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EU engagement in Central Asia: a reality check

Key findings

- Russia's war in Ukraine has not fundamentally reshaped the power balance in Central Asia: the region continues to navigate between the major powers.
- Russia remains the key political and security actor in the region and wields strong economic leverage, even though its traditionally strong soft power is declining.
- China's strong economic influence and rising soft power are accompanied by a push to embed its own technologies and standards in order to align Central Asia structurally with a China-centric technical ecosystem.
- The EU, despite being the region's largest foreign investor, has been struggling to attain visibility on the ground. Its increased attention to the region is viewed in the context of renewed great-power rivalry and the diversification of supply chains. Democracy, the rule of law and human rights remain Europe's distinctive assets and core drivers of its soft power in Central Asia.
- Regional cooperation is gaining momentum in Central Asia for the first time in decades, allowing for more cross-border trade, joint ventures, free travel and expert exchanges.

Key recommendations

Interests plus values

- The EU's increasingly pragmatic, interest-driven approach should not be at the expense of democratic values. The EU should speak out more consistently against authoritarian practices in Central Asia and stop turning a blind eye to repression as the alleged »price« of pragmatic cooperation. Long-term stability and reliable economic partnerships depend on predictable, accountable governance.
- The EU is a major development aid provider in the region and could gain additional influence by stepping into the void left by USAID. It should also invest in skilled labour by promoting vocational training in accordance with European standards.

Economy and trade

- When partnering with Central Asian governments on raw material extraction, the EU should expand investment in local processing so that added value stays in Central Asia.
- The EU could consider harnessing synergies with China in Central Asia. Cooperation with China on joint development projects in Central Asia could serve shared interests, for example by investing in complementary infrastructure along the Middle Corridor. China could focus on hard infrastructure, such as roads and ports, while the EU could focus on soft infrastructure, such as logistics, trade harmonisation and operational know-how. This way, the EU would embed higher quality requirements and interoperability along the corridor and also help prevent the displacement of European technical norms.

Water management

- Building on its reputation as a politically neutral, high-quality technical actor, the EU should encourage and technically support fair and inclusive cross-border cooperation on shared water resources between upstream and downstream countries in Central Asia.

Introduction

When Russia invaded Ukraine in February 2022, Central Asian countries – traditional allies of Moscow – did not support Russia's war effort and tried to distance themselves from the Kremlin and its aggression. This unexpected move was widely interpreted as a sign of Russia's weakening influence in its southern neighbourhood and drew renewed attention from other international actors.

Central Asia thus found itself in the diplomatic spotlight. There was a flurry of high-level meetings, including an impressive summit with China in Xi'an in 2023 and the first-ever summit with then US president Joe Biden in New York in 2023.

The European Union also held its first-ever summit with five Central Asian leaders in 2025 and began to look more closely at Central Asia's growing geopolitical significance, its mineral reserves and its role as a corridor for alternative transport routes between China and Europe.

But has the regional balance of power in Central Asia really changed? This paper seeks to provide a reality check and offers recommendations for European policymakers and practitioners.

We will first map the dominant trends and the role of major foreign actors in the region. On this basis we will then outline promising areas of EU engagement, zooming in on the topics of economic connectivity and transboundary water management.

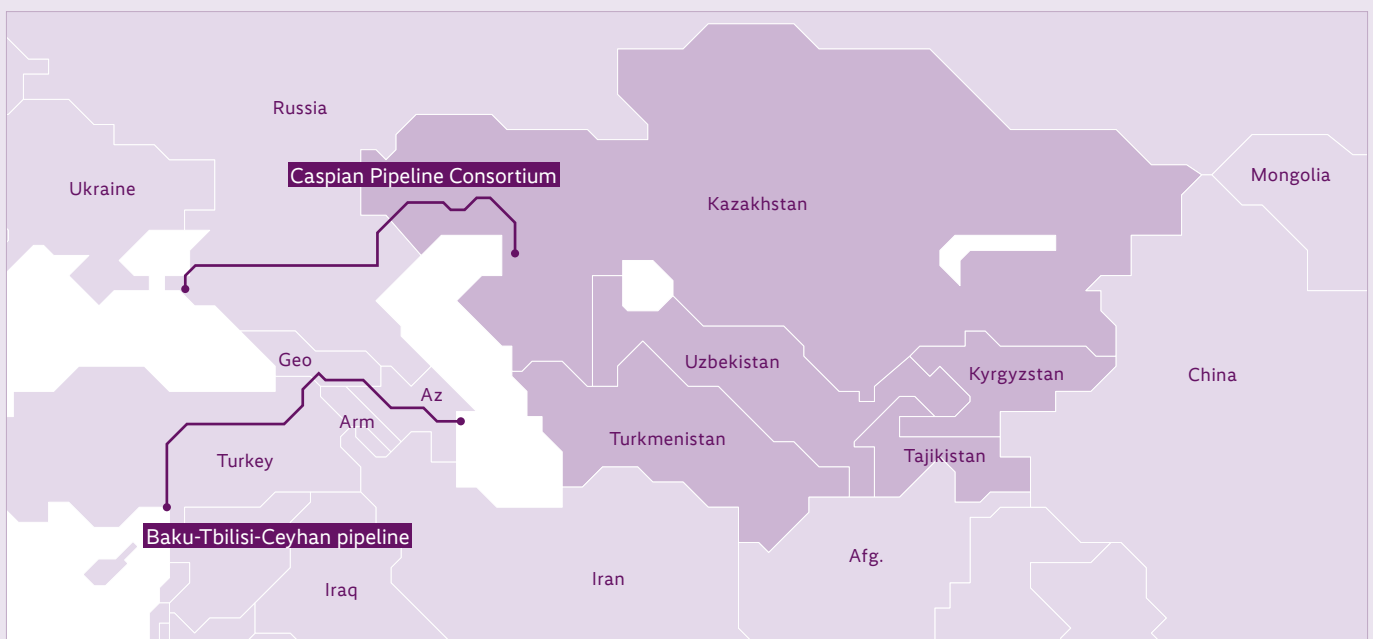
Methodology






The study is based on over forty anonymous interviews with experts and policymakers conducted in June 2025 in Kazakhstan (Astana and Almaty), Kyrgyzstan (Bishkek) and Uzbekistan (Tashkent), as well as in Vienna and Berlin.

These three countries were selected because they are perhaps the most dynamic and consequential actors in Central Asia today.

The research builds on previous fieldwork in the [South Caucasus](#) carried out in 2024, which examined similar questions of shifting regional alignments and external engagement.

The text also contains a number of thematic boxes that provide background information on the role of the OSCE in Central Asia, on sanctions evasion and country-specific context.



