

Central Asia emerging from the shadows

European Union – Central Asia relations in evolving Eurasian geopolitics

Niels Drost
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Clingendael Report



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Executive summary

Since the Russian full-scale invasion of Ukraine in 2022, there has been a strong increased interest in the five Central Asian republics: Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan. But contrary to the ‘new Great Game’ narratives that present the region as just a battlefield for larger powers, Central Asian states are demonstrating that they are taking the initiative in diversifying their international relations with their own agendas.

All this takes place in a rapidly evolving geopolitical context, which this report outlines through six dynamics in an interactive mapping:

1. **Slumbering conflicts over water, land, and borders.** Since the dissolution of the Soviet Union in 1991, conflicts in Central Asia have simmered in the background and escalated once in a while, yet the situation has vastly improved over the previous years.
2. **The water-energy-food nexus.** There is tension between water, energy, and food security in Central Asia. While the region is rich in water and energy resources in general, both are scarce at national levels as they are unequally distributed.
3. **Russia as a systemic factor.** The Russian influence in the region appears to be weakening but is still very present, and Russia can be considered to be a systemic factor in the region.
4. **China’s consolidated position.** China has made a remarkable rise over the past two decades and has consolidated its position as one of the most important partners for Central Asia – particularly in economic terms, but increasingly in security, too.
5. **Re-establishment of relations with Afghanistan.** Since the US left Afghanistan, Central Asia has strengthened its ties with the Taliban. This is in the interest of the republics – either for stability or practical concerns such as water flows and security.
6. **Other interested actors.** Many other parties are interested in working with Central Asia as well: Türkiye and Azerbaijan through connectivity and the Turkic world, Iran due to its strategic location and ethnic and linguistic ties to Tajikistan, and the Arab Gulf states are investing in the energy sector.

Amid this quickly evolving geopolitical context of Eurasia, the EU can also play a role. As Central Asian states value European engagement, both should use the momentum of increased attention for the region to further strengthen the relationship.

The EU has argued it wants to take a more geopolitical approach in its dealings worldwide since 2019. If the EU wishes to succeed, this policy should be backed up by tangible engagement that goes beyond energy and trade, for instance by including education, regional cooperation, and other elements in its policy as well. This report identifies eight of such areas for the EU, in line with the EU strategy for Central Asia. While all points are important, the ones related to water management and agriculture should be of particular relevance to the Netherlands in “doing its bit”.

First, Europe has a strategic interest in supporting Central Asia in the energy sector to develop further alternatives to Russian oil and gas, diversify imports of **green energy and Critical Raw Materials (CRM)**, and to mitigate the impact of climate change. Second, another key issue directly linked to this is **water** availability, accelerated by the impact of climate change and growing populations. Among the EU Member States, the Netherlands is a recognized world leader in water management and is interested in sharing its experience with the region.

Third, **agriculture** is a key sector in which the EU and Central Asia could strengthen cooperation. The EU has an interest in facilitating agricultural trade and contributing to Central Asian countries’ export diversification and sustainable growth. It is also perceived as a reliable actor with technical expertise and technology. Historically, agriculture has been one of the most important sectors for the relationship between the Netherlands and Central Asian countries.

Fourth, the region has recently regained its relevance for global trade routes and found itself in the spotlight. Since the Russian full-scale invasion of Ukraine, in fact, there is growing attention to the Trans-Caspian International Transport Route (TITR) – or the **Middle Corridor** – as an alternative trade route linking China to the EU via Kazakhstan, Azerbaijan, Georgia, and Türkiye. Although there are risks, such as increased Chinese influence over the region and leverage over the EU from countries on the TITR route, the benefits of intensifying EU connections with Central Asia outweigh the risks.

Fifth, **education** is an area in which all five Central Asian partners are interested in cooperating more closely with the EU. Increased cooperation in this area would bring positive results for all other mentioned key sectors for cooperation, and opens possibilities for the EU to play a bigger role. Sixth, terrorism, drug trafficking, extremism, radicalisation, and illegal migration all form **internal security risks** for Central Asia and the EU. Contributing to regional security is a long-standing EU priority and could offer an opportunity for dialogue between the EU and Central Asia.

Seventh, the EU has traditionally been a partner for **strengthening human rights, democracy, and the rule of law in Central Asia**. Yet, this no longer seems to be a top priority in Brussels as the focus is on energy and trade, and the EU engages with the region through a balancing act of ‘principled pragmatism’. Eighth, Central Asian countries face many challenges that are regional in nature, but are not ready to face them as a region. With its vast experience in bringing together countries with different cultures and histories, the EU is a natural partner to support **regional cooperation** efforts in Central Asia.

Towards further strengthening EU – Central Asia relations in line with the EU’s geopolitical ambitions, we put forward the following recommendations:

Improve the positive presence of the European Union in Central Asia

- Showcase the long-term commitment of the EU to Central Asia by deepening the bilateral relationship in the above-mentioned areas;
- Prioritize the EU-Central Asia Summit;
- EU member states like the Netherlands should also have an embassy in other countries of the region besides Kazakhstan, first and foremost in Uzbekistan;
- Central Asian countries should also strengthen their presence and visibility in the EU, although this is rather a recommendation for the Central Asian governments.

Focus on concrete projects that offer opportunities in a wide range of sectors

- Considering the geopolitics of the region, the EU does not need to compete with Russia or China in Central Asia as this will be a losing battle anyway. Rather, the EU should act more geopolitical by increasing its cooperation with Central Asia through concrete projects in a wide range of sectors.

- The Commission and the EU Delegation to Kazakhstan could facilitate a Team Europe Initiative on green hydrogen with Kazakhstan, as suggested in earlier Clingendael work;¹
- The Netherlands should consider collaborating more in the Team Europe Initiative on Water, Energy and Climate Change;
- The Netherlands should consider extending the Matra Grant Policy Framework to its embassy in Astana, for all five countries of Central Asia;
- When further deepening the EU-Central Asia relationship, the EU should consider connecting this to doing more projects in the area of human rights, democracy, good governance, and the rule of law.

Take stock of further opportunities

- In setting out a long-term vision for cooperation with Central Asia, projects with the youth are a best practice;
- The EU should further stimulate exchanges between EU and Central Asian universities;
- It would also be worthwhile for the EU to stimulate educational exchanges within Central Asia, so that Central Asian students meet in their own region as well, instead of in Moscow or Beijing;
- The EU should consider investing in strengthening primary and secondary education as well.

1 Giulia Cretti and Louise van Schaik, [‘Resource Curse or Darling’](#), Clingendael, 13 March 2024.

List of Acronyms

ADB	Asian Development Bank
ASEAN	Association of Southeast Asian Nations
AU	African Union
BOMCA	Border Management Programme in Central Asia
BRI	Belt and Road Initiative
CADAP	Central Asia Drug - Action Programme
CAPS	Central Asian Power System
CAWEP	Central Asia Water and Energy Program
CIS	Commonwealth of Independent States
CKU	China-Kyrgyzstan-Uzbekistan railway
CPC	Caspian Pipeline Consortium
CRM	Critical raw materials
CSTO	Collective Security Treaty Organisation
EAEU	Eurasian Economic Union
EBRD	European Bank for Reconstruction and Development
EIB	European Investment
EISA	Environmental and Social Impact Assessment
EPCA	Enhanced Partnership and Cooperation Agreements
EU	European Union
FSB	Federal Security Service of the Russian Federation
GDP	Gross domestic product
GSI	Global Security Initiative
GSP	Generalised Scheme of Preferences
IDB	Islamic Development Bank
IFAS	International Fund for Saving the Aral Sea
LEICA	Law Enforcement in Central Asia
NAFTA	North American Free Trade Agreement

OSCE	Organization for Security and Co-operation in Europe
OTS	Organization of Turkic States
PCA	Partnership and Cooperation Agreements
RES	Renewable energy sources
SCO	Shanghai Cooperation Organisation
SECCA	Sustainable Energy Connectivity in Central Asia
STRIVE	Strengthening Resilience to Violent Extremism
TAPI	Turkmenistan-Afghanistan-Pakistan-India pipeline
TITR	Trans-Caspian International Transport Route
UK	United Kingdom
UN	United Nations
UNGA	United Nations General Assembly
US	United States
USD	United States Dollar

1 Introduction

It has been a busy year for the five Central Asian republics: Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan. Over the past few months, many high-level foreign visitors have travelled to one or multiple countries in the region. From Vladimir Putin to Xi Jinping, Josep Borrell, David Cameron, Olaf Scholz, Mark Rutte, and others – all aim to strengthen their ties with the region.²

Central Asia is more and more in the spotlight. After the Russian full-scale invasion of Ukraine in 2022, there has been an increased interest in the region – especially from the West.

This situation is often portrayed with the cliché of a ‘new Great Game’, drawing a parallel with the 19th century when the British and Russian Empires fought over influence in the region. Especially in some publications during the last decade, Central Asia is described as “a major battlefield [in] the geopolitical games of the world’s greatest powers”,³ as “an arena of great power rivalry [where] the new Great Game has started”,⁴ or a location where “a multi-state competition for influence and even control of these new states” has arisen.⁵ Many other publications have reported on the region through the lens of the former Soviet Union, or as “Russia’s backyard” where the gardener is currently not at home.⁶

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- 2 Associated Press, [‘Putin Arrives in Uzbekistan on 3rd Foreign Trip of His New Term’](#), *Voice of America*, 26 May 2024; Temur Umarov, [‘What Does Xi Jinping Want From Central Asia?’](#), Carnegie Endowment for International Peace, 5 July 2024; Assel Satubaldina, [‘We Want to Maintain Positive Momentum in Partnership, Says Top EU Diplomat in Kazakhstan’](#), *The Astana Times*, 1 August 2024; Chris Rickleton, [‘David Cameron’s Very Central Asian Week: More Than Just A Jaunt?’](#), *Radio Free Europe/Radio Liberty*, 26 April 2024; [‘Germany’s Scholz Heads to Central Asia in Bid to Expand Ties’](#), DW, 15 September 2024; Dana Omirgazy, [‘Kazakhstan, Netherlands Explore Prospects for Strengthening Ties’](#), *The Astana Times*, 28 May 2024.
 - 3 David Pipinashvili, [‘Sino-Russian Geopolitical Interests in Central Asia and South Caucasus’](#), *Bulletin of the Georgian National Academy of Sciences*, vol. 5, no. 2 (2011).
 - 4 Petar Kurečić, [‘The New Great Game: Rivalry of Geostategies and Geoeconomies in Central Asia’](#), *Hrvatski Geografski Glasnik/Croatian Geographical Bulletin* 72, no. 01 (2010): 21–46.
 - 5 Stephen Blank, [‘Energy, Economics and Security in Central Asia: Russia and Its Rivals’](#), *Central Asian Survey* 14, no. 3 (1995): 373–406.
 - 6 Maximilian Hess, [‘Russia Is Down, But Not Out, in Central Asia’](#), Foreign Policy Research Institute, 17 February 2023.

However, this strong focus presents a distorted view and the Great Game parallel does not really apply to the current situation. Whereas the empires of the 19th century fought over physical territory and conquered this from local rulers, the current courtiers rather jostle for influence over the sovereign states of Central Asia – amid the complex geopolitical dynamics of the region.⁷

In the current competition over influence in Central Asia, rather than being passive pawns in a new Great Game, the states of the region are rather emerging out of the shadows. They show actively and confidently that they are actors with agency who know how to balance their interests, and use their relations with larger powers to their own advantage. As Murtazashvili and Umarov recently argued: Central Asia is “nobody’s backyard”.⁸

In line with this, EU documents argue that the full-scale Russian invasion of Ukraine in 2022 and the following “geopolitical situation”, in combination with the security threats as a consequence of the US withdrawal from Afghanistan in 2021, offer “opportunities for the Central Asian countries to emerge as regional political actors in their own right”.⁹ For many of these countries this would also suggest a delicate balancing act between primarily Russia and China and a desire to involve other third countries and actors in the region as well, including Iran, Türkiye and the US.

The EU is another actor that is attempting to increase its influence in Central Asia, after it has gradually stepped up its engagement with the region since the first EU strategy for Central Asia in 2007. This report explores how the European Union can do so, answering the following research questions:

1. What is the nature of the international relations between the countries of Central Asia, as well as their relations with major global and regional powers?
2. What influence and interests do the EU and the Netherlands in particular have regarding local actors, vis-à-vis other players in the region?

7 Alexander Cooley, [‘The New Great Power Contest in Central Asia’](#), in *Great Games, Local Rules: The New Great Power Contest in Central Asia* (Oxford University Press, 2012): 3-15.

8 Jennifer B. Murtazashvili and Temur Umarov, [‘Nobody’s Backyard: A Confident Central Asia’](#), Carnegie Endowment for International Peace, 5 September 2024.

9 Rosamund Shreeves, Angelos Delivorias, and Anna Caprile, [‘The EU Strategy on Central Asia: Towards a New Momentum?’](#), European Parliamentary Research Service, April 2024.

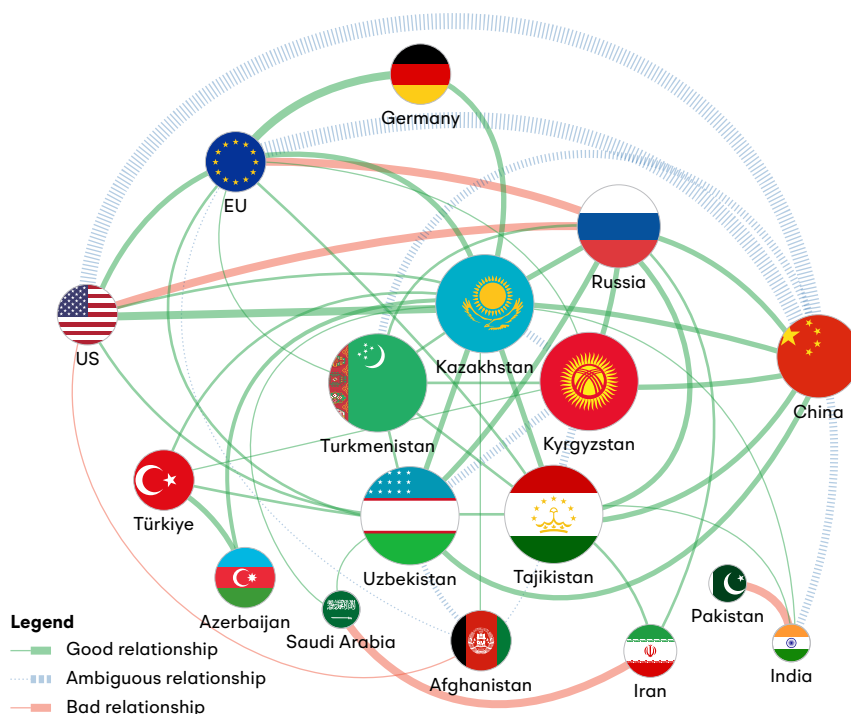
3. How can the EU and the Netherlands in particular effectively enhance their relations with the countries of Central Asia in a mutually beneficial way?

The methodology applied to this report is based on a combination of literature desk research and interviews in Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan in April and May 2024. The authors are grateful for the insights that the various policy makers, diplomats, journalists, entrepreneurs, civil society representatives and others have shared with them.¹⁰

10 The authors would also like to thank Jos Boonstra, Raoul Bunskoek, Bob Deen, Louise van Schaik, and Tony van der Togt for their insightful feedback on earlier versions of this report, and Fenna de Vos for her valuable contributions.

2 The geopolitics of Central Asia

Figure 1 Overview of the geopolitical actors and relations in Central Asia, which is available as interactive mapping in the online version of this report



Over the past few years, Central Asia has witnessed a positive trend toward greater collaboration. The political climate in the region has become less tense and much more cooperative compared to the Central Asian republics' first 25 years of independence after the dissolution of the Soviet Union in 1991.

