev-considers-initialing-of-peace-agreement-between-azerbaijan-and-armenia-a-historic-achievement-474691>; “Shavkat Mirziyoyev congratulates President of Azerbaijan on signing of peace declaration with Armenia,” *Tashkent Times*, 10 August 2025, <https://tashkenttimes.uz/national/15792-shavkat-mirziyoyev-congratulates-president-of-azerbaijan-on-signing-of-peace-declaration-with-armenia>.

171 Svante E. Cornell, *Centripetal vs. Centrifugal Forces and Emergence of Middle Powers in Central Asia and the Caucasus*, Washington, DC: Central Asia–Caucasus Institute, June 2023, https://silkroadstudies.org/resources/pdf/SilkRoadPapers/2306-MiddlePowers-print_compressed.pdf.

172 The agreement that was signed is titled Agreement between the governments of the Republic of Azerbaijan, Republic of Kazakhstan and Republic of Uzbekistan on Strategic Partnership in the Development and Transmission of Green Energy. See “Baku hosted trilateral meeting between Presidents of Azerbaijan, Kazakhstan, and Uzbekistan,” *President.az*, 13 November 2024, <https://president.az/en/articles/view/67297>.

173 Rushana Aliakbarova, “A new energy bridge: Azerbaijan, Uzbekistan, and Kazakhstan unite for a Green Corridor to Europe,” *Euronews*, 15 July 2025, www.euronews.com/business/2025/07/15/a-new-energy-bridge-azerbaijan-uzbekistan-and-kazakhstan-unite-for-a-green-corridor-to-eur.

affairs.¹⁷⁴ As part of this effort, Uzbekistan is cooperating with Turkmenistan and Azerbaijan on an east–west connectivity project. During an August 2025 summit in Turkmenistan, the three states confirmed their joint intention of developing the Uzbekistan–Turkmenistan–Azerbaijan route of the Middle Corridor. To pursue this objective, special emphasis is placed on modernising and expanding the logistic infrastructure in the key ports of Turkmenbashi and Baku.¹⁷⁵ Developing trade-enabling soft infrastructure, such as unification of tariffs and customs and digitalisation of transport procedures, is also under discussion.

All states have much to gain from developing this east–west route. For gas-rich Turkmenistan, it could help diversify exports, which currently rely almost solely on pipelines to China. For Azerbaijan, it would further strengthen its role as transit and energy hub in the Trans-Caspian region. For Uzbekistan, it would offer closer integration into the Middle Corridor. Although Uzbekistan does not have direct access to the Caspian Sea, it connects to the Middle Corridor via the transport networks of Kazakhstan and Turkmenistan. The highly anticipated CKU railway mentioned above will further integrate Uzbekistan into the trade flows along the Middle Corridor, providing an alternative unimpeded southern artery of the corridor. Yet, developing the logistical infrastructure and aligning transport procedures are complex tasks that will take time.

North–South connectivity

The International North–South Transport Corridor (INSTC) is a multimodal freight corridor linking Russia, the Caucasus, Central Asia, Iran, the Persian Gulf, and South Asia. The route, launched by Russia, India, and Iran in 2000, is a strong priority for both Russia and Iran as they seek to alleviate the effects of international sanctions and compensate for dwindling access to Western markets.

Currently, there are three main branches of the INSTC: the western route through Azerbaijan, the trans-Caspian route via the Caspian Sea, and the eastern route through Central Asia, namely Kazakhstan and Turkmenistan, before connecting to Iran and onwards to the ports of the Persian Gulf. From there, it provides further access to India. This route remains relatively underdeveloped, but Kazakhstan and Turkmenistan are in discussions with Russia and Iran on improving infrastructure and coordination along the route.¹⁷⁶

174 Engaging Turkmenistan is particularly important for realising Uzbekistan’s transport strategy. See Nargiza Umarova, “Uzbekistan and Turkmenistan Are Forming a Transport and Transit Tandem,” *The Diplomat*, 18 November 2025, <https://thediplomat.com/2025/11/uzbekistan-and-turkmenistan-are-forming-a-transport-and-transit-tandem/>.

175 “Central Asia: Uzbekistan, Turkmenistan and Azerbaijan form a new transport alliance,” *Maili.uz*, 25 August 2025, <https://maili.uz/en/2025/08/25/transport-alliance-uzbekistan-turkmenistan-azerbaijan/>.