 Kazakhstan	 Kyrgyzstan	 Tajikistan	 Turkmenistan	 Uzbekistan
GDP 288 bln USD	GDP 17 bln USD	GDP 14 bln USD	GDP 64 bln USD	GDP 115 bln USD
Population 20.6 mln	Population 7.2 mln	Population 10.6 mln	Population 7.5 mln	Population 36.4 mln
Memberships OSCE, EAEU, CSTO, SCO	Memberships OSCE, EAEU, CSTO, SCO	Memberships OSCE, CSTO, SCO	Memberships OSCE	Memberships OSCE, SCO
Downstream country	Upstream country	Upstream country	Downstream country	Downstream country

Central Asia is far from homogeneous. **Kazakhstan**, vast and resource-rich, remains the region’s heavyweight, underpinned by oil and mineral wealth. **Uzbekistan**, the region’s most populous state, has been catching up economically over the past decade. **Kyrgyzstan**, much smaller and far less wealthy, was long viewed as Central Asia’s most pluralistic state and a hub for civil society,

but this has changed drastically in recent years. **Tajikistan**, bordering Afghanistan, remains among the world’s lowest-income countries. **Turkmenistan** boasts the fourth-largest natural gas reserves in the world and continues to be one of the most closed, repressive and isolated regimes globally. Its state revenue relies mainly on the export of gas to China.

Reality check

The war is not a game changer

Russia's war against Ukraine has not fundamentally altered long-standing power dynamics in Central Asia. The region continues to navigate between major powers in an evolving landscape, displaying own-agency and trying to make good use of its limited room for geopolitical manoeuvring. Russia, although characterised as a declining power, remains the dominant political and military actor, and retains significant economic leverage across the region. China has consolidated its role as a rising power and a major economic player, while European political and economic influence remains relatively modest.

The war in Ukraine is observed in Central Asia with considerable unease but does not dominate domestic or regional agendas. In the early months, it raised concerns about national sovereignty, particularly in Kazakhstan, given its extensive border with Russia and substantial Russian-speaking minority. Following Ukrainian incursions into Russia's Kursk region, fears also surfaced that Moscow might attempt to draw Kazakhstan or Kyrgyzstan into the war against Ukraine through the Collective Security Treaty Organization (CSTO).

Regional leaders have responded to the war with calibrated caution, aiming to distance themselves from Russia without creating the impression of turning their backs on their

traditional ally. None supported the war, but all abstained or did not vote on UN General Assembly resolutions condemning Russia's actions. At the same time, all five Central Asian states refrained from recognising any of Russia's territorial gains in Ukraine or even explicitly called for non-recognition (just as they did not recognise the annexation of Crimea).

Central Asia's strong reliance on Russia's economy and logistics meant that the region was hit hard by the immediate effects of the war, especially rising food and energy prices. Central Asia also suffered from the initial economic downturn in Russia in the wake of sanctions. At the same time, relocation of numerous Russian businesses to Central Asia gave a boost to local economies, while Kyrgyzstan and Kazakhstan emerged as key intermediaries for sanctions evasion.

Public sentiment across Central Asia has traditionally been favourable towards Russia, even after the annexation of Crimea. Since Russia's invasion of Ukraine, it has remained relatively stable, with the notable exception of Kazakhstan, where unfavourable views surged. Nevertheless, even in Kazakhstan a strong majority would prefer their country to find a balanced **position between** Russia and China. Overall, the war, although closely watched, does not seem to be a central topic of discussion, although reliable polling data remain scarce.

Box 1

Sanctions evasion

When Russia invaded Ukraine in February 2022, European countries and their allies imposed a wave of sanctions on Russia. Central Asian countries did not join in, but promised to comply. However, already in May 2022 Russia allowed »parallel imports«, which made it possible for goods destined for foreign markets to be brought into Russia without approval from trademark owners. As a result, many goods covered by sanctions continued to enter the country, often through Central Asia and the South Caucasus (benefiting from the customs union within the Eurasian Economic Union).

Skyrocketing trade turnover indicates that Central Asian countries may be complicit in sanctions evasion, making many local entrepreneurs indirect beneficiaries of the war. Notably, this trade benefits not only Central Asia and Russia, but also EU vendors. For example, in 2023 Kyrgyzstan imported vehicles from the EU worth fourteen times more than in 2021, according to UN Comtrade data. During the same period of time, exports of vehicles to

*Russia and Belarus surged, indicating re-export. For certain product categories Kazakh or Kyrgyz exports to Russia increased many times over, in some cases by a factor of hundreds. Kyrgyz and Kazakh companies have re-exported sanctioned dual-use high-tech products, including electronics, aircraft, helicopter and drone parts produced by Western companies. A Radio Free Europe **investigation** found that sanction circumvention often involves shell companies, so that dual-use goods from the United States or Europe are delivered directly to Russian clients without even travelling through Central Asia.*

Local public officials insist, including in interviews conducted for this study, that they are complying with the sanctions regime and that any violations may be attributed to individual entrepreneurs. In any case, the fight against sanctions circumvention schemes and routes is increasingly moving up the agenda of Western policy-makers.

This cautious stance toward Russia does not necessarily translate into public support for the war, however. In fact, visible grassroots initiatives such as crowdfunded humanitarian aid for Ukraine, particularly in [Kazakhstan](#), but also in [Uzbekistan and Kyrgyzstan](#), suggest that segments of society have sought ways to express solidarity with Ukraine within the limits of what is politically and economically feasible.

Regional cooperation is gaining substance

Regional cooperation is gaining momentum in Central Asia for the first time in decades. After many [failed attempts to establish a regional organisation](#), the past few years have been hailed as a »golden age« of cooperation. This represents a qualitatively new phenomenon, backed by financial investments and mutual benefits.

The progress became possible following the leadership change and opening up in Uzbekistan in 2016. It was accompanied by the gradual resolution of territorial disputes between Uzbekistan, Kyrgyzstan and Tajikistan, culminating in a historic border agreement between Tajikistan and Kyrgyzstan in early 2025. Additionally, disruptions in the international security system, including the fallout from Russia's war in Ukraine, have driven the Central Asian countries closer together. Most cooperation takes place between Kazakhstan, Uzbekistan and Kyrgyzstan, while Tajikistan and Turkmenistan remain cautious. Travel has been eased by open borders, allowing citizens to move visa-free across Central Asia (except in Turkmenistan), using national IDs. Expert exchanges, joint research and conferences have all

increased. Intra-regional trade [doubled between 2017 and 2024](#). Countries are also planning to facilitate cross-border trade further, for example with electronic tracking systems for goods. Businesses and joint ventures are flourishing. There is cooperation between security and intelligence services.

This renewed Central Asian regionalism is approached cautiously, however. Local leaders are reluctant to pool sovereignty, prefer cautious incremental steps and emphasise »cooperation« rather than »integration«. They prioritise nation-building over power-sharing and sometimes use cooperation to stabilise their own regimes. With few formal institutions to sustain collaboration, progress often depends on the goodwill of individual leaders, making cooperation largely top-down. Politically sensitive topics, such as water resource management, are therefore kept off the agenda and are not tackled multilaterally at the highest political level. Moreover, Russian-led regional organisations, such as the CSTO and the Eurasian Economic Union, continue to divide the region because not all states are members.