This is visible in the interactive online mapping of geopolitical actors and relations in Central Asia in Figure 1, which is largely made up of green lines representing positive relationships. This trend kicked off in 2016 when Uzbekistan began to open up under the new leadership of Shavkat Mirziyoyev, who cut ties with the isolationist policy of his predecessor Islam Karimov. Uzbekistan borders all four other Central Asian republics and Mirziyoyev aims to improve relations with these neighbours.

In this process, personal relations among leaders are a driving force that directly translates into the intergovernmental relations in the region.

Taking some exceptions into account, such as escalating tensions between Kyrgyzstan and Tajikistan over the past few years (which will be described later in this chapter), state-to-state relations have vastly improved compared to ten years ago, in line with the personal relations of the leaders of Central Asia.

This becomes evident with the increase in consultative meetings between Central Asian heads of state and other representatives of government. Since 2017, these annual meetings in different Central Asian countries have functioned as pivotal platforms for regional cooperation.¹¹ While the substance of the meetings does not always translate into concrete action, the fact that countries meet – even without external partners such as Russia, China, or the EU – to discuss a common vision for the region is an exceptionally positive development. In fact, before 2016, there was limited dialogue among the countries and regional cooperation was more difficult; the Central Asian countries are all more confident now.

Especially since Russia's full-scale invasion of Ukraine in 2022, Central Asia has increasingly grown as a region. This appetite for closer relations/interactions is fuelled by the realisation that Central Asia will stand much stronger together, which is coupled with a wish to reduce dependency on foreign actors, first and foremost Russia and China, while continuing to cooperate with them as most important partners. This is an indispensable element to prevent being “mere pawns in the strategic manoeuvres of great powers”.¹² On top of this, many of the challenges faced by Central Asian countries are regional in nature, such as in the areas of water, energy, climate change, and security (which will be discussed later in the following chapters).

Kazakhstan and Uzbekistan, for example, place Central Asia at the core of their foreign policy priorities.¹³ The countries of the region share an order based on “sovereignty, diplomacy, international law, authoritarianism, and great

11 Meray Ozat, '[Central Asia Consultative Meeting: Strengthening Regional Ties and Expanding Horizons](#)', Caspian Policy Center, 18 September 2023.

12 Murtazashvili and Umarov, 'Nobody's Backyard: A Confident Central Asia'.

13 Svante E. Cornell and S. Frederick Starr, '[A Steady Hand: The EU 2019 Strategy and Policy toward Central Asia](#)', Institute for Security and Development Policy, November 2019.

power management” that binds them together,¹⁴ as well as bonds based on shared culture, history and religion.¹⁵ In terms of physical connections as well, Central Asia has gradually been shaped through roads, railroads, electricity grids, waterways, and other infrastructure – starting from the ancient Silk Road towards the Soviet Union. Although these connections have been partially demolished after the collapse of the Soviet Union, this enabled people from different parts of the region to come into contact with one another: a “hidden integration”.¹⁶ Central Asia can in fact be seen as – and considers itself to be – a distinct region.

Despite the underlying characteristics that define the Central Asian region, a strong common regional identity remains absent – an issue that has attracted renewed attention.¹⁷ And Central Asia is not a homogenous region, including Turkic-speaking peoples (in Kazakhstan, Kyrgyzstan, Uzbekistan, and Turkmenistan) and Persian-speaking populations (in Tajikistan). The countries also have different histories of nomadic and sedentary cultures, and there are major internal divisions between cities and rural areas.

Despite further regional cooperation and a renewed realisation of the necessity to do so, Central Asia is not heading towards EU-style integration. Such steps have been considered in the past, for example through the establishment of the Central Asian Union in 1994 that all countries except for Turkmenistan joined. However, this initiative did not succeed due to the conflicting interests of (candidate) members, internal disputes, and the rise of other multilateral initiatives initiated by the larger neighbours of Central Asia, such as the Shanghai Cooperation Organisation (SCO) and the Eurasian Economic Union (EAEU).¹⁸

Since then, serious steps towards institutional regionalisation have not been taken for various reasons. One of them was that the economic interests of individual countries, particularly Kazakhstan, outweighed the benefits of cooperation

14 Filippo Costa Buranelli, ‘[Central Asian Regionalism or Central Asian Order? Some Reflections](#)’, *Central Asian Affairs* 8, no. 1 (2021): 15.

15 Ibid., 22.

16 Per Högselius, ‘[The Hidden Integration of Central Asia: The Making of a Region through Technical Infrastructures](#)’, *Central Asian Survey* 41, no. 2 (2022): 224.

17 Erkin Baydarov, ‘[Barriers and Bridges for the Formation of Regional Identity in Central Asia](#)’, *CABAR. asia*, 16 January 2023.

18 Nurzhan Zhambekov, ‘[Central Asian Union and the Obstacles to Integration in Central Asia](#)’, *CACI Analyst*, 7 January 2015.

within Central Asia. It proved much more lucrative to become part of initiatives led by external actors, such as the EAEU, the SCO, or the Chinese Belt and Road Initiative (BRI), rather than to create a truly Central Asian organisation.¹⁹

As a result, Central Asia does not have an equivalent to organisations such as the Association of Southeast Asian Nations (ASEAN), the African Union (AU), or the North American Free Trade Agreement (NAFTA), with the exception of regional institutions with a specific goal in mind, such as the International Fund for Saving the Aral Sea (IFAS).

Bringing Central Asia together

During past years, there have been significant initiatives aimed at bringing together the five countries plus an international partner – the so-called C5+1 platforms. Japan was the first to engage with the region through this platform in 2004²⁰ and was followed by 11 more countries, including the US,²¹ the EU, Germany, Russia, and China, among others. In 2024, the US launched the B5+1 forum for the first time.²² This is the business counterpart of the C5+1, aimed at accelerating Central Asia's economic integration. These platforms are key to spur dialogue and cooperation with, and among, Central Asian countries and to facilitate regional solutions for common challenges.

Although Turkmenistan participates in the C5+1 formats and consultative meetings between the heads of state, it adheres to a strict policy of neutrality. Turkmenistan has declared itself to be “permanently neutral”, which was formally adopted as a declaration in the United Nations General Assembly (UNGA).²³ Hence, Turkmenistan has distanced itself from multilateral organisations such as the SCO and the Collective Security Treaty Organisation (CSTO) and prioritizes bilateral links over regional ones.⁷

19 Sebastian Krapohl and Alexandra Vasileva-Dienes, [‘The Region That Isn’t: China, Russia and the Failure of Regional Integration in Central Asia’](#), *Asia Europe Journal* 18, (2020): 347–66.

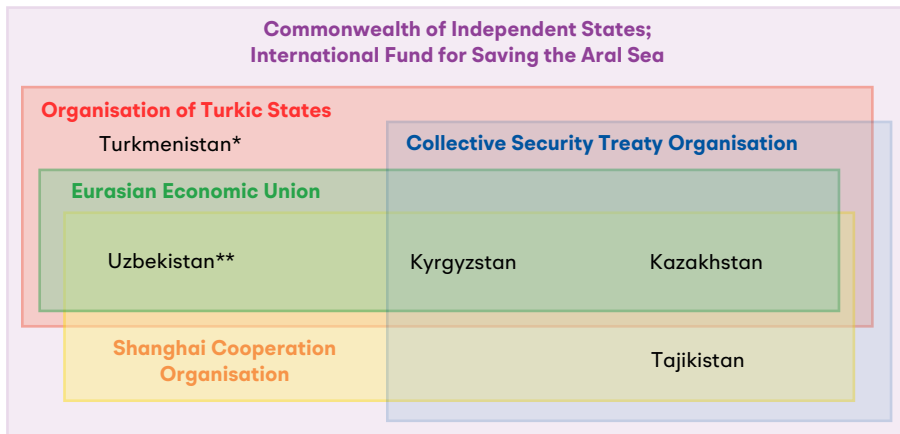
20 Alberto Frigerio, [‘Central Asia Plus Japan Summit Aims to Pioneer Sustainability, Connectivity, and Human Development’](#), *The Diplomat*, 8 August 2024.

21 [‘C5+1 Diplomatic Platform’](#), U.S. Department of State, 27 February 2023.

22 [‘B5+1 Forum: Advancing Business Partnership for Regional Prosperity’](#), B5+1, 2024.

23 UN General Assembly (50th Session: 1995-1996), [‘Maintenance of International Security: Resolutions: Adopted by the General Assembly’](#), 11 January 1996.

Figure 2 An Euler diagram illustrating the Central Asian memberships of international organisations



*: Associated member Commonwealth of Independent States (CIS), observer status Organisation of Turkic States (OTS)

** : Observer status Eurasian Economic Union

Most Central Asian countries aim to pursue a so-called multi-vector foreign policy, in which the republics are open to working with as many partners as possible. This idea is well illustrated by Kazakhstan’s President Kassym-Jomart Tokayev, who has said that his country wishes to have a “Great Gain for all in the Heart of Eurasia” instead of a Great Game, and to deepen relations with all neighbours and other countries interested in doing so.²⁴

This policy of working with as many partners as possible is not necessarily new and follows logically from the geographical location of Central Asia, with both Russia and China as larger neighbours,²⁵ and the history of the Silk Road. Since the war in Ukraine escalated in 2022, however, this policy has received a new impulse for Central Asia.

24 Kassym-Jomart Tokayev, ‘[Speech by the President of the Republic of Kazakhstan Kassym-Jomart Tokayev at a Meeting with the Heads of Foreign Diplomatic Missions Accredited in Kazakhstan](#)’, Official website of the President of the Republic of Kazakhstan, 4 November 2022.

25 Fabienne Bossuyt, ‘[Central Asia](#)’, in *The Routledge Handbook of Great Power Competition*, by Brian C. H. Fong and Chong Ja Ian, 1st ed. (London: Routledge, 2024), 127–40.

Central Asian countries do not wish to align themselves with only one country or bloc, nor do they wish to turn their back on Russia. The aim of the multi-vector foreign policy for Central Asia is rather to be enemies with no one and to retain close relations with Russia and China, while taking full advantage of the economic benefits that other partners have to offer. This simultaneously decreases their dependency upon their large neighbours.²⁶

The next chapters will analyse the various dynamics at play in the geopolitics of the region.

26 Ibid.; Stefan Meister and Judith Heckenthaler, '[Upgrading EU-Central Asia Cooperation](#)', DGAP, 2 August 2024; Timon Ostermeier, '[Central Asia: Facing 5 Assertive Presidents, Germany's Scholz Gets Rebuffed on Ukraine](#)', *The Diplomat*, 18 November 2024.

3 Slumbering conflicts over water, land, and borders

Since the dissolution of the Soviet Union in 1991, conflicts in Central Asia have simmered in the background and have escalated once in a while.²⁷ At the heart of these conflicts lie disputed and sometimes arbitrary-looking borders. These have been the subject of negotiations characterised by “intense power struggles, economic coercion, covert agreements, and rising nationalist sentiments”, against the background of mutual distrust and public dissatisfaction.²⁸ Kyrgyzstan and Tajikistan, for example, share a 976-kilometer border, of which more than a third used to be disputed until just last year.

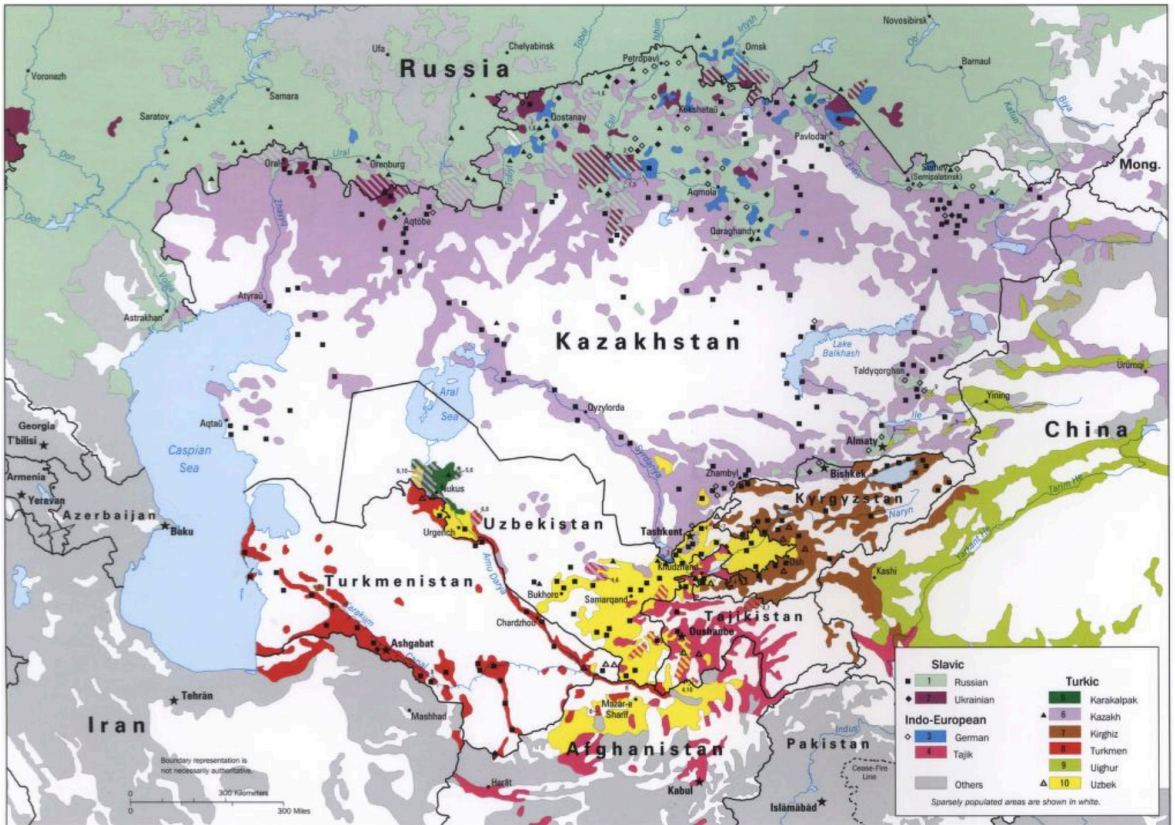
An often cited theory is that Soviet authorities intentionally created complex borders as part of a ‘divide and rule’ strategy, but this only partially explains the current situation. The borders were delineated by Soviet cartographers working alongside local Communist Party officials, based on amongst other points of information census data and ethnographic studies, in an attempt to reflect the intricate ethnic mosaic of the region.²⁹

27 Parts of an earlier Clingendael publication in Dutch have been reproduced in this introduction. See: Bob Deen and Niels Drost, [‘Tadzjikistan en Kirgizjē: een gevecht om water, grond en grenzen’](#), Platform RAAM, 19 July 2021.

28 [‘Central Asia: Border Disputes and Conflict Potential’](#), International Crisis Group, 4 April 2002.

29 Alexander Morrison, [‘Stalin’s Giant Pencil: Debunking a Myth About Central Asia’s Borders’](#), Eurasianet, 13 February 2017.