176 Emil Avdalani, “The International North–South Transport Corridor,” *Gulf Research Center*, August 2025, www.grc.net/single-commentary/302.

The Central Asian states are pursuing several additional north–south transport initiatives, with Afghanistan playing a key role in all of them. Indeed, if Azerbaijan is Central Asia’s gateway to the West, and therefore an integral part in all connectivity efforts spanning the Caspian, then Afghanistan is the key country in enabling the expansion of north–south connectivity. Central Asian states, particularly Kazakhstan and Uzbekistan, as well as Turkmenistan, are increasingly engaging Afghanistan to unlock transit potential to the south. In past decades, Afghanistan’s persistent security problems have been the main bottleneck hampering connectivity southwards. Since assuming power in Afghanistan, the Taliban has engaged with most Central Asian states on interregional transport projects.

In addition to the previously mentioned north-south corridor to Iran, Kazakhstan and Turkmenistan are exploring a faster route to Indian markets, via Afghanistan and Pakistan. The main proposed project is a railway line running from Turkmenistan’s border through Afghanistan and into Pakistan, providing access to seaports in Pakistan.¹⁷⁷ Obviously, the ambition to extend the corridor to India depends on the evolution of the relationship between India and Pakistan.

In parallel, Uzbekistan is seeking to carve out its own role in north–south connectivity. A trilateral Uzbekistan–Afghanistan–Pakistan cooperation framework has emerged to advance a Trans-Afghan railway connection. This project, sometimes referred to as the Kabul Corridor, provides a shorter route through Afghanistan to Pakistan compared to the route from Turkmenistan (647 km versus 926 km).¹⁷⁸ Uzbekistan has taken the lead in promoting the project to international partners, commissioning a feasibility study to map the exact route and assess the economic costs. For Uzbekistan, the strategic motivation is access to seaports in Pakistan, which would significantly shorten its routes to seaports.¹⁷⁹

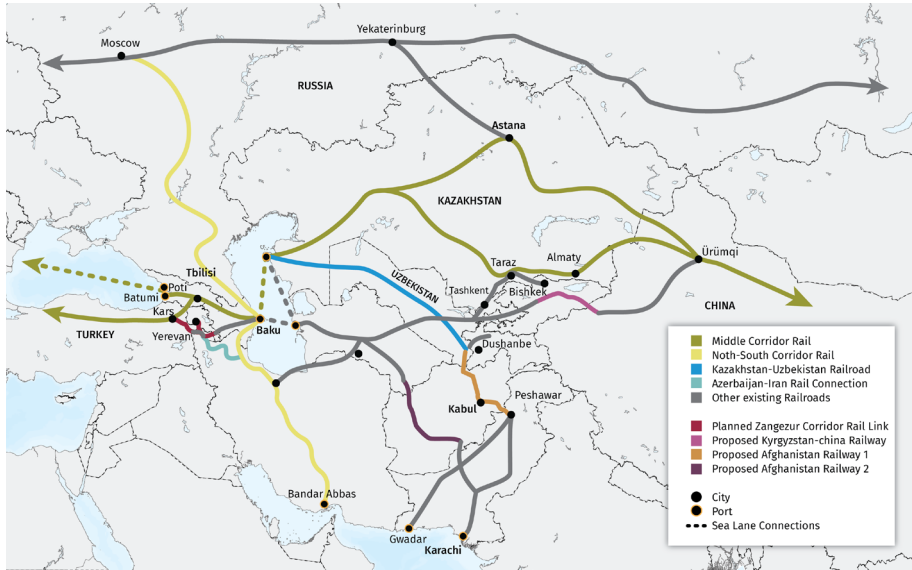
Significant obstacles remain before these projects can come to fruition. While political will exists among the Central Asian states, financial and technical assistance is still required. Moreover, the main challenge is the complex geopolitical situation and the uncertain security environment in and around Afghanistan. Additionally, the involvement of countries such as Russia, Iran, Afghanistan, and Pakistan in north–south trade makes Western countries cautious about engaging. Finally, the flurry of transport projects proposed and discussed within various cooperation formats risks generating competition among Central Asian states, particularly Kazakhstan

177 Saniya Sakenova, “Kazakhstan Signs Roadmap to Develop Eastern Route of North–South Corridor,” *Astana Times*, 22 July 2024, <https://astanatimes.com/2024/07/kazakhstan-signs-roadmap-to-develop-eastern-route-of-north-south-corridor/>.