Russia remains crucial but has lost soft power

Russia's dominant position in Central Asia is a legacy of Soviet times. Despite gradually losing economic clout over the three decades since the collapse of the Soviet Union, Russia remains a key security actor and indispensable political partner in the region. Close ties with Russia are widely viewed as inevitable, rooted in geography, shared history and deep economic and political interdependence. Central Asian leaders therefore maintain regular contact with Pres-

Box 2

Multivector foreign policy?

In discussions with policymakers and experts across Central Asia, the notion of a »multivector foreign policy« emerges frequently. According to the prevailing narrative, the region welcomes engagement from all external actors based on the principle »first come, first served«. This approach is portrayed as one of pragmatic synergy, an effort to keep multiple options open and prevent dependence on any single power. At times, this balancing act is described as a form of non-alignment: Central Asian states refrain from joining either the EU's anti-Russian policies, Russia's anti-Western stances, or US attempts to counter China.

However, the proclaimed neutrality appears largely rhetorical. It rather points to the region's limited room for political manoeuvre. In practice, autonomy is limited, particularly for Kazakhstan and Kyrgyzstan, which are members of both a military alliance (the CSTO) and a customs union with Russia (the Eurasian Economic Union).

Nonetheless, Central Asian states are occasionally able to exploit the small wiggle room they have. Several recent high-level Chinese visits are cited by Kazakh interlocutors as examples of successful diplomatic balancing.

Following the January 2022 unrest in Kazakhstan, Chinese Foreign Minister Wang Yi made a brief stop in Astana en route to Moscow, a visit that possibly contributed to the rapid withdrawal of CSTO troops from Kazakh territory. Later that year, President Xi Jinping's unprecedented six-hour stopover in Astana, ahead of the China-Central Asia summit in Samarkand, carried even greater symbolic weight. His meeting with President Tokayev and his public statement affirming China's support for Kazakhstan's territorial integrity were widely read as an informal »security guarantee« and a pointed message to President Putin.

ident Putin and seek to preserve stable and pragmatic neighbourly ties. They remain keenly aware of both their countries' vulnerabilities vis-à-vis Russia and the benefits of cooperation, and generally aim to prevent any deterioration in bilateral relations, while carefully avoiding overt support for Russia's war on Ukraine.

Moscow's strongest leverage in Central Asia is *political*. Russia is still perceived as a guarantor of regime stability, a role demonstrated most visibly by the swift CSTO intervention that helped to stabilise President Tokayev's government in Kazakhstan during the January 2022 unrest, when members of the old elite linked to the Nazarbayev network reportedly attempted a coup. Uzbekistan's president Shavkat Mirziyoyev, who succeeded Islam Karimov after his death in 2016, is often described as benefiting from Putin's endorsement. Despite the strains of its war effort, Russia has intensified its regional engagement, as reflected in a surge of high-level visits and communications. This outreach has also come with heightened expectations of loyalty. In Kyrgyzstan, a court-approved ban on protests was introduced in central areas of Bishkek in spring 2022 following a request from the Russian embassy to stop anti-war protests outside its premises. Across Central Asia, governments have increasingly adopted measures that resemble elements of Russia's authoritarian governance model, including tighter controls on civil society and foreign-funded organisations, often as means of tackling broadly similar, yet country- and society-specific regime-survival needs.

Russia's *military leverage* is one of the key drivers of its continued influence over Central Asian states. Kazakhstan, Kyrgyzstan, Tajikistan and, to a somewhat smaller extent, Uzbekistan, depend heavily on Russian arms supplies, joint military training and officer education. Russian bases are present across the region, and intelligence-sharing remains routine. This military dependence has fostered deep institutional entanglement within the security sectors of the Central Asian states.

Economic dependence adds another dimension to Russia's influence. In Kazakhstan, a significant proportion of internet traffic passes through Russia, thus giving Moscow the capacity to disrupt connectivity. Kazakhstan's oil exports to

Europe, 80% of its total oil exports and a vital source of revenue, remain vulnerable as they rely on the Caspian Pipeline Consortium route that traverses Russian territory from the northern Caspian oil fields to the Black Sea port of Novorossiysk. Russia can also exploit trade restrictions, as seen in earlier episodes in which sanitary and phytosanitary controls were used to disrupt critical Kazakh exports, such as wheat. Uzbekistan, Kyrgyzstan and Tajikistan all depend on *remittances* from labour migrants working in Russia, which constitute a lifeline for many households and their national economies. For example, every tenth Tajik citizen works in Russia, with remittances making up roughly half of Tajik GDP.

This dependence is also partly mutual, however. Beyond Central Asian countries' role as international partners and potential channels for sanction circumvention, Russia also relies heavily on them as a major source of migrant labour. Due to chronic labour shortages caused by adverse demographic trends and exacerbated by the ongoing war in Ukraine, Russia depends on workers from Uzbekistan, Kyrgyzstan and Tajikistan to fill gaps in sectors such as construction, services and elderly care.

While Russia's hard power in Central Asia remains formidable, its *soft power* is in decline. On one hand, Russia still benefits from deep cultural and linguistic embeddedness: many Central Asians speak Russian as a second – and sometimes even first – language, study in Russian-language schools, consume Russian media and have relatives working in Russia. These links have historically translated into broadly favourable public sentiment towards Russia. Regular exposure to Russian media continues to correlate with *more positive perceptions*, and in some quarters sympathy for Putin endures, driven by admiration for his rhetoric on »traditional values« and opposition to, for example, LGBTQ+ rights. Russian narratives resonate particularly in more conservative and rural communities. Putin's strategic use of pro-Palestinian messaging has likewise strengthened his appeal among parts of Muslim societies.

On the other hand, Russia has clearly become much less attractive since 2022. More than the war, however, the Russian backlash against Central Asian migrants after the terrorist attack at Moscow's Crocus City music hall in 2024 contributed to the decline of Russia's soft power. The attack was one of the deadliest incidents since the Chechen wars and killed 149 people. Russian authorities blamed 19 Tajik nationals allegedly linked to an ISIS faction. The attack triggered the tightening of migration regulations as well as a wave of xenophobia, open discrimination and even violence against Central Asian migrant workers in Russia. The hostility soon extended beyond the diaspora: academics from Kazakhstan, Kyrgyzstan and Uzbekistan reported difficulties at Russian border crossings and instances of prejudice during conference visits. These developments have fuelled a broader perception that Russia is becoming a less welcoming – and less predictable – partner.

Matrix of power in Central Asia

	Soft power	Hard power
EU	High, going down	Low, consistent
Russia	High, going down	High, consistent
China	Low, going up	Low, going up

Role of the OSCE in Central Asia

Central Asia is an important region for the Organization for Security and Co-operation in Europe (OSCE), which is a unique player in the region. No other regional organisation counts all five Central Asian states as members. The OSCE has been engaged in Central Asia for more than two decades, with field presences in all five states and the OSCE Academy located in Bishkek, Kyrgyzstan. The Academy is a post-graduate educational institution that serves as a regional centre for academic exchange and professional training, and as a think tank for OSCE- and security-related topics. In 2010, during Kazakhstan's chairmanship, the last summit of OSCE heads of state took place in Astana and concluded with the adoption of the Astana Declaration.