Figure 3 A map of the borders and major ethnic groups in Central Asia in 1993 after gaining independence from the Soviet Union, indicative of the ethnic diversity of the region³⁰



Nevertheless, borders that used to be merely internal divisions between Soviet republics suddenly became international borders after the collapse of the Soviet Union. Populations that used to be united under the same country suddenly found themselves on opposite sides of the border, sometimes even completely cut off from their homelands in enclaves, as visualised in figure 3. As one interviewee described the situation: “In Soviet times things used to be good – different

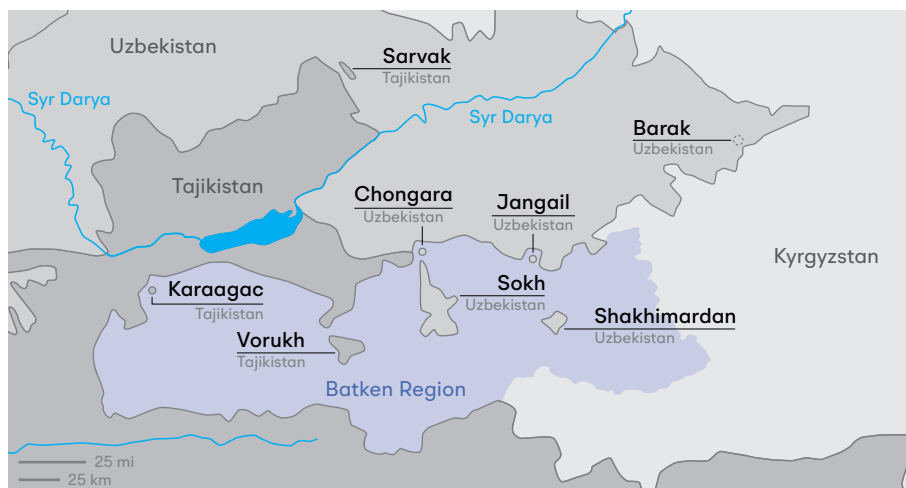
30 ‘Major Ethnic Groups in Central Asia’, image (United States Central Intelligence Agency, 1993), Library of Congress Geography and Map Division Washington, D.C.

peoples used to eat plov [a local rice dish] together; now, resources decide the relationship and there is no arbiter”.³¹

The Fergana Valley is a striking example of this, where six enclaves divided between Kyrgyzstan, Uzbekistan, and Tajikistan are located – in the most fertile and densely populated area of Central Asia. Their inhabitants therefore compete for access to water, pastures, and agricultural land. The last time that similar issues spiralled out of control was in April 2021, over disputes at the Golovnoi water distribution point on the Kyrgyzstan-Tajikistan border, and in September 2022, when Tajik and Kyrgyz soldiers exchanged gunfire on the border between Batken and Soghd.³²

While territorial disputes and claims are fundamental in this conflict, clashes over access to water and other resources further escalate the existing tensions. The most recent conflicts with the worst impact occurred in 2021 and 2022, in which many civilians on both sides of the borders were killed.³³

Figure 4 Map of the enclaves in the Fergana Valley, including the former Kyrgyz exclave of Barak in Uzbekistan³⁴



31 Interview, Astana, May 2024.

32 Asef Doolotkeldieva and Madeleine Reeves, ‘Escalating Conflict on the Kyrgyz-Tajik Border: Whither the Regional Security Order?’, *The Diplomat*, 22 September 2022.

33 Ibid.

34 ‘Border Disputes in Central Asia’, *Geopolitical Futures*, 7 May 2021.

Now, a few years later, things look much better. At the end of 2024, Kyrgyzstan and Tajikistan have settled their border disputes.³⁵ Earlier in 2024, both agreed on the sovereignty of each state over its exclaves – while guaranteeing unrestricted access for transport and communication links between the exclaves and each country.³⁶ And in April 2024, Uzbekistan and Kyrgyzstan agreed on a “historic border deal” in which Uzbekistan incorporated the former Kyrgyz exclave of Barak, in exchange for an equivalent portion of Uzbekistan’s Andijon province.³⁷

Similarly, relations between Uzbekistan and Tajikistan have significantly improved since the settlement of their border dispute, which could prove to be an example for other Central Asian states’ efforts to settle issues over border demarcation.³⁸

35 Putz, ‘After 33 Years, Kyrgyzstan and Tajikistan Announce Border Agreement’.

36 Paul Goble, ‘[Precedent-Setting Accord Between Kyrgyzstan and Tajikistan May Save Exclaves](#)’, The Jamestown Foundation, 5 December 2023.

37 Chris Rickleton, ‘[Farewell Barak: Uzbekistan Absorbs Kyrgyz Exclave As Part Of Historic Border Deal](#)’, Radio Free Europe/Radio Liberty, 23 April 2024.

38 ‘[Tajikistan, Uzbekistan Reportedly Reach Border Settlement](#)’, Eurasianet, 5 November 2019.

4 The water-energy-food nexus



In August 2024, Central Asia’s energy ministers met in Astana for the “first” time.³⁹ On the agenda were collective projects, such as hydropower generation and Tajikistan’s ambition to once again join the Central Asian Integrated Power System (CAPS), an integrated power system through which Central Asian states could exchange electricity during Soviet times. Both issues are very topical at this point in time.

During Soviet times, the Central Asian republics would exchange electricity through a system that took the needs of all five republics into account. So, from spring onwards, upstream Kyrgyzstan and Tajikistan would use the water flow to generate power in their hydro plants and to simultaneously allow the three downstream countries to irrigate their lands. In winter, the two upstream countries would collect the water and relied on the fossil energy generation of Kazakhstan, Uzbekistan and Turkmenistan.

Today, this exchange no longer functions. After their independence, the Central Asian states started to disconnect from the system due to various disputes surrounding energy generation, transit, and water-sharing arrangements.⁴⁰

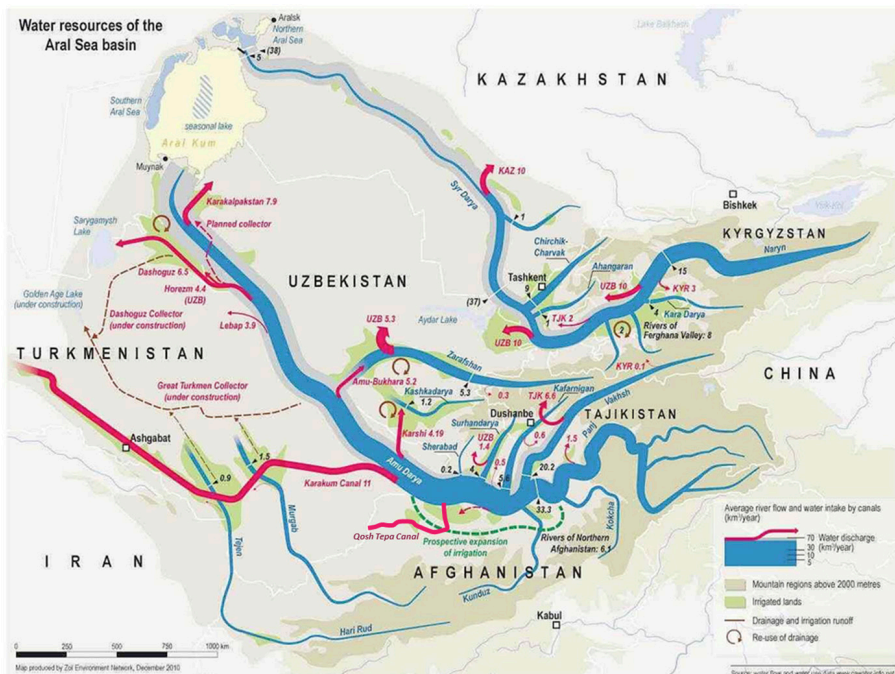
39 Catherine Putz, ‘[Central Asian Energy Ministers Hold “First” Meeting](#)’, *The Diplomat*, 8 August 2024.

40 Peter Krasnopolsky, ‘[Reviving Energy Interdependence in Central Asia](#)’, *The Diplomat*, 2 July 2024.

Instead of taking the needs of all of Central Asia into account in their national policies, national interests started to be paramount.

This meant that the upstream countries had to release the water streams in the winter as well, in order to generate enough power. This caused less water to be stored for release during the agricultural season, resulting in a reduced water flow toward the downstream countries during that season. An idea raised in the past was to allow the downstream countries to pay for increasing the water flow in the agricultural season, but the downstream states perceived this as a bizarre notion. As one interviewee argued: “Why would downstream countries pay upstream countries to let the water flow during the agricultural season? Imagine that the Netherlands would have to pay Switzerland for letting the rivers flow – I cannot imagine this happening.”⁴¹

Figure 5 The main rivers of Central Asia, the Syr Darya and Amu Darya, flow from upstream Kyrgyzstan and Tajikistan (and Afghanistan) towards downstream Kazakhstan, Turkmenistan, and Uzbekistan⁴²



41 Interview in Dushanbe, Tajikistan, May 2024.

42 ‘The Aral Sea Basin’, image, CAWATERinfo, edited by Clingendael to include the Gosh Tepa Canal.

There is a complex interplay of competing trade-offs among water, energy, and food security in Central Asia. While the region is rich in water and energy resources in general, both are scarce at national levels as they are unequally distributed.⁴³ The origins of the two biggest rivers in Central Asia, the Syr Darya and Amu Darya, can be traced back to Kyrgyzstan and Tajikistan (and Afghanistan). These upstream countries possess the highest water reserves in the region. The main use (85%) of that water, on the other hand, takes place at their downstream neighbours – primarily for irrigation.⁴⁴ And while Kazakhstan, Uzbekistan, and Turkmenistan have large reserves of oil, gas, and coal, their upstream neighbours are dependent on the further development of their hydropower generation without regional cooperation on water and energy.

Energy security is one of the main priorities for the Central Asian countries. For instance, Tajikistan's flagship project, the Roghun Dam, has been in development for decades – starting in 1976 in the Soviet Union. From 2016 onwards it has gained a new impulse with various investments,⁴⁵ amongst others from the World Bank, Asian Development Bank (ADB), European Investment Bank (EIB), European Bank for Reconstruction and Development (EBRD), and Islamic Development Bank (IDB).

The aim of the Roghun Dam is to make Tajikistan the energy hub of Central Asia and to supply low-cost electricity for domestic demand and export. The World Bank estimates an average annual generation of 14,4 TWh, corresponding to about 70 percent of the current total generation in Tajikistan.⁴⁶ While the export of electricity to neighbouring countries could potentially lead to increased cooperation in Central Asia, the project has so far faced continued criticism from Uzbekistan.

Concerns include the dam's possibility to seriously reduce the amount of water flowing into Uzbekistan, which puts its agricultural economy and food production at risk. But while the previous president of Uzbekistan, Karimov, fiercely opposed

43 Behrooz Abdolvand et al., ['The Dimension of Water in Central Asia: Security Concerns and the Long Road of Capacity Building'](#), *Environmental Earth Sciences* 73, no. 2 (2015): 897–912.

44 Aibek Zhupankhan, Kamshat Tussupova, and Ronny Berndtsson, ['Could Changing Power Relationships Lead to Better Water Sharing in Central Asia?'](#), *Water* 9, no. 2 (2017): 139.

45 Catherine Putz, ['Dam Deja-Vu: Construction Begins at Rogun'](#), *The Diplomat*, 1 November 2016.

46 ['Project Information Document \(PID\): Sustainable Financing for Rogun Hydropower Project \(P181029\)'](#), The World Bank, 20 June 2023.

the project and threatened with the prospect of war, his successor Mirziyoyev agreed to buy electricity from Roghun.⁴⁷ Moreover, closer cooperation between Tajikistan and Uzbekistan could reduce the dam's impact on downstream irrigation.⁴⁸

Besides the trepidations from Uzbekistan, there are more widespread concerns over human rights, corruption, and the potential mismanagement of the dam. Multiple NGOs report that the Roghun Dam could displace over 40,000 people and report that the World Bank's Environmental and Social Impact Assessment (EISA) of the project does not meet the formal requirements.⁴⁹ There are also concerns about the high levels of corruption in Tajikistan, which could hinder the construction of the \$6 billion project.⁵⁰

Energy security is a priority in Kyrgyzstan as well: From 2013 onwards the country has been reviving its largest hydroelectric project, the Toktogul Dam, and has planned a series of other dams on the Naryn river.⁵¹

Another issue is the Soviet legacy of inefficient usage of the available water. It is estimated that the Central Asian states use 150% more water for irrigation than the recommended volume, and their irrigation systems are very inefficient and wasteful in delivering water to the fields.⁵² In combination with the intense cultivation of cotton – a thirsty crop that requires a lot of water – this has had detrimental consequences for the Aral Sea in Kazakhstan and Uzbekistan. Much of it has already been tapped away, leading to an environmental disaster and the disappearance of the Sea.⁵³

An important regional institution is the International Fund for Saving the Aral Sea (IFAS). This fund was established in 1993 by the five Central Asian heads

47 [‘Uzbek Leader Sounds Warning over Central Asia Water Disputes’](#), Reuters, 7 September 2012; [‘Uzbekistan Commits to Buying Power from Tajikistan’s Roghun Plant’](#), Eurasianet, 3 June 2022.

48 Zhupankhan, Tussupova, and Berndtsson, ‘Could Changing Power Relationships Lead to Better Water Sharing in Central Asia?’.

49 Rivers without Boundaries et al., ‘[Early Warning Alert: Rogun HPP Project ESIA](#)’, March 2024.

50 David Trilling, ‘[Tajikistan Using DC Proxies to Build Support for Rogun Dam](#)’, Eurasianet, 13 February 2024.

51 Zhupankhan, Tussupova, and Berndtsson, ‘Could Changing Power Relationships Lead to Better Water Sharing in Central Asia?’.

52 Ibid.

53 Elena Gordillo, ‘[Is the Aral Sea a Lost Cause?](#)’, *The Diplomat*, 1 February 2023.

of state in order to tackle the environmental crisis of the Aral Sea. IFAS' main objectives include financing joint interstate environmental and scientific research programmes aimed at saving the Aral Sea and improving the socio-economic environmental issues of the region.⁵⁴

During the Consultative Meeting of 2021, the Central Asian leaders discussed ways to improve IFAS' organizational structure and legal framework. They recognized the importance of strengthening regional cooperation in mitigating the effects of climate change, as well as improving a rational use of water and energy resources.⁵⁵ International partners like the EU and the World Bank support these efforts as part of the Central Asia Water & Energy Program (CAWEP, which is discussed in more detail in Chapter 3).

However, some IFAS member states are reluctant to alter the status quo, and alternative suggestions for reform reflect different national interests.⁵⁶ In 2016, for instance, Kyrgyzstan decided to freeze its participation in IFAS due to diverging views.⁵⁷ This showcases the paramount need to address political tensions and limited trust to enable greater regional cooperation.

54 ['About IFAS'](#), Executive Committee of the International Fund for Saving the Aral Sea, accessed on 14 June 2024.

55 'IFAS Reform in the Focus of the Consultative Meeting of the Haeds of State of Central Asia', Executive Committee of the International Fund for saving the Aral Sea, accessed via [archive.org](#), 6 August 2021.

56 ['CAWEP Annual Report 2019'](#), Central Asia Water and Energy Program, 2019.

57 ['Kyrgyzstan Has "Frozen" Participation in Operation of the International Fund for Saving the Aral Sea'](#), TAG news, 20 May 2016.

5 Russia as a systemic factor



In November 2023, during Putin’s visit to Kazakhstan, a video went viral showing Kazakhstan’s President Tokayev beginning his remarks in Kazakh, while the Russian delegation hastily reached for their translation headsets.⁵⁸ This awkward moment prompted questions about whether Tokayev’s remarks were indicative of Russia’s waning influence in Central Asia. What was not shown, however, was how this was merely a brief intermezzo in a long Russian-language dialogue. Nevertheless, it left observers wondering to what extent Russian soft power and influence are truly waning in Central Asia.

Despite such questions surrounding Russia’s declining power in the region, it remains a crucial systemic factor in Central Asia. Russia wields both hard and soft power through its historical, linguistic, and cultural connections, while also maintaining control over regional institutions, military presence, security apparatuses, diaspora populations, and economic dependencies.⁵⁹

58 Justin Burke, ‘[Kazakh President Uses Language to Deliver a Surprising Message to Russia](#)’, *Eurasianet*, 10 November 2023.

59 Jeremy Cohen et al., ‘[Balanced Geopolitics: International Actors in Central Asia](#)’, *Caspian Policy Center*, April 2024.