178 Nargiza Umarova, “What the Extension of Transport Corridors in Afghanistan Means for Central Asia,” *Central Asia–Caucasus Analyst*, 12 March 2025, www.cacianalyst.org/resources/0307Nargiza_feature.pdf.

179 “Uzbekistan Accelerates Construction of Trans-Afghan Railway: Project Secures Political and Financial Backing,” *UZ Daily*, 22 July 2025, www.uzdaily.uz/en/uzbekistan-accelerates-construction-of-trans-afghan-railway-project-secures-political-and-financial-backing/. Today, Central Asia’s access to international maritime trade continues to be linked to distant Russian ports.

and Uzbekistan. Nevertheless, these initiatives demonstrate the region's growing agency. Rather than having projects imposed by external actors, whether Russia, China, or others, these projects are regionally driven. Map below illustrates existing and proposed east-west and north-south rail transport routes across Central Asia.



Map 2 Existing and proposed rail transport corridors in Central Asia

Source: Modified from Caspian Policy Center, 2025.

3.4 Speaking with one voice to the world

Enhanced regional cohesiveness is enabling the Central Asian states to engage with the world not only as individual nations, but as a united region. A format known as C5 Plus, or C5+1, denoting the five Central Asian states and a foreign counterpart, has been established, officially with no fewer than ten external partners, including both individual countries and organisations. The joint Central Asian approach, led by Kazakhstan and Uzbekistan, to key global partners has enhanced the region's international visibility and agency. Central Asia is increasingly becoming a region that foreign powers engage with without sowing intra-regional divisions, as often happened in the past.

3.4.1 Central Asia Plus

The first Central Asia Plus format was established between the five Central Asian states and Japan in 2004 with South Korea following suit in 2007. Thereafter, the European Union (2007), India (2012), the United States (2015), Russia (2019), China (2020), the Gulf Cooperation Council (2023), Germany (2025), and Italy (2025) have all established their own versions of the C5+1 format, (see Table 2).

Eventually, the formats have been accompanied by high-level summits. The inaugural Central Asia–Russia summit was held in Astana in 2022 and the first Central Asia–China summit was held in Xi’an in 2023. In 2025 alone, no less than six C5+1 summits took place with the EU, Italy, China, Russia, the US, and Japan. A planned summit with the Gulf states was postponed. Turkey is the only major external actor that does not have a C5+1 format with the region, seemingly content to interact within the more institutionalised OTS.

Table 2 C5+1 formats

Format	Main Focus	Established
C5+Japan	Development aid, infrastructure, education	2006
C5+South Korea	Technology, trade, green economy	2007
C5+US	Security, governance, connectivity	2015
C5+India	Trade, connectivity, cultural exchange	2012
C5+Russia	Regional security, energy	2019
C5+China	Belt and Road, infrastructure, trade	2020
C5+GCC	Energy, investment	2023
C5+EU	Sustainability, regional connectivity	2007
C5+Italy	Economic diplomacy	2025
C5+Germany	Energy transition, education	2023

The proliferation of these formats indicates that major actors acknowledge Central Asia as a single region of interaction, i.e., a distinct grouping of five states, and, following the inclusion of Azerbaijan, possibly six states.¹⁸⁰ The outside powers all have different interests in Central Asia, which have led to a significant variation in the C5+1 formats.

For instance, Russia’s version of the C5+1 is yet another format for Moscow to pursue its neo-imperial vision for Central Asia in combination with anti-Western messages to the Central Asian recipients. Russia’s relatively late arrival to the C5+1 format is explained by the failure to fully attract the Central Asian countries to

¹⁸⁰ Farkhod Tolipov, “The ‘C5+1’ on the Central Asian Geopolitical Chessboard,” *Horizons*, no. 27, Summer 2024, pp. 254–265.

its integration projects. In the words of experts from the Russian International Affairs Council:

Considering that only Kazakhstan and Kyrgyzstan are members of the Eurasian Union; Kazakhstan, Kyrgyzstan, and Tajikistan are members of the CSTO; and Turkmenistan generally has the status of ‘positive neutrality’; in what format can Russia discuss all these [transboundary] issues, if not in the ‘Russia + 5’ format?¹⁸¹