The OSCE's field operations function under mandates that require the consensus approval of all 57 participating states. In Central Asia, governments have often sought to limit the OSCE's focus on human rights, preferring to cooperate on the politico-military dimension and the economic and environmental dimension. The human dimension touches on the core of domestic power structures and is therefore considered politically sensitive.

The preference to limit it was evident during Kazakhstan's OSCE chairmanship in 2010, the only Central Asian chairmanship, under which issues related to the human dimension were given low priority.

In 2017, at the request of the host governments, the mandates of the OSCE field presences in Kyrgyzstan and Tajikistan were revised and downgraded to »Programme Offices«. As a result, OSCE engagement has become more restricted and increasingly technical rather than political in nature, and is carried out with modest budgets.

Central Asian states are particularly willing to engage in the OSCE's politico-military dimension of security, for example exchanging views and best practices on terrorism threats or welcoming capacity building on border management or modernisation of penitentiary facilities. The economic and environmental dimension of the OSCE are especially important as the region faces intersecting socio-economic vulnerabilities and increasingly severe impacts of climate change and broader environmental stressors, such as the degradation of the Aral Sea or water distribution problems. Project examples include trans-boundary cooperation between water basin councils, training for Kazakh coastal guards or improvement of the technical, environmental and safety standards of ships carrying cargo over the Caspian Sea. OSCE technical engagement seems appreciated because it is perceived as neutral.

Chinese influence is on the rise

For China, Central Asia serves as a vital resource base and strategic buffer. Beijing's primary interest lies in ensuring the region's stability, which it sees as essential for containing unrest in its own western provinces and safeguarding alternative overland trade routes. In Chinese strategic thinking, Central Asia also functions as a contingency corridor in case maritime chokepoints such as the Strait of Malacca are disrupted.

China's influence in Central Asia has grown steadily over recent decades, and it has emerged as a major economic actor in the region. Today, China is the largest trading partner of all Central Asian states except Kazakhstan, having surpassed Russia in overall trade volume. Chinese investment is likewise substantial. In Kyrgyzstan and Tajikistan, for example, Chinese companies play a key role in developing transport and transit infrastructure; Chinese construction firms frequently secure major contracts financed through state budgets in Bishkek and Dushanbe, as well as through international financial institutions. In Turkmenistan, China accounts for more than 70% of its gas exports. The renewable-energy sector across Central Asia is similar-

ly shaped by Chinese enterprises, while Chinese-made electric cars have come to define urban transport in the region.

Nonetheless, the European Union is still by far the largest investor in Central Asia, responsible for more than 40% of all FDI if EU institutional investment and the investments of Member States are combined. Russian investment is also significant, and FDI inflows from Russia increased after the outbreak of the war, partly driven by the relocation of Russian companies and capital to Central Asia.

From Beijing's perspective, Kazakhstan is the primary partner in Central Asia and a critical node in transcontinental trade. It was in Kazakhstan that China first announced the One Belt, One Road Initiative, later known as the Belt and Road Initiative (BRI). The bulk of regional BRI-related investment still flows through Kazakhstan, underscoring its centrality to China's connectivity vision. Symbolically, President Xi Jinping chose Kazakhstan for his first foreign visit after the COVID-19 pandemic, reaffirming the strategic importance of relations between the two countries. They share a pragmatic alignment on the war in Ukraine, avoiding open criticism of Russia while abstaining from openly endorsing its actions.

Central Asian authorities often view cooperation with China as politically convenient. Chinese partners are flexible, refrain from commenting on domestic politics and provide financing without demanding reforms. For many elites, this makes China an appealing »money bag«, as one interlocutor observed. Investments also often come with substantial kickbacks, feeding local patronage networks and reinforcing entrenched corruption. Such conditions often make Chinese funding more attractive than the stricter terms attached to Japanese or European investments.

Meanwhile, Chinese *soft power* has quietly expanded, even against the backdrop of enduring Sinophobia. Consumer preferences are shifting as Chinese products and technologies gain popularity. The widespread presence of Chinese electric cars projects an image of modernity and accessibility, while digital habits are evolving in ways that further embed Chinese influence. In Kyrgyzstan, for example, users are increasingly migrating from Russian e-commerce platforms, such as Ozon and Wildberries, to Chinese alternatives such as Taobao and Temu. This shift illustrates a gradual process of technological displacement, in which Russian and European products – the latter often more expensive and less available – are being replaced by more affordable, and increasingly competitive, Chinese technologies.

In this context, European policymakers should pay attention to the new Chinese vocational training initiative called [Luban workshops](#). It exemplifies the recalibration of Chinese strategy away from extractive investments to the re-

gion's industrialisation and local jobs. It also constitutes an attempt to repair Beijing's image and do things better after years of protests over its opaque and environmentally harmful investments, exacerbated by fears of land grabbing and widespread dismay over the treatment of Turkic Muslims in Xinjiang. Luban workshops provide technical education in high-tech sectors such as electric vehicles, AI, automation or hydropower in accordance with Chinese standards. Framed by Chinese officials as a shift from »China the builder« to »China the trainer«, these training centres are tailored to demonstrate responsiveness to local needs and address concrete socio-economic gaps such as youth unemployment or skills shortages.

For the EU, this model potentially carries risks that go beyond benign capacity-building. Luban workshops embed Chinese equipment, software and technical standards in the training of the next generation of Central Asian engineers, technicians and regulators. For example in Kazakhstan, the electric vehicle curriculum is supplied entirely by a Chinese vocational institution and training is delivered by Chinese technicians. This may lay the groundwork for a structural lock-in to a China-centric technical ecosystem, with standards, supply chains and regulatory expectations increasingly aligned with Chinese rather than with European benchmarks. In the future, this may marginalise European firms that operate on different technical standards, potentially deepening a regulatory and technological fault-line between a Chinese-centric space and the European market.

Areas of engagement for the EU

Following Russia's invasion of Ukraine and the subsequent disruption of global supply chains, the European Union has come to attribute much more strategic importance to Central Asia. This shift was demonstrated at the first-ever EU-Central Asia Summit in Samarkand in April 2025, in the presence of the leaders of all five Central Asian states. Priority areas for cooperation include transport connectivity, particularly through the Trans-Caspian Corridor, as well as critical raw materials, clean energy and digital connectivity. As part of this agenda, the EU has deepened its bilateral engagement, for example by signing memoranda of understanding on critical minerals with Kazakhstan and Uzbekistan, and by establishing a strategic partnership with Kazakhstan covering raw materials, batteries and renewable hydrogen.

Despite this growing engagement, the European Union remains only one actor among several in Central Asia. Although it is considered a high-quality economic actor, it is not seen as a particularly consistent or reliable one. Many still expect the EU's renewed interest in Central Asia to be short-lived and driven mainly by Russia's isolation and broader geopolitical rivalry, as well as by the EU's declining leverage over natural resources in other regions, such as Africa, rather than by a commitment to long-term engagement and stable investment.