Hard power: Russian regional organisations, security, energy, trade

Russian-led regional organisations

Russia’s systemic presence in Central Asia is reflected in its central role in the region’s regional political, political-security, and economic organizations. The country leads the Eurasian Economic Union (EAEU), the Collective Security Treaty Organization (CSTO), and the Commonwealth of Independent States (CIS).⁶⁰ Through these organisations, Russia had yielded significant influence over the Central Asian states’ economies, elites, academic communities, and societies.⁶¹

Table 1 Central Asian membership of Russian-led regional organisations

	Uzbekistan	Kazakhstan	Tajikistan	Kyrgyzstan	Turkmenistan
CIS	X	x	x	X	*(Associated member)
EAEU	*(Observer)	x		X	
CSTO		x	x	X	

Already before the Russian full-scale invasion of Ukraine, Russian scholars argued that while the Central Asian states are indeed actors with agency that increasingly adopt multi-vector foreign policy, the “integration of Central Asian nations with Russia and China [is] the only available option”, considering political and military integration through these organisations.⁶²

Russian military presence

Although China has exceeded Russia in terms of total trade with the region, Russia continues to be the main security guarantor in Central Asia.⁶³ Besides maintaining a significant military infrastructure in three out of the five Central Asian states, Russia also plays a key role in preserving the internal stability of the Central Asian regimes. For example, Russia’s military closely followed the violent events across Kyrgyzstan in 2010, although it did not intervene despite

60 Ibid.

61 Yurii Poita, ‘[Russia’s Geopolitical Strategy in Central Asia](#)’, New Geopolitics Research Network, 3 October 2023.

62 Andrei Kazantsev, Svetlana Medvedeva, and Ivan Safranchuk, ‘[Between Russia and China: Central Asia in Greater Eurasia](#)’, *Journal of Eurasian Studies* 12, no. 1 (2021): 57–71.

63 Andrea Kendall-Taylor, Lisa Curtis, Kate Johnston and Nathaniel Schochet, ‘[Russia and China in Central Asia: Cooperate, Compete, or De-conflict?](#)’, CNAS, 12 November 2024.

requests from the Kyrgyz government.⁶⁴ In contrast, when violent unrest amongst the Kazakh population led to mass protests in cities across the country in January 2022, the then newly installed President Tokayev asked the CSTO for help. In response to the protests, 3,000 Russian, 500 Belarusian, 200 Tajik, 150 Kyrgyz and 70 Armenian “peacekeepers” were reportedly sent by the CSTO to Kazakhstan.⁶⁵ Although they did not intervene directly, it nevertheless showed the significance of Russia’s role in protecting the status of Central Asia’s ruling elites and solidified its role of guaranteeing stability in the region.⁶⁶

Furthermore, Russia has the largest military presence in Central Asia, as evidenced by both the 7,000 troops it has stationed in Tajikistan and the physical infrastructure in the form of the Russian Joint Military Base in Kyrgyzstan, including the Kant airbase, the Baikonur Cosmodrome in Kazakhstan, and the many radar stations and testing locations it administers in the region.⁶⁷ Russia’s largest foreign military base, the 201st Military Base, is located in Tajikistan. It also leases a Tajik base near the Afghan border.⁶⁸

Russia is also the largest supplier of military materials to the region. As shown in Figure 6, from 2018 to 2023, Russia was the largest supplier of arms to all countries of the region except for Turkmenistan.⁶⁹ For instance, Russia supplies the countries with relatively cheap weapons and engages with them on the military-technical level. Kazakhstan also shares air defence and forms units with Russia through the CSTO framework. Because most of the Central Asian states’ armed forces and intelligence agencies rely heavily on Soviet and Russian-made arms and equipment, Russia can exert this leverage to maintain its dominance over the region’s security apparatus.⁷⁰

64 Wojciech Górecki, [‘Russia’s position on the events in Kyrgyzstan \(April – June 2010\)’](#), OSW, 27 July 2010.

65 Jakob Hedenskog and Hugo von Essen, [‘Russia’s CSTO Intervention in Kazakhstan: Motives, Risks and Consequences’](#), Utrikespolitiska institutet, 14 January 2022.

66 Alexander Libman and Igor Davidzon, [‘Military Intervention as a Spectacle? Authoritarian Regionalism and Protests in Kazakhstan’](#), *International Affairs* 99, no. 3 (2023): 1293–1312.

67 Bradley Jardine and Edward Lemon, [‘In Russia’s Shadow: China’s Rising Security Presence in Central Asia’](#), Wilson Center Kennan Institute, May 2020.

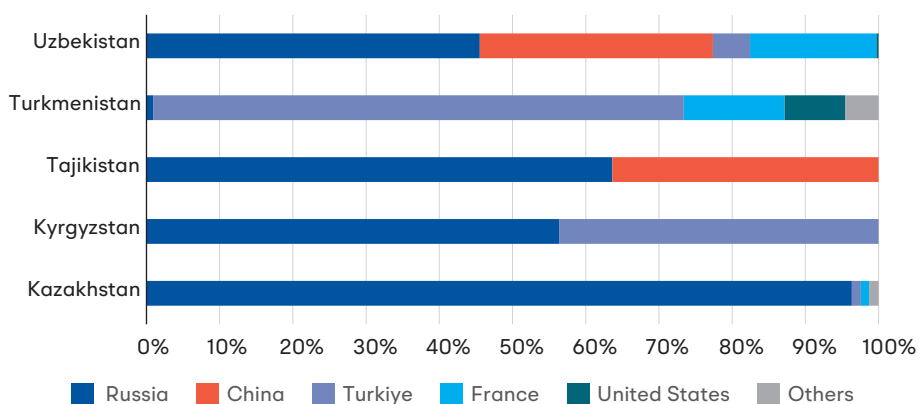
68 Michael S. Repass, Nicole Wolkov, and Richard E. Hoagland, [‘Russia’s Historical Defense Ties and China’s Rising Military Presence in Central Asia’](#), Caspian Policy Center, February 2021.

69 [SIPRI Arms Transfers Database \(c\) SIPRI](#), accessed on 16 January 2024.

70 Poita, ‘Russia’s Geopolitical Strategy in Central Asia’.

Moreover, Russia positions itself in the hearts and minds of Central Asian security personnel through the training of military officers and cadets. Many of the Central Asian military elites have taken courses from the Military Academy of the General Staff of the Armed Forces of the Russian Federation, or have followed training at Russian military universities.⁷¹ These educational bonds are further strengthened through regular multilateral military exercises with Russia’s Central Asian co-members of the CSTO, namely Kazakhstan, Tajikistan, and Kyrgyzstan.

Figure 6 Percentage of arms imports into Central Asia 1994-2023⁷²



Although the countries of Central Asia are increasingly looking towards other actors, such as China and Türkiye, for security cooperation as well, Russia continues to be Central Asia’s main provider of security. Given the clear Russian presence in Central Asia’s military realm, Russia holds a strategic competitive advantage over the region.

71 Michael S. Repass, Nicole Wolkov, and Richard E. Hoagland, ‘Russia’s Historical Defense Ties and China’s Rising Military Presence in Central Asia’.

72 [SIPRI Arms Transfers Database \(c\) SIPRI](#).

Energy security and trade

Russia has repeatedly asserted its dominance over the Central Asian republics through its economic ties to the region. One key example is the Caspian Pipeline Consortium (CPC), which accounts for 80% of Kazakhstan's oil exports to Europe. As the pipeline passes through Russian territory, as visible in Figure 7, Russia can cut off these exports and has done so on several occasions since its full-scale invasion of Ukraine.⁷³

In terms of nuclear power, Russia could potentially gain increased leverage over Central Asian countries as well. Kazakhstan is currently deciding upon which partner will build its first nuclear power plant, and the Russian state-agency Rosatom is one of the candidates. Previously, Uzbekistan signed a deal with Rosatom to build a small nuclear power plant, and Kyrgyzstan is considering this as well.⁷⁴

Rosatom's possible role in the construction remains a sensitive issue due to the resulting additional Russian leverage over the Kazakhstani energy sector. This realization, along with the country's Soviet-past traumas of radiation from nuclear exercises and its effects on local populations, mean that Kazakhstan's nuclear future remains rather uncertain considering the current geopolitical reality.⁷⁵

Through the customs union of the Eurasian Economic Union, Russia also serves as a crucial provider of basic goods to Kazakhstan and Kyrgyzstan.⁷⁶ Besides that, despite its own gas reserves, Uzbekistan depends on Russia for its imports of natural gas. This directly influences many Uzbek households that need the gas during the cold Uzbek winters.⁷⁷ To reduce this dependency, Uzbekistan has attempted to attract investment for wind and solar parks. In the future, Russia

73 Vladimir Afanasiev, '[Kazakhstan's Huge Western-Led Oil Exports Remain Dependent on Crucial Pipeline Route via Russia](#)', *Upstream*, 16 January 2024.

74 Chris Rickleton, '[How Does Central Asia Fit Into Russia's Nuclear Energy Diplomacy?](#)', *Radio Free Europe/Radio Liberty*, 17 October 2024.

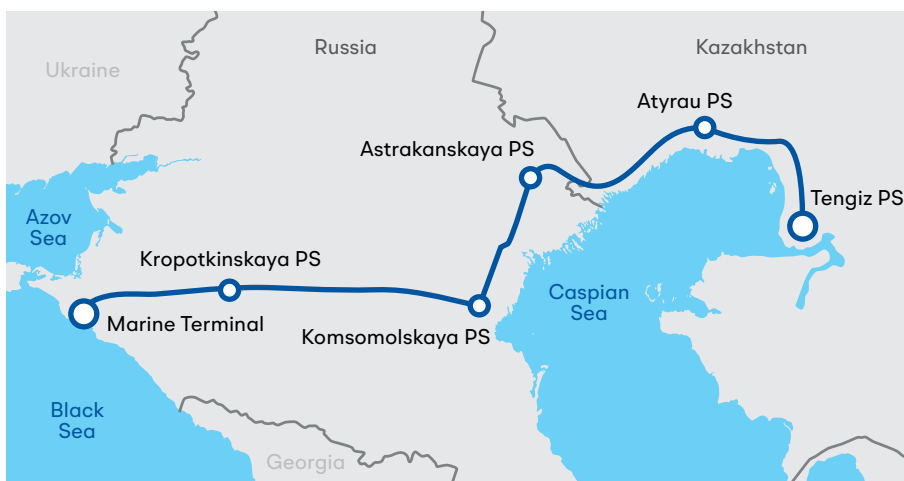
75 Luca Anceschi, '[Kazakhstan in the Middle: The Hidden Politics of the NPP Referendum](#)', ISPI, 18 November 2024.

76 Temur Umarov and Alexander Gabuev, '[Is Russia Losing Its Grip on Central Asia?](#)', *Foreign Affairs*, 30 June 2023.

77 Yunis Sharifli, '[Increased Reliance on Russia and Commitments to China Driving Uzbekistan's Gas Imports](#)', The Jamestown Foundation, 20 May 2024.

may gain even more influence over the region's energy security if the plans to build nuclear power plants in Kazakhstan and Uzbekistan materialize.⁷⁸

Figure 7 The route of the Caspian Pipeline Consortium⁷⁹



Remittances

Russia also wields significant influence over its Central Asian partners through remittances sent by migrant workers from Tajikistan, Kyrgyzstan, and, to a lesser extent, Uzbekistan. These remittances make up a substantial portion of their economies, contributing by estimate up to 32% of Tajikistan's 2022 GDP (\$3.2 billion), 27% of Kyrgyzstan's GDP (\$2.8 billion), and 18% of Uzbekistan's GDP (\$14.5 billion).⁸⁰ This economic reliance creates a strong dependency on Russia, with many Central Asian families directly relying on these remittances for their livelihood. However, Russia itself also relies on this cheap migrant labour due to its own labour shortages, making the relationship mutually dependent.⁸¹

78 Poita, 'Russia's Geopolitical Strategy in Central Asia'.

79 Almaz Kumenov, '[Kazakhstan: CPC Pipeline Shutdown Poses Serious Economic Threat](#)', *Eurasianet*, 23 March 2022.

80 Poita, 'Russia's Geopolitical Strategy in Central Asia'.

81 Alex Little, '[What Repercussions Are Tajiks Facing After the Moscow Terror Attack?](#)', *The Diplomat*, 12 April 2024.

The 2024 Crocus City Hall terror attack in Moscow that was conducted by Tajik citizens has further pressured the Tajik presence in Russia. Many Tajik migrant workers already faced harsh conditions caused by xenophobia and harassment, which have become worse in the aftermath of the attack.⁸²

At the same time, the war in Ukraine has also led to an upsurge in migration flows between Russia and the Central Asian states. While many Russians try to flee political repression and prevent being conscripted for military service in Ukraine, Central Asian labour migrants in Russia are being recruited for 'supportive' roles in Russia's war effort in Ukraine.⁸³ There has also been an upsurge in tourism and highly-skilled labour from Russia to Central Asian countries, due to lenient visa regimes and increased difficulty in reaching the West for Russian elites.⁸⁴

Russian influence decreasing, yet nevertheless present

The war in Ukraine has revived an ongoing debate on the strength of Russia's position within Central Asia. Observers note that Moscow's influence has waned since its full-scale invasion of Ukraine, whereas before the war even China's increased activity in the region was not considered a threat.⁸⁵ However, Central Asian states are increasingly turning to China not only for financial support but also for security cooperation.

This shift is partly due to their reluctance to openly endorse Russia's "special military operation" in Ukraine.⁸⁶ At the same time, it aligns with the region's long-standing multi-vector foreign policy, which was evident during their non-recognition of Russia's 2014 annexation of Crimea and their lack of support for Russia's 2008 war against Georgia.⁸⁷ Faced with the geopolitical realities

82 Laura Gozzi, '[Moscow attack: Central Asian migrants hit by backlash in Russia](#)', BBC, 27 March 2024.

83 Farangis Najibullah, '[Collecting Dead Russians: Central Asians being Lured To Work In Occupied Ukraine](#)', Radio Free Europe/Radio Liberty, 10 March 2023.

84 Yan Matusevich, '[Impacts of Russia's War in Ukraine on Migration in Central Asia](#)', Prague Process, July 2024.

85 Temur Umarov, '[Russia and Central Asia: Never Closer, or Drifting Apart?](#)', Carnegie Endowment for International Peace, 23 December 2022.

86 Mark Galeotti, '[Putin's Suez Moment: He's Watching His Central Asian Empire Drift Away](#)', The Times, 11 March 2023.

87 Umarov, 'Russia and Central Asia'.

of dependence on and historical ties to Russia, the Central Asian states have adopted a posture of “strategic silence”: a diplomatic approach that allows them to signal their disapproval of the war in Ukraine without directly confronting Moscow.⁸⁸ Thus, although Russia’s grip over its (unjustifiable) proclaimed sphere of influence might loosen, the roots through which it does so remain firmly embedded, and Moscow is unlikely to abandon its hold at any time soon.

Furthermore, inter-elite relationships significantly bolster Russia’s soft power in Central Asia. Recent media investigations reveal Moscow’s involvement in corruption schemes that enrich the region’s ruling elites.⁸⁹ These interstate relations are largely managed through personal connections. Additionally, Russia maintains its influence in Central Asia through its security apparatus, particularly the FSB. In this context, Russia is said to still “control the right people” across various levels of the security sector.⁹⁰

Soft power: language, information and education

Moscow remains the region’s cultural hegemon. It smartly employs cultural diplomacy through its shared historical legacy, language, and Russian-speaking and Russia-directed media outlets. Because many Central Asians speak Russian and are familiar with popular products of Russian culture,⁹¹ Russia is able to assert its soft power influence over the region through pro-Kremlin narratives. Russian information warfare is widespread in the region, as evidenced from a Sputnik campaign that disseminates the narrative that the EU is aiming to turn Central Asia against Russia.⁹²

88 Timur Dadabaev and Shigeto Sonoda, ‘[Silence Is Golden? Silences as Strategic Narratives in Central Asian States: Response to the Ukrainian Crisis](#)’, *International Journal of Asian Studies* 20, no. 1 (January 2023): 193–215.