For Beijing, the C5+China format essentially serves as a specific region-wide branch of the BRI. C5+China appears to be the most “institutionalised” of the formats, having established a secretariat to further the joint agenda. For the US, the platform has traditionally combined security and economic engagement with normative issues such as democracy, human rights, and the rule of law. Under the Trump administration, however, it has become, for Washington, more of a platform for advancing US business engagement. For the Central Asian states, it has become a sort of regional umbrella beneath which they engage as a collective group with external partners while concomitantly securing individual agreements.¹⁸²

3.5 Institutionalisation and durability

Although the Central Asian states are coordinating policies through a rapidly expanding array of arrangements, encompassing more areas than ever, the region still stands out due to the lack of a strong regional structure. This raises the question of whether continued deepening of regional processes in Central Asia requires the establishment of a regional organisation of Central Asian states.

Both states envision turning the consultative meeting format into a permanently institutionalised governance structure in order to make the steps taken toward regional consolidation in the past years irreversible. The Uzbek president’s proposal for imparting a more durable character to regional cooperation is to establish a permanent secretariat that would rotate among the states. He also suggests transforming the current loose consultative meeting format into a regional body called the Community of Central Asia.¹⁸³

Thus far, Central Asian regionalism is essentially a top-down process, led primarily by the presidents of the region while lacking deeper participation of

181 Andrei Kazantsev, Aigul Kazhenova, “Novyi etap tsentralnoaziatskoi integratsii,” Russian International Affairs Council, 3 December 2019, <https://russiancouncil.ru/analytics-and-comments/analytics/novy-etalp-tsentralnoaziatskoy-integratsii/>.

182 Eric Rudenshiold, “Two Summits, One Pivot: Central Asia Steps into the Sun,” *The National Interest*, 21 November 2025, <https://nationalinterest.org/blog/silk-road-rivalries/two-summits-one-pivot-central-asia-steps-into-the-sun>.

183 “The President of Uzbekistan outlines priority areas for practical regional cooperation within the new format,” *President.uz*, 16 November 2025, <https://president.uz/en/lists/view/8675>.

citizens, businesses, and non-governmental actors. In fostering a growing sense of Central Asian identity, which Mirziyoyev has singled out as a priority, greater cross-country interaction and human-to-human contact on a grassroots level will be as important as official political meetings. Some steps in this direction are taking place: since 2023, all citizens of Kyrgyzstan and Uzbekistan have been able to visit each other using only their national ID cards. Uzbekistan is in the process of negotiating a similar arrangement with both Kazakhstan and Tajikistan.¹⁸⁴ Another idea, suggested by Kyrgyzstan's President Sadyr Japarov, is a unified visa system for Central Asia similar to the Schengen visa in Europe, which allows for free movement across the region.¹⁸⁵

The cooperative processes in Central Asia have reached such breadth that there is a burgeoning discussion on the pros and cons of various integration models. Inspiration is drawn from models as diverse as the EU, ASEAN, and the Nordic Council. Presidential advisor and director of the Uzbek government think-tank International Institute for Central Asia, Javlon Vakhobov, identifies three possible pathways for regional integration processes. Firstly, a continuation of the current trend, an inertial model, in which gradual cooperation occurs through regional projects, but without strong institutions. Secondly, institutionalised cooperation through a permanent secretariat, ministerial councils, etc., that can strengthen coordination and implementation of policies in critical joint areas of economy, transport, water, and energy. Thirdly, adaptive cooperation, in which progress in certain areas, such as transport and logistics combines with stagnation in sensitive areas of political cooperation.¹⁸⁶

According to Vakhobov, the first and last model risk being insufficient to meet common challenges amidst global instabilities, leaving the second model as the proposed Uzbek way forward. Overall, institutionalising Central Asian cooperation would help protect the progress accomplished from political changes within the region as well as potential external pressure.

3.5.1 Handling the smaller states

Whereas Kazakhstan and Uzbekistan envision a gradual institutionalisation of regional cooperation, there is a built-in challenge to Central Asian integration. The two larger states are driving the process while regional integration requires that the

184 "Uzbekistan and Kyrgyzstan citizens can cross the border with ID cards," *Government Portal of the Republic of Uzbekistan*, 30 January 2023, <https://old.gov.uz/en/news/view/36361>.