At the same time, there is a perception in the region that the EU continues to view Central Asia largely through the lens of Russia, implicitly treating it as »Russia's backyard«. Central Asian states, however, no longer approach the relationship as inherently asymmetrical: many increasingly recognise their own agency and bargaining power and are conscious of the wide range of available partners, including China, Turkey, South Korea and India. Against this backdrop, they expect the EU to make more effective use of its comparative advantages, particularly in innovation and technology.

Interestingly, the EU, despite being the region's largest foreign investor, is often viewed as barely visible in Central Asia. This was reflected in the views expressed by this study's interlocutors and is also supported by [studies of perceptions](#) in Central Asian societies. By contrast, China's presence is frequently experienced through concrete projects, especially when it comes to construction and transport infrastructure. This makes its role easier to »see«, even when aggregate investment stocks suggest a more complex picture.

With regard to the EU, this visibility gap highlights the importance of capitalising on its own strengths. The EU's engagement in Central Asia will be most effective when it strengthens regional cooperation and connectivity by promoting high regulatory standards, supporting the rule of

law and good governance, ensuring labour and social safeguards, and encouraging environmental sustainability. These are all priorities that are explicitly reflected in the EU's 2019 Central Asia strategy. However, Russia's invasion of Ukraine in 2022, the return of great-power rivalry and the securitisation of supply chains have marked a shift in EU external action. Especially following the 2025 EU-Central Asia Summit, commentators noted that the EU's approach had become more pragmatic and geopolitically driven, emphasising raw materials, energy and transport. Democracy and serious human rights concerns were less prominent in public diplomacy with regional leaders. [Human rights groups](#) have therefore urged Brussels to prioritise human rights and civil society engagement in its regional approach, and have warned against downplaying the issues at hand in official summit diplomacy with the Central Asian states, all of which are classified as »not free« by Freedom House.

Societal engagement

This recent shift from a values-based agenda to a more pragmatic, interest-driven approach is already having tangible effects. The reduced visibility of democratisation-related conditionality goes hand in hand with a shrinking of civic space, growing constraints on freedom of expression and assembly, and mounting obstacles for independent journalists, civil society organisations and LGBTQ+ activists in the region. European embassies, once important supporters of local activists, are increasingly perceived as prioritising security, counter-terrorism and geopolitical stability. Combined with a broader rise in anti-Western sentiment and the frequent conflation of EU and US policies, this shift has weakened the EU's soft power. This sentiment is reinforced by geopolitical grievances linked to the wars in Iraq, Afghanistan and Syria, as well as the Palestinian issue. The EU's moral standing has particularly suffered because of what are widely perceived as double standards in its responses to Ukraine compared with Gaza.

Nevertheless, the EU still has considerable normative appeal in the region, particularly with regard to areas such as education, cultural exchange, labour standards and, perhaps its clearest asset, the broader concept of democratic, rules-based governance. European universities, scholarship programmes and value-driven cooperation frameworks continue to be of great interest and enjoy credibility in Central Asian societies, particularly among younger generations. Against the backdrop of a more assertive Russia, which is pushing heightened expectations of loyalty and pressure on its Central Asian partners, this soft power is especially valuable.

What the EU can do

→ speak up

The EU should speak out more consistently against authoritarian practices in Central Asia and stop turning a blind eye to repression as the alleged »price« of pragmatic cooperation. This could involve publicly addressing human rights violations, such as politically motivated prosecutions, discriminatory policies against minorities, the use of »extremism« or »foreign influence« narratives to silence critics, as well as widespread corruption. Such action would not only restore EU credibility, but also protect its long-term interests. A stronger rule of law and greater respect for basic freedoms would reduce corruption and arbitrariness, strengthen contract enforcement, and ultimately create a more predictable environment for investment in connectivity, energy and raw materials.

→ link economic investment to governance standards

The EU can further restore its credibility by linking economic investment to political, social and institutional reforms in order to ensure that economic growth does not follow authoritarian or illiberal pathways. Integrating local expertise, such as researchers, civil society and regional specialists, into EU decision-making and programming would improve effectiveness and legitimacy. Furthermore, the EU could expand targeted scientific cooperation and academic exchange programmes for Central Asia, modelled on existing EU research partnerships with other regions.

→ step into the void left by USAID

Taking a pragmatic yet principled approach, the EU can pursue economic initiatives in ways that avoid unnecessary geopolitical signalling. Democracy, the rule of law and human rights remain Europe's distinctive assets and core drivers of its soft power in Central Asia and don't need to be subordinated to short-term geopolitical considerations. The EU is a major development aid provider in the region and could gain additional influence by stepping into the space left by declining USAID funding, through greater engagement with independent NGOs, civil society organisations and democratic actors.

→ invest in skilled labour

To regain influence in this complex environment, the EU could adjust its approach to Central Asia while retaining the core values with which it is still associated there. One avenue concerns vocational training. Mindful of the Chinese Luban workshop initiative, the EU (or its Member States with a strong vocational training tradition, such as Germany) could promote its own vocational training centres, focusing on future technologies and supplying quality education in accordance with European curricula and relying on European technology and European standards. Such investments would pay off twofold. First, by countervailing

the drift of Central Asia towards the Chinese-centric technical and regulatory ecosystem, upholding EU standard-setting and ensuring future compatibility. Second, by allowing Central Asian states to move up the value chain, for example, by processing raw materials or investing in renewables. This is what EU Commission President von der Leyen already promised at the EU-Central Asia summit in Samarkand in April 2025.