89 Umarov and Gabuev, ‘Is Russia Losing Its Grip on Central Asia?’.

90 Morena Skalamera, ‘[Russia’s Lasting Influence in Central Asia](#)’, *Survival* 59, no. 6 (19 November 2017): 123–42.

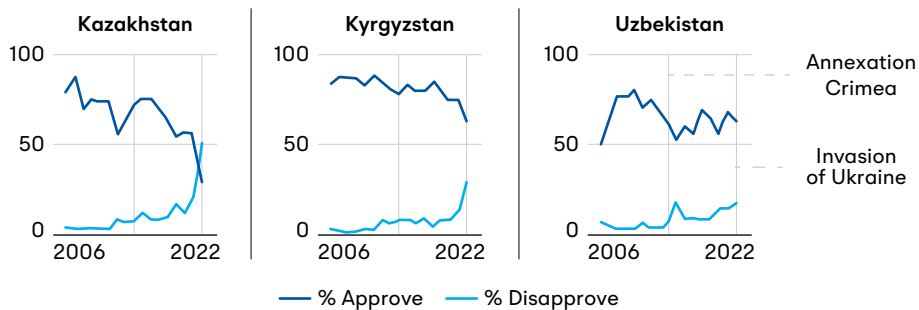
91 Domenico Valenza, Elke Boers and Alessandra Cappelletti, ‘[Between the EU, Russia, and China: Cultural Diplomacy Competition in Central Asia](#)’, in *The European Union, China and Central Asia: Global and Regional Cooperation in a New Era*, ed. Fabienne Bossuyt and Bart Dessein, 1st ed. (London: Routledge, 2021): 200–222.

92 Svetlana Ekimenko, ‘[EU “Stands Little Chance” of Turning Central Asian Nations Against Russia - Analyst](#)’, *Sputnik International*, 2 August 2024.

Moreover, education plays an important function in Moscow’s diplomatic toolbox, especially in its so-called ‘near abroad’. Russia has been working hard to expand the number of universities it hosts in Central Asian states, and also receives a great number of students from Central Asia at its Russia-based universities. It is estimated that 185,000 Central Asian students study in Russia, and 68,000 of those students’ education is funded by the Russian budget.⁹³

Despite these dynamics, a so-called ‘decolonisation process’ is slowly manifesting itself in Kazakhstan. A notable shift can be observed among younger generations in urban centres such as Almaty, where there is a growing reluctance to speak Russian. The war in Ukraine has likely spurred this development, as reflected in the rapid decrease in the approval rates for the Russian leadership amongst the Kazakh, Kyrgyz, and Uzbek populations, as visible in Figure 8.

Figure 8 The proportion of people in Kazakhstan who disapprove of the Russian leadership has now surpassed that of those who approve, and in Kyrgyzstan and Uzbekistan the approval rate has decreased as well⁹⁴



93 Poita, ‘Russia’s Geopolitical Strategy in Central Asia’.

94 Zacc Ritter and Steve Crabtree, ‘[Empire’s Twilight? Russia Loses Support in Its Own Backyard](#)’, *Gallup*, 24 May 2023.

Adolescents are turning their attention to finding a Kazakh identity that had been lost during Soviet times. A similar rhetorical shift is taking place in Uzbekistan and Kyrgyzstan, where there is a growing challenge to the Soviet narrative. These countries begin to recognize and honour the victims of Soviet repression, marking a significant departure from previous historical interpretations.⁹⁵ However, these developments are largely confined to the higher political ranks and specific parts of Central Asian societies. The average citizen tends to remain largely unaware of or indifferent to this “decolonization” process.

Circumvention of sanctions

Since Russia’s full-scale invasion of Ukraine, Central Asia has witnessed a rapid proliferation of new businesses. Like mushrooms after a rainstorm, new import-export companies are sprouting across Kazakhstan, Kyrgyzstan, and Uzbekistan. This surge coincides with a dramatic increase in exports from these countries to Russia, while the European Union’s exports to the country fell by over half between 2021 and 2023, as visible in Figure 9.

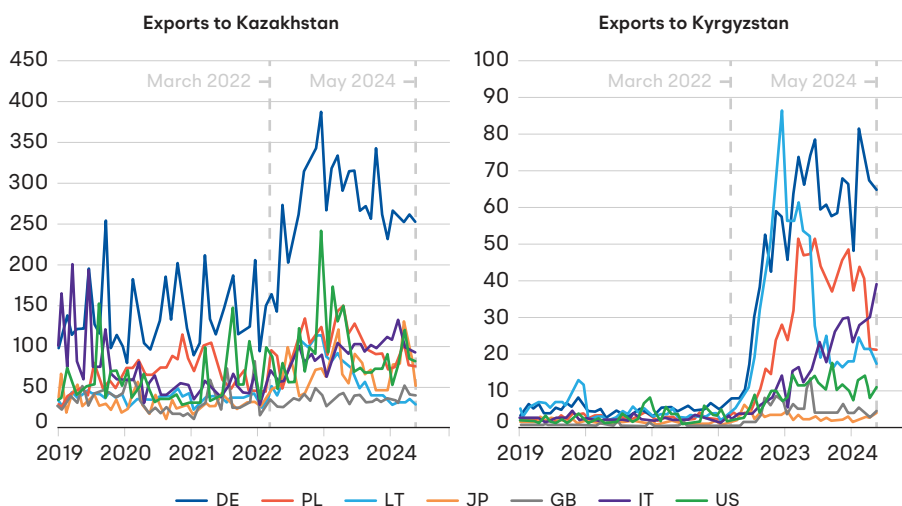
The numbers are striking: Kyrgyzstan’s exports to Russia soared to a 250% volume increase in 2022. Between 2021 and 2023, Kazakhstan’s exports to its northern neighbour rose by 39%, Kyrgyzstan’s by 90%, and Uzbekistan’s by 77%.⁹⁶ Curiously, many of these exported goods are neither produced nor traditionally exported by these Central Asian nations.⁹⁷ As both Kazakhstan and Kyrgyzstan are members of the EAEU, these goods can flow to Russia through their integrated markets with Russia.

95 Murtazashvili and Umarov, ‘Nobody’s Backyard: A Confident Central Asia’.

96 Moscow Times Reporter, ‘[Should the West Sanction Russia’s Neighbors in Central Asia?](#)’, *The Moscow Times*, 16 September 2024.

97 Joby Warrick, ‘[In Central Asia, a Hidden Pipeline Supplies Russia with Banned Tech](#)’, *The Washington Post*, 18 July 2023.

Figure 9 Exports from Germany (DE), Poland (PL), Lithuania (LT), Japan (JP), the United Kingdom (GB), Italy (IT), and the United States (US) to Kazakhstan and Kyrgyzstan between 2019 and May 2024 show a significant change since the Russian full-scale invasion of Ukraine in 2022⁹⁸

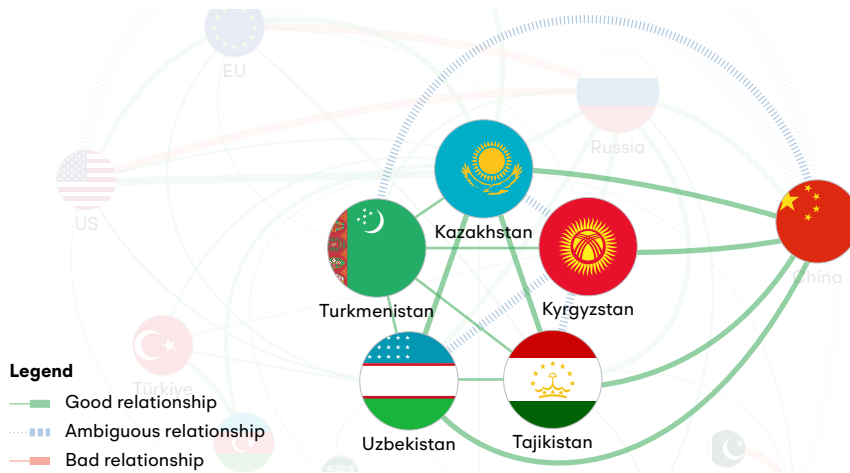


In one instance, *The Washington Post* revealed a now-halted sanctions evasion scheme in which a Kyrgyz company purchased Chinese drones labelled as heavy-duty crop dusters for agricultural purposes with the aim of reselling them to a Russian company. The drones, which can carry 70 pounds in volume, incited fears among U.S. intelligence officials who were worried that such drones could be weaponized, possibly for chemical warfare against advancing Ukrainian troops. Although these drones were intercepted at the Kazakh-Kyrgyz border due to incorrect export paperwork, officials noted that such products frequently evade interception and successfully reach Russia.⁹⁹

98 Ibid.

99 Ibid.

6 China's consolidated position



Over ten years ago, President Xi Jinping chose the Nazarbayev University in Kazakhstan to announce the Belt and Road Initiative (BRI) for the first time. Speaking to students and staff about the great and poetic narratives of the ancient Silk Road, he argued that China and Central Asia needed to deepen their economic ties, cooperation, and development in modern times as well.¹⁰⁰

This speech and the announcement of the BRI is symbolic of China's re-engagement with Central Asia over the past two decades. Whereas China was rather absent in the region immediately after Central Asian countries gained independence, China has stepped up its ambition over the past few years. Its focus has shifted from a primary interest in establishing good relations, countering terrorist threats, and securing the borders with its Central Asian neighbours in the beginning towards taking up a leading role in the region – both in terms of economic investments and political ties.¹⁰¹

100 Xi Jinping, 'Speech in Astana, Kazakhstan, on Building a Silk Road Economic Belt with Central Asian Nations', USC US-China Institute, accessed via archive.org, 7 November 2013.

101 Fabienne Bossuyt and Bart Desein, '[The European Union, China and Central Asia: Global and Regional Cooperation in a New Era](#)', 1st ed. (London: Routledge, 2021), 1-285; Fabienne Bossuyt, '[Engaging with Central Asia: China Compared to the European Union](#)', in *China, the European Union and the Developing World*, ed. Jan Wouters, Jean-Christophe Defraigne, and Matthieu Burnay (Edward Elgar Publishing, 2015): 210-236.

During the times of the Soviet Union and Russian Empire, connectivity in the region was designed to flow north-south. Now that China has stepped in, initiatives such as the BRI have increasingly connected the region from the west to the east. Through roads, railways, terminals, and pipelines that connect Europe and Asia, the BRI plays an important role in the Chinese approach and reach to the region.¹⁰² One such project is the planned China-Kyrgyzstan-Uzbekistan (CKU) railway that will offer a shorter route for cargo compared to the current routes through Russian territory.¹⁰³

In terms of trade and investment, China has already replaced Russia as Central Asia's principal economic partner.¹⁰⁴ Last year, trade turnover between China and the Central Asian states amounted to 90 billion USD – twice as much as between the region and Russia.¹⁰⁵ The China-Central Asia Summit that took place in the same year resulted in more than three billion USD in Chinese investments – leading to a total value of 65 billion USD in Chinese investments.¹⁰⁶

Chinese investments are quite visible in the region. Take Tajikistan for example, where the cities' architecture has drastically changed over the past decade with many new buildings built by Chinese constructors, such as the new Parliament. Such “architectural marvels in Dushanbe stand as testament to China-Tajikistan friendship”, according to the Chinese State Council.¹⁰⁷ On the streets of Dushanbe, the roads are filled with Chinese electric taxis and Chinese brands of (electric) vehicles such as BYD and ZEEKR have seen an increase in their market shares – even though the infrastructure for electric vehicles is limited in the region.

Finally, Chinese cultural engagements have also strengthened, of which educational exchanges are a good example. China offers many opportunities for Central Asian students to study at Chinese universities, increasing China's

102 Cohen et al., 'CPC | Balanced Geopolitics'.

103 Catherine Putz, '[China-Kyrgyzstan-Uzbekistan Construction to Begin in October, Kyrgyz President Says](#)', *The Diplomat*, 8 May 2024.

104 Lea Melnikovová, '[China's Interests in Central Asian Economies](#)', *Human Affairs* 30, no. 2 (1 January 2020): 239–52.

105 Umarov, 'What Does Xi Jinping Want From Central Asia?'

106 Meray Ozat, '[Navigating China's Path to Engagement in Central Asia](#)', Caspian Policy Center, 22 August 2023.

107 '[Architectural Marvels in Dushanbe Stand as Testament to China-Tajikistan Friendship](#)', The State Council – The People's Republic of China, 6 July 2024.

regional soft power. As students learn more about China through their studies abroad, they open up towards the country. As one interviewee in Bishkek indicated: quite a few students who went to China knew nothing about the country and even had Sinophobic ideas before leaving for the country – now they hold much more positive attitudes towards China and have even learned Mandarin.¹⁰⁸ This also makes elites in Central Asia less sceptical about the increasing Chinese engagement in the region. Some of them have perceived these to challenge both their political establishments and cultural models,¹⁰⁹ and are concerned about the treatment of Central Asian minorities in Chinese Xinjiang. Sinophobic sentiments are a Soviet legacy, stemming from the Sinophobic propaganda that followed after the Sino-Soviet split of the 1960s.

Security interests

Not just Chinese economic engagement have grown over time – Chinese security interests in the region have done so too. As Central Asia is becoming an important Eurasian transit hub, as well as a BRI focal point, it becomes increasingly important for China to protect these interests and maintain stability in the region. In China's view, possible threats include terrorism, potentially coming from Afghanistan or from Uyghur nationalists in Central Asia. This is in line with China's policy of fighting the three evils: ethnic separatism, religious extremism, and violent terrorism.¹¹⁰

China has stepped up its security presence in the region. Between 2018 – 2023, China provided 32% of the weapons imports of Uzbekistan and 36% of Tajikistan (see figure 6),¹¹¹ and it has constructed military infrastructure in Tajikistan.¹¹² China also cooperates with Central Asian states in joint military exercises and trainings and assists with emergency management and law enforcement.¹¹³

108 Interview in Bishkek, May 2024.

109 Valenza, Boers, and Cappelletti, 'Cultural Diplomacy Competition in Central Asia', 16.

110 Edward Lemon and Bradley Jardine, '[Parallel Order Building: China's Changing Role in Central Asia's Security](#)', in *Shifting Security and Power Constellations in Central Asia and the Caucasus*, ed. Marie-Sophie Borchelt Camêlo and Aziz Elmuradov (Nomos Verlagsgesellschaft mbH & Co. KG, 2024), 41–66.

111 [SIPRI Arms Transfers Database \(c\) SIPRI](#).

112 Paul Goble, '[China Increasing Its Military Presence in Tajikistan](#)', The Jamestown Foundation, 18 July 2024.

113 Meister and Heckenthaler, 'Upgrading EU-Central Asia Cooperation'.

These initiatives primarily take place on a bilateral level between the Central Asian states and China.

Another aspect of the Chinese security presence in the region takes form in the shape of the SCO – a political, economic, and security partnership led by China of which all Central Asian republics are members, except for Turkmenistan. From its inception in 1996 as the Shanghai Five, the SCO engaged in various security-related issues. It helped for instance to establish the borders between the Central Asian states and China after the fall of the Soviet Union, organised military exercises, and functioned as a meeting platform for the security and defence elites of all member states.¹¹⁴

However, as Russia feared that China would gain too strong a position in the region, it focused its initiatives through the CSTO and prevented the SCO from taking on more responsibilities and turning into an organisation with substance. This led to the SCO becoming “little more than a talking club for leaders of friendly countries”.¹¹⁵ As such, China now organises its security initiatives in Central Asia also outside the SCO, with formats that exclude Russia, such as its Global Security Initiative (GSI), the C5+China, and other bilateral or multilateral initiatives.¹¹⁶

Russia-China relations in Central Asia

Despite Russia’s systemic presence in the region, Moscow has not challenged more Chinese participation in Central Asian affairs. Whereas observers of the region had expected Sino-Russian conflict over a variety of issues, including energy, transport corridors, trade, and political and security influence, the two countries’ perspective of shaping an alternative to the liberal US-led order and their shared rivalry with the United States have ensured that these conflicts have not materialized. Russia is also likely to maintain its acceptance of China’s growing role in regional security, which is mainly driven by the Kremlin’s focus on reserving its military and intelligence resources for its war in Ukraine.

114 Temur Umarov, [‘The Shanghai Cooperation Organization Is Ineffective and Irrelevant’](#), Carnegie Endowment for International Peace, 5 July 2024.