185 "Kyrgyzstan proposes unified visa for Central Asian countries," *Gazeta.uz*, 16 March 2025, www.gazeta.uz/en/2025/03/16/silk-road-visa/.

186 "CACI Webinar: A New Central Asia? From Past Attempts to Future Cooperation," *Central Asia-Caucasus Institute YouTube Channel*, 23 September 2025, www.youtube.com/watch?v=HeAAAddeU6I.

three smaller states—Kyrgyzstan, Tajikistan, and Turkmenistan—all mindful of their sovereignty and independence, also support the institutionalisation of these regional processes.¹⁸⁷ Kazakhstan and Uzbekistan, therefore, have to tread carefully so as not to dissuade Kyrgyzstan, Tajikistan, and Turkmenistan from participating.

These three countries are very different from one another. Kyrgyzstan, which traditionally has been the most liberal state in the region, tends to follow in the footsteps of Kazakhstan and Uzbekistan, and positions itself as a supporter of ever closer regional cooperation. Tajikistan is the poorest Central Asian country, and has turned into a highly authoritarian state. Political and economic reforms are entirely absent, thus, contrasting with the modernisation ambitions of Kazakhstan and Uzbekistan. Even more difficult to engage is traditionally neutral Turkmenistan. For a long time, it avoided all forms of regional cooperative processes, but has become increasingly active in project-based cooperation related to energy and transport. It nevertheless needs to be handled with special care. In the 2024 consultative meeting, the Turkmen President Serdar Berdimuhamedov argued that the meetings between the Central Asian leaders should remain consultative “without strictly regulating rules and procedures.”¹⁸⁸

In their relations with the smaller neighbours, Kazakhstan and Uzbekistan are pursuing closer bilateral cooperation with all of them, with a particular focus on pragmatic agreements to boost trade, investment, and infrastructure. On a regional level, both emphasise economic coordination over more sensitive political issues, thereby moderating the smaller states’ sensitivities related to political domination. While the approaches of Kazakhstan and Uzbekistan appear coordinated in presenting joint regional initiatives, they are also complementary. Kazakhstan primarily relies on its economic strength and critical role as a transit hub, whereas Uzbekistan takes a more political intra-regional role, as exemplified by its role in border settlement, reconciliation, and mediation under Mirziyoyev.

To alleviate potential fears of regionalism undermining the sovereignty of Central Asian states, the ongoing processes are driven by intergovernmental interaction and do not involve the creation of supranational institutions. According to Uzbekistan’s Mirziyoyev, “Integration should remain voluntary and pragmatic, aimed at practical results rather than creating supranational structures.”¹⁸⁹ Ultimately, then, institutionalisation necessitates an intergovernmental organisational structure based on consensus and respect for sovereignty. To avoid a backlash, and keep the

187 Johan Engvall and Svante E. Cornell, “How the Nordic Countries Can Engage Central Asia,” *The National Interest*, 29 July 2025, <https://nationalinterest.org/blog/silk-road-rivalries/how-the-nordic-countries-can-engage-central-asia>.

188 “Speech by the President of Turkmenistan Serdar Berdimuhamedov at the Sixth Consultative Meeting of the Heads of State of Central Asia,” Permanent Mission of Turkmenistan to the UN, 9 August 2024, <https://un.mission.gov.tm/news/135489>.

189 Shavkat Mirziyoyev, “Central Asia on the verge of a new era,” *President.uz*, 13 November 2025, <https://president.uz/en/lists/view/8653>.

smaller states engaged, enduring patience is required. In the words of an Uzbek expert, institutionalisation of regional cooperation must emerge “organically” since “we do not want our own Brexit.”¹⁹⁰

3.6 Emerging regionalism in Central Asia

The changes traced in this chapter indicate that Kazakhstan and Uzbekistan are now playing a central role in shaping an emerging regional order in Central Asia. The Kazakh–Uzbek axis of cooperation has moved toward a deliberative effort to define the region as a coherent political space with its own agency. Both governments envision a future where Central Asia acts as an identifiable and autonomous subject in international affairs. The political understanding forged between Astana and Tashkent has created conditions in which other regional states can align more easily and participate in region-wide initiatives without the zero-sum constraints of earlier decades.