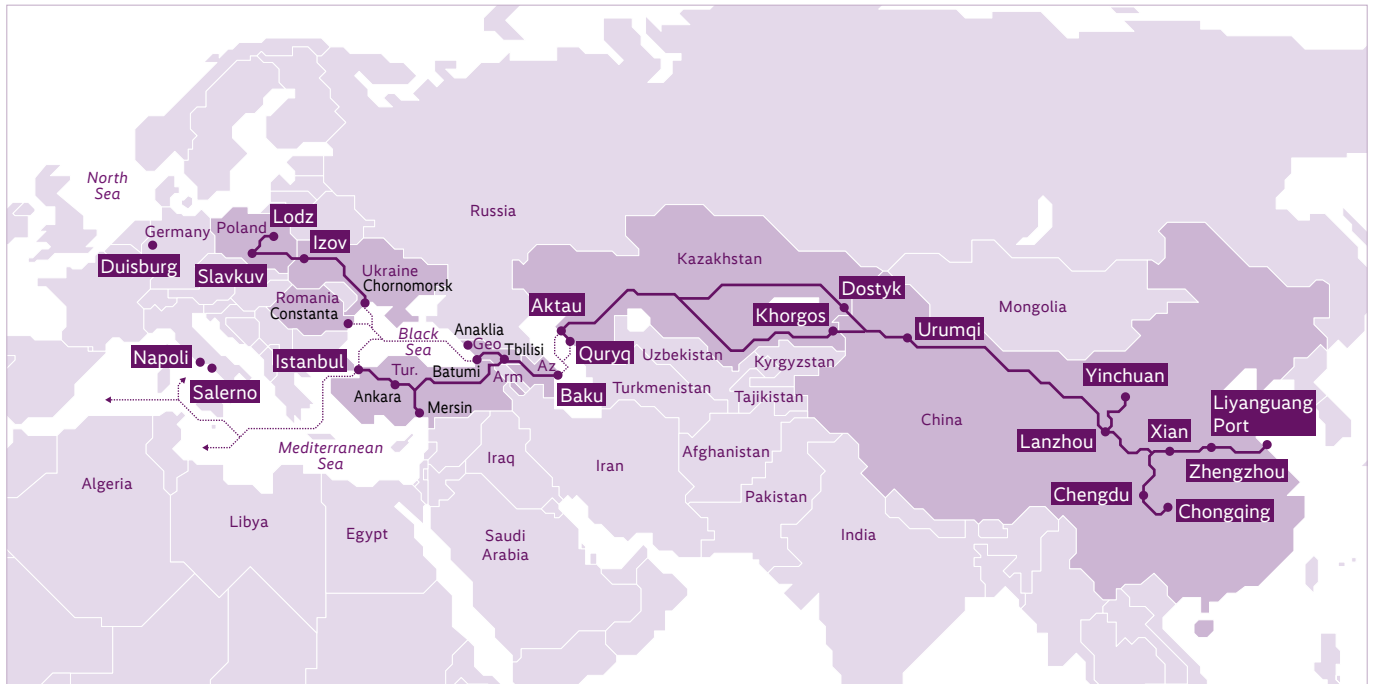
Another, connected avenue lies in the field of labour migration. Russia continues to exert leverage and has the capacity to weaponise labour mobility, which has a particular impact on Kyrgyzstan, Tajikistan and Uzbekistan. Against this backdrop, European labour mobility initiatives, such as Germany's training and recruitment of Uzbek health-care workers or UK recruitment of seasonal workers from Central Asia, tend to be perceived as less politicised and could act as a subtle counterweight to Russian influence in the future. They also help to address Europe's labour shortages, especially in mid-skilled sectors. Existing programmes sometimes involve pre-departure training in partnership with European companies and could likewise offer practical skills development aligned with European standards for local economies.

Economic engagement

One of the major economic priorities of Central Asian states is to move up the value chain and avoid dependencies on a single partner. EU–Central Asia trade remains dominated by the region's raw material exports, but Central Asian states are increasingly seeking European technology, know-how and industrial investment to move toward value-added production; they no longer wish to remain merely suppliers of natural resources. While EU standards are highly valued for quality and durability, EU procedures, especially those linked to sanctions compliance, are widely perceived as slow and cumbersome. This frustrates local businesses. Combined with a new regional confidence, the upshot of this is a more explicit »first come, first served« approach to resource access.

Another priority is economic connectivity. Central Asia is land-locked but finds itself strategically positioned between Europe and China. Its interest lies in developing trade corridors and promoting economic localisation along these routes, with a particular focus on advancing the Middle Corridor.

The Middle Corridor is a trans-Caspian route connecting China, Central Asia, the South Caucasus and Europe. It has been on China's agenda for a while within the framework of the Belt and Road Initiative and gained momentum when the EU sought alternative trade routes to bypass Russia after its invasion of Ukraine. The EU is investing in the corridor via its Global Gateway facility (Trans-Caspian Transport Corridor, involving around 10 billion euros). The corridor is already operational but has serious drawbacks because of logistics bottlenecks and capacity limitations. It



Map of the Middle Corridor

transports only a modest share of the overland trade between Europe and China, which makes up only 10% of overall mutual trade anyway. Kazakhstan is a key transit state: Chinese goods enter through the Khorgos dry port, China's biggest BRI investment in Central Asia. Kazakhstan has already intensified cooperation with Azerbaijan in support of the corridor. In autumn 2025, Azerbaijan even officially **became full member** of the consultative meetings of heads of state of the five Central Asian states.

Interlocutors in Central Asia increasingly highlight the potential for EU–China economic coordination in the region. Indeed, the EU and China work in parallel and finance complementary segments of the trade corridor. They do not work together explicitly, although there was some interest in this in the past. For example, a joint EU–China connectivity platform was established in 2015 but has not met expectations, as both sides have prioritised securing contracts for their own firms and promoting their respective standards and regulatory approaches. As a result, there currently appears to be little appetite for deeper cooperation.

What the EU can do

→ encourage local processing of raw materials

When partnering with Central Asian governments on raw material extraction, the EU should expand investment in local processing so that added value stays in Central Asia. This approach will benefit local economies and distinguish the EU from other actors. Investment in processing technologies should come under one (European) standard, so that countries that have different metals do not compete with, but complement each other.

→ use synergy with China

As the EU continues to redefine its position vis-à-vis a revisionist Russia, it should consider harnessing synergies with China in Central Asia. Competition with the EU has already encouraged Chinese actors to improve their projects' sustainability and transparency. This dynamic can work to the region's advantage if both sides capitalise on their respective strengths rather than duplicate efforts. However, time is short: several key industrial sectors in Central Asia, including automobile production, have already come under Chinese control. The EU should therefore focus on sectors offering higher technological sophistication in which European expertise and standards can make a distinctive contribution.

Cooperation with China on joint development projects in Central Asia could serve shared interests. Central Asian governments consistently emphasise that they would like the EU to regard its Trans-Caspian Transport Corridor and China's Belt and Road Initiative not as rival undertakings but as complementary projects. After all, it is China that generates most of the freight currently moving westward toward Europe, while containers returning east from Europe often travel empty, as European exports typically travel to China by sea. In this context, coordinated planning and investment could substantially increase efficiency along the Middle Corridor.

One practical model for cooperation could involve a clear division of roles: China would provide and finance the infrastructure, while Europe would contribute operational know-how, management experience and compliance with European technical standards. It is not clear whether such an arrangement would be welcomed by either side. Per-

haps multilateral co-financing could offer a way, for example, through cooperation between the European Investment Bank (EIB) and the Asian Infrastructure Investment Bank (AIIB). The EIB–AIIB co-financed [Bangalore Metro Rail](#) project in India offers an example. In any case, a cooperative approach could be in the EU's interest: it would not only embed higher quality requirements and interoperability along the corridor but also help prevent the displacement of European technical norms. A collaborative approach between the EU and China, facilitated by Central Asian partners, would make investments compatible and accelerate Middle Corridor's transformation into a competitive and sustainable transport route linking the two ends of the continent.

Environmental engagement

The EU's environmental strategies for Central Asia are often considered outdated and not sufficiently attuned to local circumstances. For example, the ambitions outlined in the strategic partnership on green hydrogen with Kazakhstan demonstrate a lack of understanding of regional ecological constraints, such as the degradation of the Caspian Sea. However, cooperation on water is widely appreciated, as water is considered the most politicised and securitised environmental issue in Central Asia.

The problem is becoming increasingly urgent because of climate change, melting glaciers and the resulting decrease in water availability. Growing populations in Central Asia are adding to the strain. The Soviet-era water–energy exchange between the upstream countries (Kyrgyzstan and Tajikistan) and the downstream countries (Kazakhstan, Uzbekistan and Turkmenistan) began to break down after independence, as the downstream countries increasingly sold their gas and coal resources in the market, having previously used them to provide the upstream countries with free electricity generation in exchange for free water – which they nevertheless expected to continue. This has created mistrust, disrupted seasonal coordination and accelerated the securitisation of water as a political bargaining tool and source of national vulnerability.