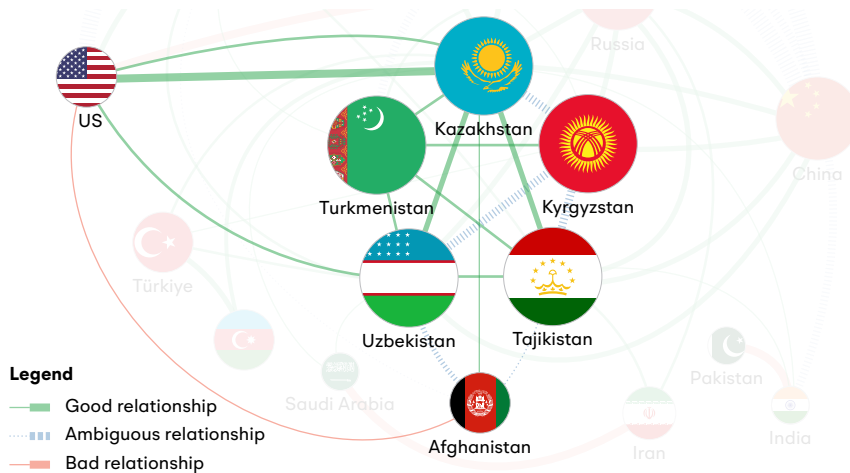
115 Ibid.

116 Adina Masalbekova, [‘How China Is Leveraging Security Cooperation in Central Asia’](#), United States Institute of Peace, 9 November 2024.

Consequently, experts believe that Central Asia may become a testing ground for the two nations' "no limits" partnership, aimed at reshaping the regional order – an agreement solidified just two days before Russia's full-scale invasion of Ukraine.¹¹⁷

117 Kendall-Taylor et al., ['Russia and China in Central Asia'](#).

7 Re-establishment of relations with Afghanistan



Afghanistan is an ongoing matter for the regional dynamics in Central Asia. Traditionally, Central Asia tends to have good or pragmatic relations with Afghanistan, independent of who is in power. Since the US withdrew from the country and the Taliban took over power, Central Asian states have re-established their relations with the Taliban.

Uzbekistan was the first country to do so.¹¹⁸ Kazakhstan has officially accepted the diplomatic credentials from Taliban diplomats and removed the Taliban from the list of banned organisations. Turkmenistan continues its policy of neutrality.¹¹⁹ Kyrgyzstan took the Taliban off the terror list and seeks to normalise ties too, but the ethnic Pamir Kyrgyz in Afghanistan form an issue in the relationship.¹²⁰ The Tajik government views Afghanistan as a threat, due to the large Tajik community

118 Ayaz Gul, '[Uzbekistan Accepts Ambassador from Taliban-Led Afghanistan](#)', *Voice of America*, 10 October 2024.

119 Bruce Pannier, '[Central Asia in Focus: Kazakhstan Officially Accepts Credentials of Taliban Envoy](#)', *Radio Free Europe/Radio Liberty*, 27 August 2024.

120 '[Kyrgyzstan Takes Taliban Off of Its Terrorist List](#)', *Radio Free Europe/Radio Liberty*, 6 September 2024.

in Afghanistan, and warns against an infiltration of its borders, drug trafficking, and the radicalisation of Tajik people. But nevertheless, Tajikistan takes a pragmatical approach: electricity to Afghanistan keeps flowing.¹²¹

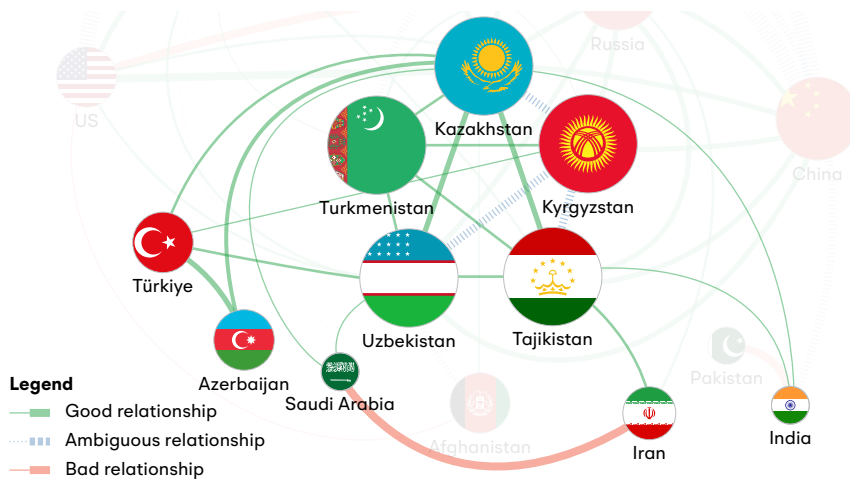
A stable and calm Afghanistan is a priority for Central Asian countries, and pragmatically working with the Taliban is part of that policy. In addition, transboundary issues such as water bring Central Asian states and Afghanistan around the table. As Afghanistan is building the Qosh Tepa Canal, which will divert up to 25% of the water of the Amur Darya's water flow to Uzbekistan and Turkmenistan, these countries rather prefer to collaborate with the Taliban to ensure the canal's efficient construction, rather than enduring a significant reduction in water flows.

Despite the US withdrawal from Afghanistan, the anticipated spillover effects¹²² of internal Afghan instability on the broader region have not materialized as strongly as expected. While the absence of US bases and active military engagement in Central Asia, as seen in the 2000s, has reduced its direct presence, the US is still a large power in the region to date. It maintains substantial investments and embassies in all five countries.

121 Eldar Mamadov and Giorgio Cafiero, '[Tajikistan and the Taliban](#)', The National Interest, 23 July 2024.

122 Dmitri Trenin, '[Afghanistan After the US Pullout: Challenges to Russia and Central Asia](#)', The Carnegie Endowment, 13 July 2021.

8 Other interested actors



Many other actors are interested in working with Central Asia as well, including India, Japan, South Korea, and the US. To keep this chapter and the interactive geopolitical mapping in proportion, we have omitted some and combined other actors and relations into a single chapter.

First, Azerbaijan and Türkiye have increased their engagement with Central Asia. Both countries want to strengthen their connectivity with the region and beyond to form a bridge between Europe and Asia and participate in the TITR. Especially Azerbaijan seems to increasingly position itself as a Central Asian country while building closer relations with Kazakhstan in particular. Turkish and Azerbaijani engagement with Central Asia through the Organization of Turkic States (OTS) also bears a strong cultural element, as all Central Asian countries, except Tajikistan, are Turkic states and observer members of the OTS.

Second, Iran has also worked to strengthen its position in Central Asia. Due to its strategic location, Iran is interested in forming a land bridge between Central

Asia and the South Caucasus, the Middle East, and South Asia.¹²³ Especially Tajikistan as a Persian-speaking country with a large number of Iranian people is a logical partner for Iran, with which it strengthened cooperation in defence after the US withdrawal from Afghanistan.¹²⁴ However, this is a dual relationship that is occasionally strained, for instance, by Tajik accusations in the past that Iran fuelled the civil war in Tajikistan during the 1990s.¹²⁵ The Iranian conflict with Saudi Arabia also plays a role in the Iranian ambition to cooperate with Central Asia, in which Iran aims to bolster its status and prestige in the Muslim world.¹²⁶

The increased attention for the region by Arab Gulf states and their large investments in the energy sector should be mentioned, too. The Gulf States' expanded involvement makes sense in the context of their efforts to restrain Iran and Türkiye, two of their own regional adversaries.¹²⁷ States from the Arab Gulf also build mosques, and Saudi Arabia and Qatar promote Salafism and Wahhabism currents of Islam in the region.¹²⁸

123 Nargiza Umarova, '[How Does Central Asia Cooperate With Iran to Access World Markets?](#)', *The Diplomat*, 3 August 2024.

124 Asna Wajid, '[The Diplomatic Surge between the GCC and Central Asian States](#)', IISS, 13 November 2023.

125 Catherine Putz, '[Tajik State TV Documentary Accuses Iran of Civil War Meddling](#)', *The Diplomat*, 10 August 2017.

126 Guli Yuldasheva, Andris Spruds, and Diana Ptkomkina, '[The Role of Iran and the United States of America in Geopolitics of Central Asia](#)', Latvian Institute of International Affairs, 2017.

127 Wajid, 'The Diplomatic Surge between the GCC and Central Asian States'.

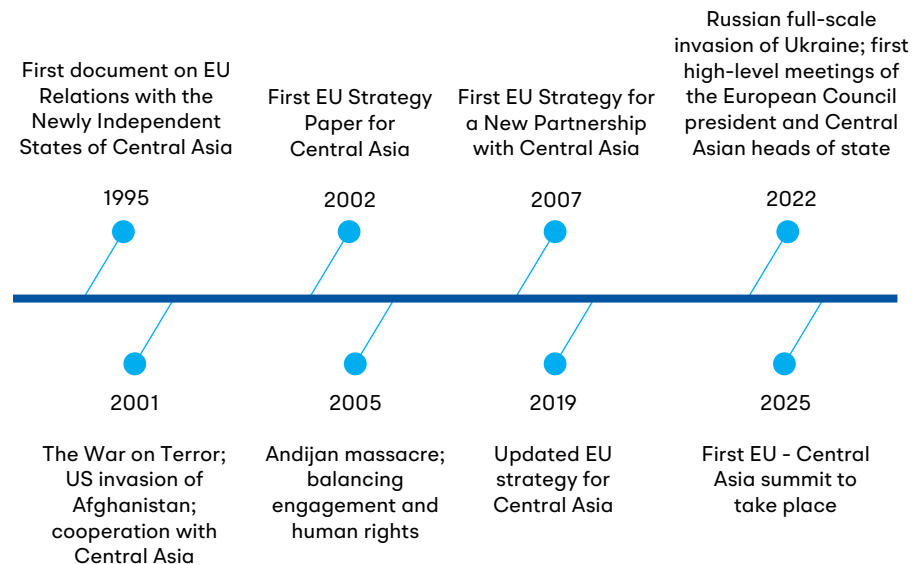
128 Shavkat Ikromov, '[Mosque Diplomacy in Central Asia: Geopolitics Beginning with the Mihrab](#)', *Voices On Cental Asia*, 16 December 2020.

9 Development of EU – Central Asia relations

Over the past decades, EU engagement towards Central Asia has slowly but steadily developed from limited engagement to an important partnership. Especially in the fields of trade, energy, investment, and development aid, the EU is now one of the most important partners for Central Asian countries.¹²⁹ The EU has made significant steps to get to this point. Whereas in the 1990s Central Asia was not amongst the key priorities of the EU, this relation deepened over time.

This chapter gives a brief overview of this history and explores how the EU and the Netherlands in particular could effectively enhance their relations with Central Asia. Based on the local priorities of Central Asian countries, it discusses specific areas where the interests of the parties are aligned, pointing to challenges and opportunities for greater cooperation.

Figure 10 A timeline of key moments and turning points in the EU engagement with Central Asia



129 Bossuyt and Dessein, *The European Union, China and Central Asia*, 57.

In its 1995 document entitled *The EU's Relations with the Newly Independent States of Central Asia*, the EU kickstarted this process by sharing its “geopolitical and economic” interests for the region, in particular towards Central Asia’s energy sector.¹³⁰ In a related memo, the EU expressed its “serious political concerns over human rights and democracy throughout the region”, as well as assessing the economic circumstances of the region, the EU interest and investments, as well as the role of Russia, the US, Türkiye, and China as third countries in the region.¹³¹

The first turning point in EU – Central Asian relations came in 2001 with the US War on Terror and the invasion of Afghanistan.¹³² Western military personnel within the NATO coalition were allowed to use the facilities of Kyrgyzstan, Tajikistan, and Uzbekistan to fight the Taliban, while the interest of the Central Asian countries was to secure their borders.¹³³

This was also the time when Austria initiated the Border Management Programme in Central Asia (BOMCA), which was later made into an EU programme with the goal of securing the region’s external borders, and the Central Asia Drug Action Programme (CADAP) to assist Central Asia in their fight against the drug demand.¹³⁴ A year later, in 2002, the first *Strategy Paper for Central Asia* was published. The EU focused on the provision of technical assistance, such as humanitarian assistance, macro-financial grants, and loans, by allocating fifty million euros a year for a five-year period.¹³⁵ In 2005, the first EU special representative for Central Asia was appointed.¹³⁶

The second key moment in the EU-Central Asian relationship came in 2005, following the Andijan massacre in Uzbekistan. After 23 local businesspeople were accused of extremism, armed men released them from prison, occupied

130 [‘The EU’s Relations with the Newly Independent States of Central Asia’](#), European Commission, 9 June 1995.

131 Ibid.

132 Karolina Kluczevska and Shairbek Dzhuraev, [‘The EU and Central Asia: The Nuances of an “Aided” Partnership’](#), in *Managing Security Threats along the EU’s Eastern Flanks*, ed. Rick Fawn, New Security Challenges (Cham: Springer International Publishing, 2020): 225–51.

133 Bruce Pannier, [‘Will Central Asia Host U.S. Military Forces Once Again?’](#), *Radio Free Europe/Radio Liberty*, 23 April 2021.

134 Kluczevska and Dzhuraev, ‘The EU and Central Asia’.

135 EEAS, [‘Strategy Paper 2002-2006 & Indicative Programme 2002-2004 for Central Asia’](#), 30 October 2002.

136 Khiromon Bakoeva, [‘Central Asia: New EU Envoy A Familiar Face In The Region’](#), *Radio Free Europe/Radio Liberty*, 19 July 2005.

government buildings, and took police officers hostage. The government's assault on the 10,000 protestors that followed ended in a massacre, with 173 people killed according to the Uzbek government and up to 500 according to eyewitnesses. In reaction, the EU and US distanced themselves from Uzbekistan and cut military funding. Former President Karimov likewise turned his back on the West, and ties remained strained until sanctions were lifted step-by-step towards 2009.¹³⁷

This tragedy in Andijan and the subsequent response is indicative of the tensions between human rights and the rule of law on the one hand, and geopolitical and economic interests on the other, of which there are more examples that have played a role in the bilateral relationship over the past decades.

The third and most significant turning point in the relation between Central Asia and the EU came in 2007 when the EU launched its first strategy for the region, entitled *The EU and Central Asia: Strategy for a New Partnership*.¹³⁸ This document presented an “interest in security and stability” and “adherence to human rights” as the most important interests of the EU in the region.¹³⁹ From this point onwards, basic EU cooperation turned into a more structured and increased engagement with the countries of the region.¹⁴⁰

Later on, in 2019 the EU-Central Asia strategy was updated. Although this has been described as “the old EU Central Asia strategy in a fresh PDF” by some, as it regrouped the EU priorities for the region into new categories,¹⁴¹ it is in fact a different document. While the 2007 strategy was developed under a German initiative, the new strategy is based on EU-wide deliberations among member states, several rounds of talks between the EU and the countries of Central Asia, conversations with civil society in the region, and discussions with academia and think tankers in Europe. And compared to the earlier strategy, it is also more specifically aimed at the realities and requirements of individual Central Asian states.¹⁴²

137 Catherine Putz, [‘What Happened 10 Years Ago in Andijan?’](#), *The Diplomat*, 13 May 2015.

138 Kluczevska and Dzhuraev, ‘The EU and Central Asia’.

139 The Permanent Representatives Committee, [‘The EU and Central Asia: Strategy for a New Partnership’](#), Council of the European Union, 31 May 2007.