Several building blocks of this emerging order can be identified. At the core lies the Kazakh–Uzbek tandem, which has become a stabilising factor as well as a source of regional agenda-setting capacity. Surrounding this is a layer of regular region-wide consultative meetings among leaders of all Central Asian states, which provides a flexible platform for coordination. A further layer comprises issue-specific, often trilateral arrangements on borders, water, energy, and connectivity. These collaborative formats are practical and project-driven. For example, the enhancement of east–west and north–south transport corridors is giving the regional states a shared stake in developing cross-border infrastructure and external economic links. Finally, the various C5+1 formats have elevated the region’s international visibility and allowed the five states to engage major partners collectively. Figure 2 visualises these layers of cooperation.

At the same time, the ambition to build regional order from within is exposed to several constraints. Differences in economic weight and external alignments place certain limits on what can be agreed at the regional level. Some of the most sensitive issues, especially water allocation and the energy–agriculture nexus, require long-term adjustments that are politically difficult for all governments involved. Connectivity projects face financing gaps, coordination challenges, and security uncertainties, not least in relation to Afghanistan.

The process of building regionalism also remains essentially elite-driven. The development of a truly regional identity will depend on whether cooperation can move beyond high-level political dialogue to naturally include business, expert, and people-to-people contacts. An additional question concerns institutionalisation of

190 Author’s discussions with an Uzbek expert, Tashkent, April 2025.

regional cooperation. Ultimately, this refers to whether the current mix of leader-driven and ad hoc arrangements will suffice over time or whether a permanent regional cooperation structure will be necessary to sustain the process as agendas become more complex.

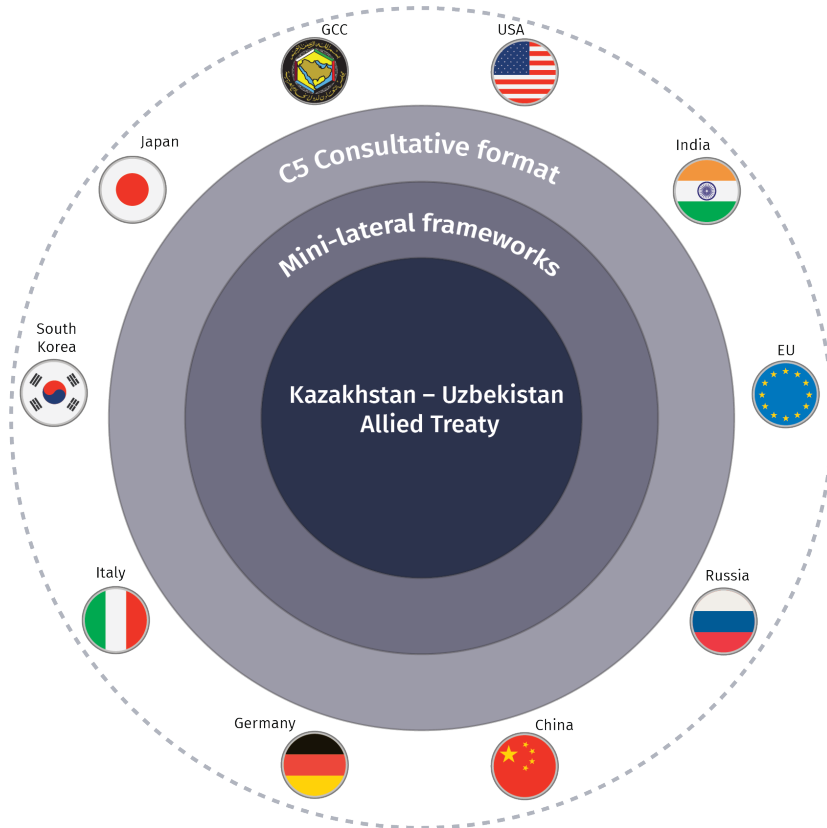


Figure 2 Layers of cooperation in Central Asia.