Structural and governance challenges also hinder effective water management. Although local multi-stakeholder bodies exist, they have limited authority, insufficient funding and weak political support. This reinforces the gap between local observation and central decision-making. For example, early warning signs of flooding are often detected locally but action is not permitted without central approval. The situation is even more sensitive in border areas, where water remains a source of tension and informal cross-border cooperation lacks institutional support.

Evidence-based policymaking and regional cooperation on shared water resources are held back by fragmented hydro-meteorological systems, outdated monitoring infrastructure, non-standardised data and growing restrictions on publishing or sharing scientific research, especially in Ky-

rgyzstan. At the same time, ageing Soviet-era irrigation networks, high evaporation, unreliable measurements and inefficient agricultural practices cause major water losses and increase pressure on already scarce resources.

Regional cooperation is also limited by competing national priorities, which have shifted the focus from multilateral coordination to bilateral bargaining. The International Fund for Saving the Aral Sea, the main framework for managing Central Asia's transboundary water resources since 1993, has struggled to balance the interests of upstream hydro-power producers and downstream agricultural users. Kyrgyzstan's suspension of participation since 2016 has further reduced its effectiveness. Perceived inequalities in diplomatic influence add to these negotiation dynamics and push states to favour bilateral deals over regional solutions.

What the EU can do

→ expand technical cooperation

Against this backdrop, the EU is already present in this sensitive area, for example through the Team Europe Initiative on EU–Central Asia Cooperation on Water, Energy, Climate and Digitalisation, which aims to strengthen regional cooperation and governance structures while supporting a more integrated green and energy transition. Building on its reputation as a politically neutral, high-quality technical actor, the EU is well placed to deepen its engagement in risk reduction and early-warning systems by supporting knowledge exchange, advanced data processing and analysis, modelling and scenario-building, as well as capacity-building for professionals in meteorological and environmental agencies.

→ strengthen cross-border water collaboration

The EU can encourage practical cross-border cooperation by supporting river basin councils and community groups on both sides of shared water bodies in developing bottom-up approaches to water management. Locally rooted pilot projects with the potential for wider application can help to build trust and shared problem-solving. Further strengthening technical cooperation can be achieved through joint monitoring, compatible data standards and collaboration with universities, research institutes and relevant civil society organisations. As these efforts tend to be less politicised and more evidence-based, they offer a constructive space for EU engagement, including through independent scientific platforms and regional knowledge hubs.

Kazakhstan



Domestic politics and social dynamics

Kazakhstan's society traditionally comprised an urban, predominantly Russian-speaking segment and a mainly Kazakh-speaking population with stronger rural roots. In the early years of independence, the government sought to maintain a balance between these groups. Over recent decades, however, demographic change, including the sharp decline in the ethnic Russian population, has strengthened the role of the Kazakh language and Kazakh national symbols in public life. As a result, earlier social divides have become less clear-cut, and demands for a more explicitly »Kazakh« national identity have grown.

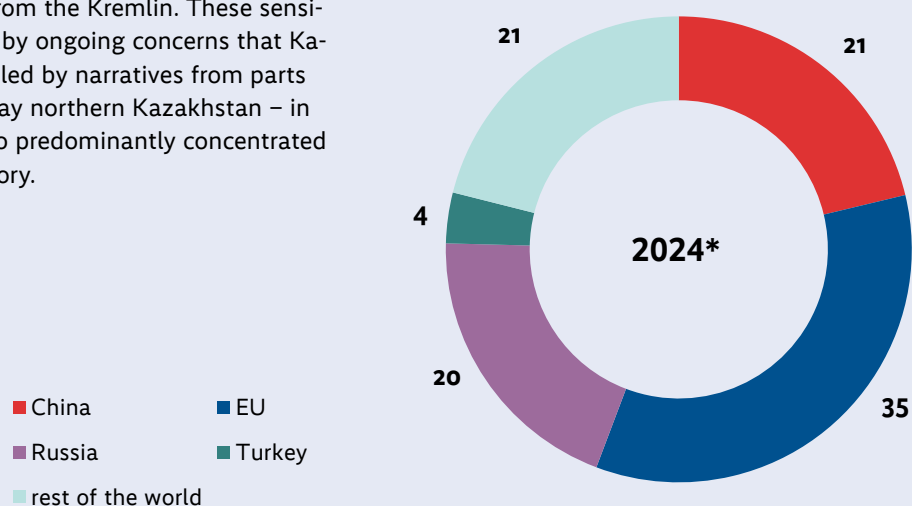
These shifts have made underlying ethnic fault-lines more visible and intensified [debates over national identity](#), including a re-evaluation of national history. Concerned that such tensions could increase societal vulnerability and create openings for external influence, particularly from Russia, the regime has increasingly securitised identity discourse, especially after the civil unrest in January 2022 and Russia's invasion of Ukraine the following month. Responding to the widespread societal expectations for a "Kazakh" nation, the government seeks to avoid signalling any retreat from Russia's cultural influence in order to prevent alienating ethnic Russian communities in Kazakhstan and provoking a hostile reaction from the Kremlin. These sensitivities have been heightened by ongoing concerns that Kazakhstan could be »next«, fuelled by narratives from parts of the Russian elite who portray northern Kazakhstan – in which ethnic Russians are also predominantly concentrated – as historically Russian territory.

Foreign policy and trade relations

Kazakhstan has criticised the manner in which the EU and the United States impose sanctions against Russia, arguing that they fail to consider the position of countries with extensive economic and geographic ties to Russia. At the same time, Kazakhstan is trying to demonstrate that it is not violating the sanctions, for example by collaborating with US financial-crime agencies. Despite its formal ties with Moscow, Kazakhstan resists being drawn into Russia's geopolitical agenda and aims to position itself as a neutral actor preserving strategic balance.

The European Union remains Kazakhstan's largest trading partner by total turnover and export destination, a position unique in Central Asia and driven primarily by energy exports. Despite China's growing economic presence, long-standing Sinophobia persists in Kazakhstani society, fuelled by concerns over transparency and local ownership in Chinese-backed projects, but also by public concern over the detentions and restrictions affecting ethnic Kazakhs in China's Xinjiang region.

Kazakhstan's trade turnover by partner in %



* total trade in goods

Source: own calculation based on trade map data

Kyrgyzstan



Domestic politics and social dynamics

Kyrgyzstan was long considered the most democratic country in Central Asia, with a vibrant civil society and a higher degree of press freedom. This has gradually been changing since 2020, however, when disputed elections sparked mass protests, after which the vote was annulled, the president resigned and Sadyr Japarov quickly rose to become one of the most important figures during the political crisis in Kyrgyzstan. As prime minister and then acting president, he used the weakened, extended-mandate parliament to push electoral changes and fast-track constitutional reform. These changes paved the way for an authoritarian presidential system and ultimately sidelined the reform hopes that had fuelled the 2020 uprising. Since then, judicial proceedings and extra-legal coercion have been employed to curb the opposition and civil society critics.