140 Michael Emerson et al., [‘Into EurAsia – Monitoring the EU’s Central Asia Strategy’](#), EUCAM, 5 February 2010.

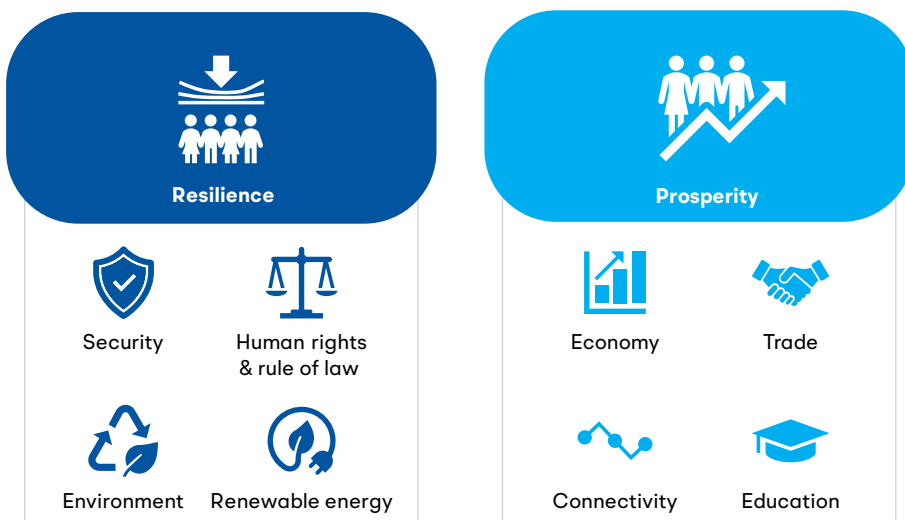
141 Catherine Putz, [‘The European Union’s \(Not So\) New Central Asia Strategy’](#), *The Diplomat*, 16 May 2019.

142 Jos Boonstra, [‘New EU Strategy for Central Asia: First Reactions’](#), EUCAM, June 2019.

In its latest strategy, the overall aim of the EU in Central Asia is “to forge a stronger and nonexclusive partnership with Central Asian states so that the region develops as a more resilient, prosperous, and closely interconnected economic and political space”. These overarching priorities and underlying themes are visualised in Figure 11.¹⁴³ In practice, a third additional and overlapping EU priority for Central Asia is regional cooperation.

After the COVID-19 pandemic and Russian aggression against Ukraine, there have been discussions in Brussels to replace the 2019 strategy. So far the consensus has been that the standing priorities and themes are still valid. The EU did, however, develop a roadmap in 2023 as a sort of annex or to-do list to the strategy.¹⁴⁴ From its strategy the EU picks and chooses, currently stressing the environment and renewable energy in its resilience priority on the left side of Figure 11, and connectivity in the prosperity priority on the right side of the figure.

Figure 11 The EU priorities in its Central Asia strategy¹⁴⁵



143 'EU-Central Asia Relations', EEAS, October 2023.

144 Jos Boonstra, 'EU-Central Asia Connectivity: Using All the Pieces', EUCAM, October 2024.

145 'EU-Central Asia Relations'.

February 2022 marked the latest turning point in the relationship. Due to the Russian full-scale invasion of Ukraine, Central Asian countries once again came into the EU spotlight as potential alternative energy suppliers instead of Russia, similar to the situation in 2006-2009 when Putin started to threaten gas deliveries to Ukraine and the EU. Since 2022, the EU is also increasingly looking towards Central Asia as an alternative transport route, and as a region where the EU could step up its engagement to help countries decrease their dependence on Russia.

Since then, high-level meetings between the European Council president and Central Asian heads of state have taken place, as well as a steep increase in national European visits to the region. Last year the first EU – Central Asia summit was supposed to take place in Samarkand, Uzbekistan, as icing on the cake, but, as yet, it has not been possible to organise this. At the time of writing, there is still no concrete date in sight.

However, beyond such meetings and renewed attention for energy and transport connectivity with Central Asia, a more fundamental change in EU policy towards the region has not consolidated as overall attention and funding are still modest.¹⁴⁶ And despite the progress made since 1991, EU engagement with Central Asia is not perceived as consistent by the actors in the region. Various interviewees shared a similar sentiment, which can be summarized into the following quote:

After the Cold War ended, the West was suddenly interested in Central Asia. This faded away, but from 2001 onwards, when the US invaded Afghanistan, this interest returned – only to fade away yet again. And now that you have problems with Russia, you are once again interested in Central Asia. Will you leave again afterwards? Others, like Russia, China, and Türkiye, have always been here.¹⁴⁷

Moreover, during some of our interviews, interviewees argued there is still little awareness among the population in all five Central Asian countries about the EU and its initiatives. Only after the 2007 Central Asia Strategy did the EU

146 Jos Boonstra, '[Modest but Consistent: EU Policymaking towards Central Asia](#)', *Crossroads Central Asia*, 11 September 2023.

147 Interviews in Astana, Bishkek, Dushanbe, and Tashkent, April – May 2024.

start to become more visible in the region.¹⁴⁸ The EU is aware of this and aims to raise its profile in the region through a “more dynamic and better-targeted communication strategy, presenting the rationale behind its engagement and underlining the opportunities, which the EU-Central Asia partnership can bring to the region and to its citizens.”¹⁴⁹

The foreign policy nature of most Central Asian countries invites working with as many countries as possible – except for Turkmenistan’s neutrality policy. The five Central Asian states are expanding their partnerships with third countries to create better conditions for trade and investment. Both governments and businesses understand the need to diversify their partners, and Europe in particular is an attractive partner as it could offer an alternative path for economic diversification and provide certain technology and know-how which Central Asians cannot receive from Russia and China.¹⁵⁰

Bilaterally, the EU is developing Enhanced Partnership and Cooperation Agreements (EPCAs) with the countries of Central Asia to replace the older Partnership and Cooperation Agreements (PCAs) that previously defined the relationships. These agreements arrange for cooperation in various fields, ranging from investments to energy, transport, education, and more. The EPCA with Kazakhstan (2020) has been ratified and with Kyrgyzstan (2024) signed. With Uzbekistan an EPCA is currently being prepared for signature, with Tajikistan negotiations are still ongoing, and with Turkmenistan there is only an interim trade agreement.¹⁵¹

The EU has argued it wants to become more geopolitical in its dealings worldwide since Ursula von der Leyen became President (elect) of the European Commission in 2019.¹⁵² If the EU wishes to achieve this goal, its policy should be backed up by tangible and deeper engagement that goes beyond energy and

148 Sebastien Peyrouse, ‘[How Does Central Asia View the EU?](#)’, EUCAM, 11 June 2014.

149 High Representative of the Union for Foreign Affairs and Security Policy, ‘[The EU and Central Asia: New Opportunities for a Stronger Partnership](#)’, European Commission, 15 May 2019.

150 ‘[Engaging Central Asia: Empowering the Regional Transformation](#)’, Henry Jackson Society, 16 April 2024.

151 Shreeves, Delivorias, and Caprile, ‘The EU Strategy on Central Asia: Towards a New Momentum?’.

152 Ursula von der Leyen, ‘[Speech by President-elect von der Leyen in the European Parliament Plenary on the occasion of the presentation of her College of Commissioners and their programme](#)’, European Commission, 27 November 2019.

trade, for instance by seriously including education, connectivity, and other elements.

To achieve this commitment, the sections below present some of the key sectors where the EU and the Netherlands in particular could have a unique entry point to the region. These areas are based on the national priorities of Central Asian countries, as well as the policy priorities as formulated in the EU strategy for Central Asia. While all issues are important, the ones related to water management and agriculture should be of particular relevance to the Netherlands in doing its bit.

10 Areas for further EU – Central Asia cooperation

Energy security and green transition

Energy security is one of the key challenges for the region, as outlined in Chapter 4 (*The water-energy-food nexus*). With growing economies and populations, Central Asian countries face a rising energy demand in order to power their development. But the visible impact of climate change calls for a reduction of carbon emissions and a switch to clean energy sources.¹⁵³ Despite having fossil fuel reserves – namely Kazakhstan, Turkmenistan and Uzbekistan – all countries are dependent on Russia for oil and gas imports, and often experience issues with power shortages and blackouts. Hydropower is the largest renewable energy source in the region and is abundant in Kyrgyzstan and Tajikistan. However, it needs to be balanced with the issue of water availability for agriculture in downstream countries.¹⁵⁴

Central Asia used to have a connected grid dating back to Soviet times, as outlined in Chapter 4 as well, but the power connections are not always functional. Sharing more electricity could be possible, but the infrastructure is aging and demands vast investments in upgrading the grid. Moreover, coal is still very prevalent, especially in Kazakhstan, exacerbating other problems related to climate change and air pollution.

EU possibilities for energy security cooperation

The EU has a strategic interest in supporting Central Asia in the energy sector in order to develop further alternatives to Russian oil and gas, to import green energy and CRM, and to mitigate the impact of climate change.¹⁵⁵ This has been a priority throughout the Union's engagement, from the 1995 document on the

153 [‘CAREC Energy Outlook 2030’](#), Asian Development Bank, 2022.

154 [‘EU4Energy Data Explorer’](#), IEA, 30 June 2024.

155 M. Laldjebaev, R. Isaev, and A. Saukhimov, [‘Renewable Energy in Central Asia: An Overview of Potentials, Deployment, Outlook, and Barriers’](#), *Energy Reports* 7 (1 November 2021): 3125–36.

*EU's Relations with the Newly Independent States of Central Asia onwards to the most recent strategy.*¹⁵⁶

Central Asia harbours many critical minerals that are essential for the energy transition and is expected to become a major global supplier.¹⁵⁷ Of the 30 CRM needed by the EU to power its green transition, Kazakhstan currently produces 19.¹⁵⁸ For some CRM, Central Asia has a large share of global reserves: manganese (38.6%), chromium (30.07%), lead (20%), zinc (12.6%), titanium (8.7%), aluminium/bauxite (5.8%), copper (5.3%), cobalt (5.3%), and molybdenum (5.2%)¹⁵⁹ – many of these are located in Kazakhstan.

The EU has already signed a Strategic Partnership MoU with Kazakhstan in November 2022¹⁶⁰ and with Uzbekistan in April 2024¹⁶¹ to secure a diversified and sustainable supply chain of raw materials and refined materials. While Kazakhstan and Uzbekistan have the resources, the EU has the technology and competences. Central Asian counterparts have the ambition to boost both extraction and processing capacity to develop a local industry and foster socio-economic development.¹⁶²

In Central Asia, renewable energy sources (RES) are coming more in vogue. Despite being a gas producer, Uzbekistan has recently become more dependent on Russia to meet its internal demand. Because of long-term supply contracts with China, it has become more difficult to use gas domestically. In fact, to strengthen its energy security, the government recognises the need to invest

156 Kluczevska and Dzhuraev, 'The EU and Central Asia'.

157 Roman Valkuchuk and Indra Overland, '[Central Asia Is a Missing Link in Analyses of Critical Materials for the Global Clean Energy Transition](#)', *One Earth* 4, No.12 (17 December 2021): 1678-92.

158 Genevieve Donnellon-May, '[Kazakhstan's Emergence as a Middle Power: Implications for Western Relations](#) | *Asia Society*', Asia Society Policy Institute, 29 February 2024.

159 Roman Vakulchuk and Indra Overland, 'Central Asia Is a Missing Link in Analyses of Critical Materials for the Global Clean Energy Transition'.

160 '[Strategic Partnership between the European Union and Kazakhstan on Sustainable Raw Materials, Batteries and Renewable Hydrogen Value Chains](#)', European Commission, 8 November 2022.

161 '[EU Establishes Strategic Partnership with Uzbekistan on Critical Raw Materials](#)', Delegation of the European Union to Uzbekistan, 5 April 2024.

162 Charles Szumski, '[EU, Kazakhstan Vow to "Go beyond" Raw Materials-Based Relationship](#)', *Euractiv*, 24 November 2023.

in RES. Solar installations are visibly expanding in the country, especially in the capital Tashkent, with investments from Gulf countries and China.¹⁶³

Kazakhstan is another example. As the EU moves towards the goal of Net Zero by 2050 it will reduce its oil demand; this will have consequences for Kazakhstan's economy. In an EBRD scenario in which a global green transition takes place, Kazakhstan's fiscal revenues are expected to fall by up to 40% in the next 20 years.¹⁶⁴ The country recognizes the need to diversify its economy and invest in other business models, such as green hydrogen and CRM.¹⁶⁵ EU member states like Germany and Sweden are already working towards developing a green hydrogen facility to boost domestic decarbonisation and facilitate exports to Europe.¹⁶⁶

The region has a high potential for wind and solar power but needs large-scale public and private investments to materialise it. To encourage a greater involvement from the private sector, there is a need to improve the business climate through regulatory reforms. De-risking mechanisms and incentives are also crucial to attract the private sector. In Tajikistan, the EU is supporting the Roghun Dam (the substantial hydropower project discussed earlier in Chapter 4, *The water-energy-food nexus*), which is expected to be the tallest in the world and able to supply electricity to the entire region.¹⁶⁷ Financial support from the EU is conditional upon the reform of the energy sector, including an increase in electricity tariffs, which would contribute to attracting more investments. The role of the EU in energy projects differs from China in the sense that it guarantees respect for environmental standards and aims to foster greater regional cooperation, making it an attractive partner.

The EU runs various projects within this context, such as the Sustainable Energy Connectivity in Central Asia (SECCA) as part of the Global Gateway Team

163 Neesha Salian, '[ACWA Power Closes \\$533m Financing for Tashkent Energy Plant](#)', Gulf Business, 2 July 2024; Yunis Sharifli, '[Green New Wave: How China Adapts to Central Asia's Renewable Energy Landscape](#)', Carnegie Endowment for International Peace, 19 April 2024.

164 '[The Fiscal Implications for Kazakhstan of Worldwide Transition to a Greener Global Economy](#)', EBRD, 22 November 2018.

165 '[Kazakhstan Discusses Ways for Achieving Carbon Neutrality and Building Resilience](#)', World Bank, 28 February 2023.

166 Cretti and van Schaik, 'Resource Curse or Darling'.

167 '[EU Plans Investment in World's Tallest Dam in Tajikistan to Dent Russia's Energy Clout](#)', Euractiv, 6 July 2022.

Europe Initiative on Water, Energy and Climate Change in Central Asia.¹⁶⁸ With a budget of almost seven million euros, SECCA aims to diversify the energy mix in the region towards a more sustainable balance.¹⁶⁹ With its advice, technology, and know-how regarding renewables and efficient energy usage, the EU has the ambition to help Central Asia use their natural resources to generate solar, wind, and hydroelectric power.¹⁷⁰

However, due to the wide scope and relatively small budget of the Team Europe Initiative on Water, Energy, and Climate in Central Asia, deep-rooted problems such as corruption and a lack of economic diversity, and the current dependence of Central Asian elites on fossil fuel and raw material revenues, this initiative is assessed as “mission impossible”.¹⁷¹

Moreover, Central Asian countries have an appetite to increase regional energy connectivity and trade. In fact, the region could strengthen its energy security by boosting cross-border interconnections and regional power trade. This would allow countries to reduce the dependency on Russia by harnessing the potential of domestic energy sources, especially RES.¹⁷² To achieve that, there is a need to leverage investments in upgrading grid networks and harmonise market regulations for the energy trade. The EU is seen as an experienced actor with know-how and technology which could provide best practices and technical assistance.

Water management

Water availability is a key issue in Central Asia and is accelerated by the impact of climate change, as outlined in Chapter 4 (see *The water-energy-food nexus*). In the summer of 2023 Kazakhstan declared a state of emergency as the Caspian

168 ‘[Overview](#)’, SECCA, accessed on 14 October 2024.

169 ‘[European Union’s New Project to Boost Sustainable Energy in Central Asia](#)’, Delegation of the European Union to the Republic of Kazakhstan, 17 November 2022.

170 High Representative of the Union for Foreign Affairs and Security Policy, ‘The EU and Central Asia: New Opportunities for a Stronger Partnership’; ‘EU-Central Asia Relations’.

171 Shyngys Zipatolla, ‘[Mission Impossible: The Team Europe Initiative on Water, Energy, and Climate in Central Asia](#)’, EUCAM, 11 July 2023.

172 Georgi Gotev, ‘[Kazakh Expert: Central Asia Needs a Transnational Electricity Grid](#)’, *Euractiv*, 4 July 2023.

Sea had dropped to a critically low level, while Turkmenistan turned off fountains in the capital.