4. Conclusion

THIS REPORT ANALYSES HOW Kazakhstan and Uzbekistan are crafting a new role for Central Asia in an evolving multipolar world. Two questions guide the analysis: How do Kazakhstan and Uzbekistan interpret and adapt to the dynamics of multipolarity in their relations with external powers? What regional approaches do Kazakhstan and Uzbekistan pursue to enhance Central Asia's agency in a multipolar world? The analysis demonstrates the following key findings:

- While walking a fine line trying to manage the various poles of attraction, Kazakhstan and Uzbekistan are trying to maximise the economic, diplomatic, and security benefits by engaging with all external actors that demonstrate an interest in the region. Currently, the prospects for a flourishing multi-vector foreign policy are aided by a geopolitical environment in which none of the major outside powers are able, or willing, to truly assert hegemonic dominance. Thus, the lack of consistent strategies toward the region from external powers allows Kazakhstan and Uzbekistan greater freedom of manoeuvre.
- In their foreign policies, they are looking for pragmatic partnerships with external actors on the basis of shared interests. A transactional approach is favoured over normatively based diplomacy. Located at the crossroads of trade routes and sandwiched between great powers, the region has an ingrained political culture that prioritises bargaining and exchange rather than building diplomatic relations around shared values or principles.
- The emerging reality on the ground in Central Asia is one in which the key states, Kazakhstan and Uzbekistan, are coming together and actively shaping the contours of a new regional order. The ambition is to develop the Central Asian region as a distinct and independent subject of world politics. The increasing regional agency observable in Central Asia is aided by patterns of convergence in terms of shared norms of sovereignty, stability, and non-alignment.
- Kazakhstan and Uzbekistan have set their sights on making these regional processes permanent by gradually moving from ad hoc cooperation to regional governance structures. However, they are aware of potential backlash from forcing this upon their smaller neighbours, and are therefore prepared to let it evolve organically. The proposals put forward by the presidents of Kazakhstan and

Uzbekistan are nevertheless increasingly bold. The symbolic value of regional identity, and the ability to present “Central Asia as one,” is visible in the regional states’ ability to engage major powers in all directions jointly rather than as disparate states that can be played off against one another.

The study’s findings hold the following principal implications:

- Central Asian states’ reluctance to choose sides in a multipolar world underlines that any lingering Western hopes of drawing the region into alignment against Russia are unrealistic. As Central Asia’s importance to Moscow grows, regional leaders are positioning themselves to capitalise on this opportunity by seeking a diversity of option and strengthened bargaining power rather than aligning with a Western camp. Partnerships with Western countries therefore allow them greater independence and sovereignty vis-à-vis Russia and China, but avoids unconditional alignment with the West. Pragmatic engagement consistently trumps ideological affinity.
- In Central Asia, regional agenda-setting is increasingly displacing the plans of external powers in shaping regional development. The governments of Kazakhstan and Uzbekistan are asserting greater control over policy agendas, whether on connectivity, energy, trade, or security. This ongoing shift reflects growing regional confidence, stronger intra-regional coordination, and a shared desire to manage external influence on their own terms.
- The growing strategic importance of Central Asia is primarily driven by external dynamics, related to Russia’s war in Ukraine, economic warfare between Russia and the West, and US–China rivalries. Thus, the ability of regional states to engage with outside powers depends on the attention those powers are willing to devote to the region. In a rapidly changing world, it is far from certain that the current level of external interest will continue. Previous episodes of heightened attention to Central Asia serve as a cautionary tale. For example, during the US-led “war on terror” in Afghanistan, Central Asia’s importance increased, and the region became a partner in that campaign. However, when US interest in Afghanistan waned, so did its willingness to engage with the Central Asian states.
- A dual process of inward consolidation and outward expansion is reshaping the contours of a greater Central Asian region. Internally, the Central Asian states are strengthening cooperation and unity, while externally they are broadening the region’s boundaries westwards by including Azerbaijan. The deepening ties between Central Asia and the South Caucasus, spurred by energy

transit, connectivity projects, and similar foreign policy outlooks, accentuate how the eastern and western sides of the Caspian Sea are merging into an interconnected geopolitical space. To the south, Afghanistan, while problematic, is increasingly recognised as intrinsically linked to the region in both economic and security terms.

In closing, Central Asia can no longer be reduced to a post-Soviet backwater. It is intimately connected to global geopolitics. Conventional depictions of Central Asian countries as mere pawns in great power politics are outdated and no longer reflect the reality on the ground. To mitigate the risks of falling prey to the agendas of outside powers, Kazakhstan and Uzbekistan are working to build a coherent, stable, and dynamic region from the inside out. Thus, the future of Central Asia will depend not only on the reconfiguration of external forces due to geopolitical competition but also on intra-regional development, particularly evolving regional cooperation.

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