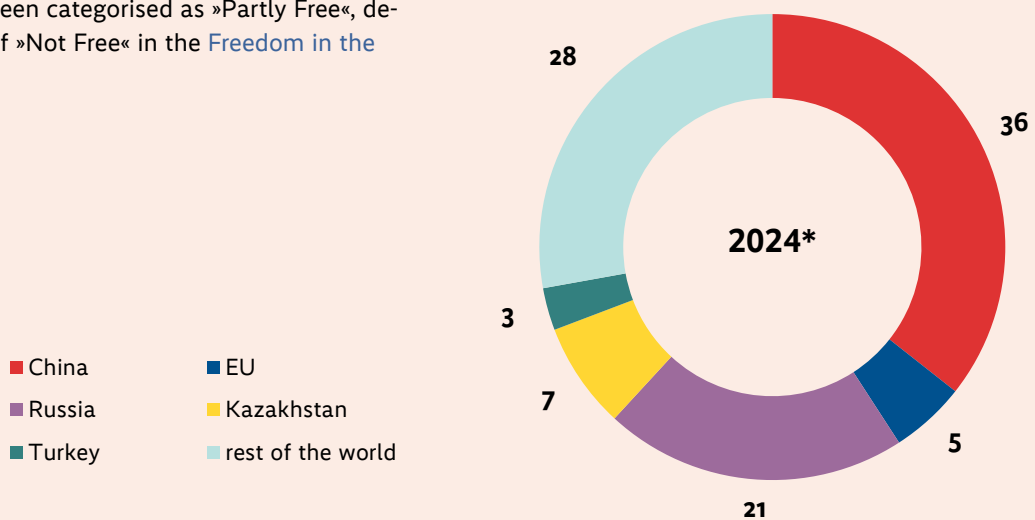
In 2024, Kyrgyzstan introduced the Foreign Representatives Law, requiring organisations with foreign funding to register and undergo audits. Independent media also came under pressure when in June 2025 the Kyrgyz parliament passed a new media law requiring all media outlets to register with the state and imposing new restrictions on foreign ownership of media outlets. Together, these measures have substantially eroded the operating space for civil society. Between 2020 and 2025, Kyrgyzstan, the only Central Asian state to have been categorised as »Partly Free«, declined to the status of »Not Free« in the [Freedom in the World index](#).

Foreign policy and trade relations

Since 2022, Kyrgyzstan has become an important transit point for re-exporting goods to Russia, in violation of Western sanctions. The country remains heavily reliant on Russia for fuel and food imports, security cooperation and military training.

China has now become Kyrgyzstan's strongest trading partner, followed by Russia. China is playing a leading role in key sectors such as mining, road construction, machine building and renewable energy. The construction of the China-Kyrgyzstan-Uzbekistan railway, a key part of China's Belt and Road Initiative, began in December 2024, following nearly three decades of delay caused by financial and technical constraints, political instability in Kyrgyzstan, and resistance from Kazakhstan and Russia, which benefit economically from the existing northern transit corridor via Russia. In Bishkek, the railway is seen as a crucial opportunity to strengthen Kyrgyzstan's position in regional trade. The significant presence of Chinese companies has fuelled perceptions in Kyrgyzstan that China is the principal driver behind new infrastructure development, which has boosted China's soft power.

Kyrgyzstan's trade turnover by partner in %



* total trade in goods

Source: own calculation based on trade map data

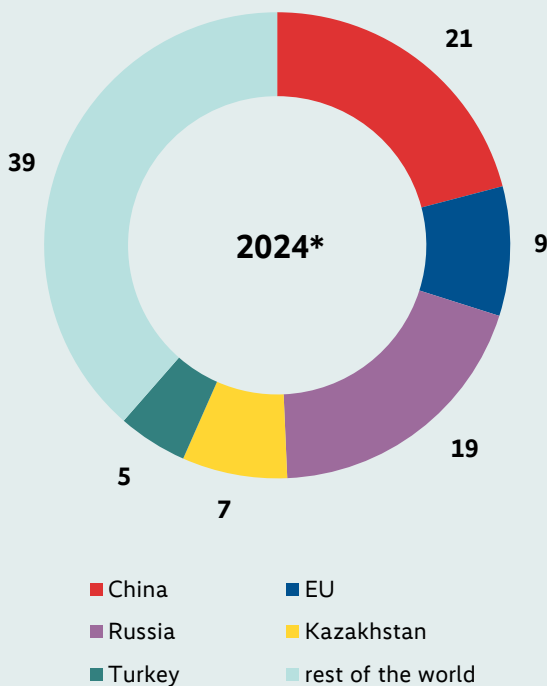
Uzbekistan



Domestic politics and social dynamics

Since President Shavkat Mirziyoyev took office in 2016, Uzbekistan has become more open following decades of isolation under the repressive rule of Islam Karimov. Journalists, bloggers and online debates have become more visible, but many observers still describe these relaxations as »image reforms«, as Uzbekistan remains an unfree state with clear red lines for civil society. As the EU's second Central Asian GSP+ beneficiary after Kyrgyzstan, Uzbekistan enjoys duty-free access to the EU market in exchange for implementing 27 core international conventions, including the International Covenant on Civil and Political Rights. The EU monitors compliance with these conventions through regular dialogue and monitoring missions.

Uzbekistan's trade turnover by partner in %



* total trade in goods

Source: own calculation based on trade map data

Foreign policy and trade relations

Uzbekistan's economy continues to grow at a strong pace, and the government is actively reforming legislation to bring it into line with WTO requirements. Nevertheless, the economy remains heavily state-directed, and economic growth has often come at the expense of human rights. Economically, Uzbekistan is catching up with Kazakhstan, drawing on its central location, large population and rising foreign investment.

China has become Uzbekistan's most important trading partner, closely followed by Russia, from which Uzbekistan imports natural gas and exports uranium, gold and textiles from its extensive cotton industry, a legacy of the Soviet era. Although several Chinese initiatives have faltered due to Uzbekistan's insistence on greater localisation, Beijing is adapting by offering higher levels of local ownership. This is increasingly visible in industrial partnerships and joint ventures, particularly in the automotive sector, where Chinese firms are investing in local production in Uzbekistan. Thus, China is increasingly being viewed as a consistent, non-politicising counterweight to Russia. At the same time, Uzbekistan stands out among the three countries examined here for having a comparatively diversified set of trading partners, with significant trade shares also involving Kazakhstan, Turkey and South Korea.

However, Uzbekistan still struggles to generate enough jobs, making labour migration central to its external relations. Although it is diversifying its destinations by signing agreements with countries such as Germany, Slovakia and Latvia, the majority of Uzbek migrants still work in Russia, a country that also heavily depends on Uzbek labour. Many Uzbek experts argue that Uzbekistan does not leverage this interdependence sufficiently in negotiations with Moscow. This could be important, given that Uzbekistan depends on Russian compensation for fuel shortages despite being one of the world's major exporters of natural gas, a situation that often leads to domestic power cuts.

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