A year later, Kazakhstan was hit by severe floods which caused 117,000 people to evacuate.¹⁷³ In Uzbekistan, freshwater prices even doubled in some regions.¹⁷⁴ Water's link to agriculture and hydropower production makes it essential for the region's future food and energy security. Still, the region struggles to cooperate due to the weak institutional capacity of regional and national institutions as well as a lack of reliable data to inform decision-making.¹⁷⁵ With growing populations as well as climate variability, a sustainable use of transboundary water is already high on political agendas in the region.

Possibilities for EU-Central Asia water engagement

Water management is seen as an area where the EU could provide technical assistance and knowledge exchange. This is in line with the EU ambition to make Central Asian states more resilient against the consequences of climate change, which the region is already dealing with. Melting glaciers and decreased water flows in a region that already faces water scarcity will further impact the region, a challenge the EU aims to help Central Asia to overcome.¹⁷⁶

Since 2009, the EU has participated in the Central Asia Water & Energy Program (CAWEP), a multi-donor trust fund in partnership with the World Bank, Switzerland and the UK. This initiative aims to enable regional cooperation by supporting the development of data-driven regional narratives, building institutional capacity and fostering investments that promote water and energy security.¹⁷⁷ Moreover, in November 2022 the EU launched the previously mentioned Team Europe Initiative on Water, Energy and Climate Change with the EIB, the EBRD, and several member states. This initiative focuses on “developing an integrated regional power market, transboundary water governance, and the inclusion of climate change in the regional political dialogue on water,

173 [‘Almost 117,000 People Evacuated Due to Floods in Kazakhstan’](#), Reuters, 17 April 2024.

174 Jahan Taganova, Anna Shabanova-Serdechna, and Niginakhon Saida, [‘Central Asia’s Water Crisis Is Already Here’](#), *The Diplomat*, 4 January 2024.

175 [‘Central Asia Water and Energy Program \(CAWEP\)’](#), European Union External Action Service, 4 November 2020.

176 High Representative of the Union for Foreign Affairs and Security Policy, ‘The EU and Central Asia: New Opportunities for a Stronger Partnership’.

177 [‘Central Asia Water & Energy Program’](#), World Bank, accessed on 19 December 2024.

energy and the environment”.¹⁷⁸ The estimated value is €700 million, including €200 million from the EU budget.¹⁷⁹

While the initiative focuses only on the five Central Asian countries – Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan – the CAWEP also includes Afghanistan, a key actor to solve the water issues of the region (see Chapters 4 and 7). Broadening the engagement to involve Afghanistan while building trust among the six countries is a prerequisite to facilitate cooperation on water issues. Moreover, a sustainable and efficient use of water resources could ultimately help to mitigate border disputes between Kyrgyzstan and Tajikistan. It might also assist in strengthening confidence between the two parties and resolve previous disagreements.¹⁸⁰

Another platform for cooperation is the International Fund for Saving the Aral Sea (IFAS). Although it is a unique forum, it currently does not guarantee sufficient cooperation to reach its goal. The organisation has the potential to be reformed to expand cooperation in transboundary water management as well as energy connectivity. One of the problems in its operations, however, is that the IFAS head and secretariat rotate whenever the chairmanship rotates. So, whenever there is a new chair, the organisation needs to start again from scratch. To solve this issue, Central Asian states agree that the secretariat must reside in a set location and maintain an international non-rotating staff. Although this solution is supported, the exact location remains undecided.

Water management: Dutch expertise

Among the EU Member States, the Netherlands is a recognized world leader in water management and is interested in sharing its experience with the region. In 2023, for instance, the Netherlands and Tajikistan jointly hosted the UN Water Conference.¹⁸¹ Moreover, in May 2024, during the visit of the former Dutch Prime Minister Mark Rutte to Kazakhstan, the Netherlands signed two MoU's with the Ministry of Water Resources and Irrigation of Kazakhstan aimed at strengthening water cooperation and facilitating research, innovation, and education.

178 [‘Global Gateway: Team Europe Launches Two Initiatives in Central Asia on Energy and on Digital Connectivity’](#), European Commission, 18 November 2022.

179 Ibid.

180 Fabio Indeo, [‘Uzbekistan and Tajikistan, a Strategic Cooperation in the Heart of Central Asia’](#), Nato Defense College Foundation, 30 April 2024.

181 [‘UN 2023 Water Conference’](#), Ministry of Foreign Affairs, accessed on 13 December 2024.

On top of the exchange of experience in the regulation and use of floodwaters, the Netherlands pledged to provide training for specialists together with the IHE Delft Institute for Water Education.¹⁸² Although the Netherlands is involved in the Team Europe Initiative on Water, Energy, and Climate Change, little to no publicity has been given to its participation. For example, the Netherlands is not listed as a participant on the EU Capacity4dev website for the initiative,¹⁸³ nor is it mentioned in other related publications. Further collaboration in this initiative presents an opportunity to join forces with other European partners, such as Finland, France, Germany, and Italy. With the high reputation of European universities, more initiatives aimed at exchanging innovative technology and effective good governance can be leveraged by Europe as a worthy entry point in the region.

Agriculture

Agriculture is a crucial economic sector for the countries in Central Asia in terms of output and employment. In 2019, data from the ADB show that agriculture accounted for 25.5% of the gross domestic product (GDP) in Uzbekistan, 19.2% in Tajikistan and 12.1% in Kyrgyzstan.¹⁸⁴ This sector faces growing challenges driven by changing climates and unpredictable market conditions. Water availability is a key issue, as well as the inefficient use thereof and the cultivation of water-thirsty crops such as cotton. The countries of the region are already struggling to secure water for agricultural production (see Chapter 4). Without a proper management of water resources, water levels are expected to decline, leading to more competition over limited resources.¹⁸⁵

At the market level, unfair competition spurred by heavy subsidies and high import duties hinder the export competitiveness of agricultural products.¹⁸⁶ Wheat, for instance, is the main agricultural product and the most important

182 Wilder Alejandro Sánchez, '[Kazakhstan Partners with Netherlands and France to Tackle Water Issues](#)', *The Astana Times*, 6 June 2024.

183 '[Water-Energy-Climate Change in Central Asia](#)', Capacity4dev, accessed on 13 December 2024.

184 Dorothea Lazaro et al., '[Expanding Agri-Trade in Central Asia through the Use of Electronic Certificates](#)', Asian Development Bank, July 2021.

185 Lazaro et al., '[Expanding Agri-Trade in Central Asia through the Use of Electronic Certificates](#)'.

186 '[National Business Agenda Fiscal Policy and Access to Finance Kyrgyz Republic Executive Summary](#)', Center for International Private Enterprise (CIPE), 2024.

for regional food security. In fact, it has historically been subject to heavy state intervention and land allocation.¹⁸⁷ Competition over the same products is a challenge among Central Asian countries which demands a targeted market research and division of crops based on competitive advantage. This would facilitate a more cohesive market where each country specializes in and exports specific crops, thereby leveraging the agricultural potential of the region.

In Central Asia, there is an interest in developing an industry of agricultural production and exports to Europe, such as by developing a food packaging industry as well as implementing standardisation and certification. Increasing the shares of processed agricultural products would also contribute to strengthening food security in the region. To achieve this, the countries want to learn and attract modern agricultural techniques and technologies, such as greenhouses. According to the World Bank, this would increase the region's crop yields by over 20% by 2030, and by 50% by 2050.¹⁸⁸

The EU has an interest in facilitating agricultural trade and contributing to Central Asian countries' export diversification and sustainable growth. It is also perceived as a reliable actor with technical expertise and advanced technology. Historically, agriculture has been one of the most important sectors for the relationship between the Netherlands and Central Asian countries, as signalled by the presence of a Dutch Agriculture Attaché at the embassy in Astana, as well as early Dutch involvement in agricultural projects in Kazakhstan, Kyrgyzstan, and Uzbekistan.

The Netherlands is the third largest exporter of agricultural produce in the world, accounting for 5.4% of world production, and is considered to be a technological leader in sustainable agriculture, greenhouses and seeds.¹⁸⁹ This makes the Netherlands a natural partner for Central Asian countries as it could transfer its agri-tech and provide technical assistance to improve the resilience of crops for export. Dutch universities, such as Wageningen University, are internationally recognised in agricultural sciences and are appealing to Central Asian students

187 ['Agriculture Development in the Central Asia Regional Economic Cooperation Program Member Countries: Review of Trends, Challenges, and Opportunities'](#), Asian Development Bank, 31 December 2019.

188 ['No More Business as Usual: Improving Water Usage in Central Asia'](#), World Bank, 28 June 2019.

189 ['The Netherlands: The Third-Largest Agricultural Products Exporter, but with a 0.4% Production Share'](#), Fresh Plaza, 16 February 2024.

who would benefit from more exchange programmes or collaborations with local universities. Moreover, Central Asian countries need to abide by European standards to be able to export to the EU market and require training with regard to relevant EU regulations.

Connectivity and trade

From the second century BCE until the mid-15th century, Central Asia was at the centre of the Silk Road that connected China to the Middle East and Europe. But as trade between Asia and Europe moved to the Ocean Route, and later to the Northern Corridor via Russia, Central Asia lost its key trading position.¹⁹⁰

Recently, the region has regained its relevance for global trade routes and found itself in the spotlight once again. Since the Russian full-scale invasion of Ukraine, in fact, there is growing attention to the Trans-Caspian International Transport Route (TITR) – or the Middle Corridor – as an alternative trade route linking China to the EU via Kazakhstan, Azerbaijan, Georgia, and Türkiye. Cargo transport volumes along this route had already increased by 88% in 2023.¹⁹¹

For the region, the TITR could be an opportunity to diversify trade markets and to expand the export range of products and services while spurring job creation. Currently, countries in Central Asia are among the least connected in the world.¹⁹² Boosting connectivity is a priority for them as well as for the EU, which prioritizes the development of “functioning trade corridors” between Central Asia and Europe while “ensuring that connectivity develops in a sustainable, open, inclusive and rules-based way (...), creating a suitable environment for sustainable investment and a level playing field”.¹⁹³

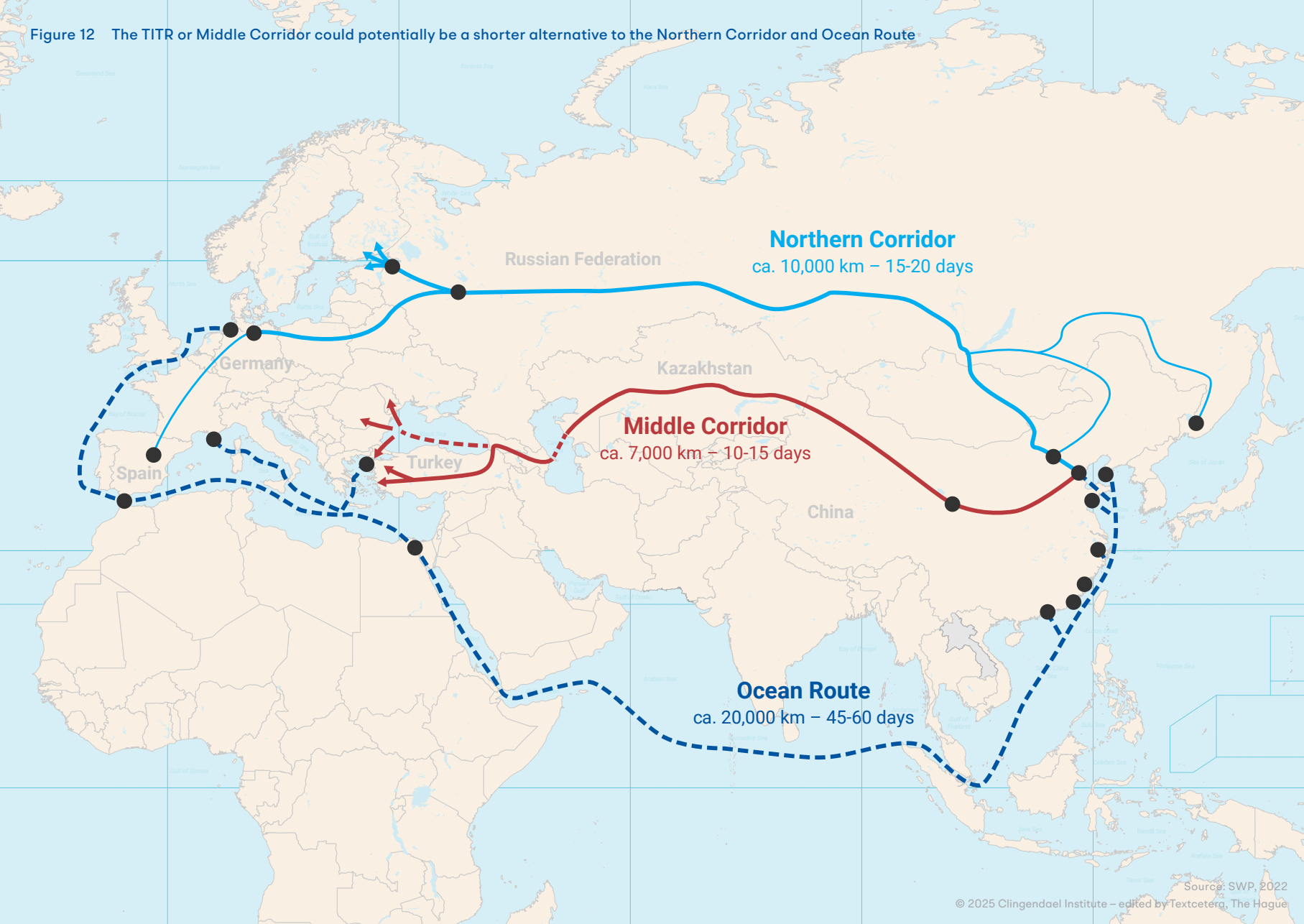
190 [‘Agriculture and Horticulture’](#), Ministry of Agriculture, Fisheries, Food Security and Nature, accessed on 2 December 2024.

191 Assel Satubaldina, [‘Cargo Transportation Along Middle Corridor Soars 88%, Reaches 2 Million Tons in 2023’](#), *The Astana Times*, 28 December 2023.

192 [‘Improving Transport Connectivity in Central Asia Requires a Coherent Approach’](#), World Bank, 2 April 2021.

193 High Representative of the Union for Foreign Affairs and Security Policy, [‘The EU and Central Asia: New Opportunities for a Stronger Partnership’](#).

Figure 12 The TITR or Middle Corridor could potentially be a shorter alternative to the Northern Corridor and Ocean Route



Yet, Central Asian countries diverge on their preferred transport route. While some prioritise the east-west connection, others prefer the north-south route.

Kazakhstan is politically invested in realising the TITR. In November 2022, Kazakhstan signed a Roadmap together with Azerbaijan, Georgia, and Türkiye listing priority investments.¹⁹⁴ Being a key transit country, it would greatly benefit from this project and realize its ambition to become a transport hub between Europe and Asia, while increasing its exports.¹⁹⁵ Moreover, the government sees it as a prospect to spur intraregional trade and facilitate the economic integration of Central Asia. Turkmenistan is also interested in the TITR but is less involved. Ashgabat is careful with balancing the need to expand export opportunities with its relations with Moscow, which is incentivizing Central Asian countries not to go towards Europe.

Concerns revolve around the long-term feasibility of the project, especially when the war in Ukraine will be over, and the question of who is going to pay for the infrastructure. Moreover, building a pipeline in the Caspian Sea seems difficult as Russia could veto the proposal, as happened with the Trans-Caspian gas pipeline, which was objected to on environmental grounds.¹⁹⁶ And Turkmenistan is currently focussed on building the Turkmenistan-Afghanistan-Pakistan-India (TAPI) pipeline.¹⁹⁷

For Uzbekistan, Kyrgyzstan and Tajikistan, the TITR is considered to bring few opportunities to boost their exports. Their priority for connectivity lies in the north-south corridors towards Pakistan via the Trans-Afghan railway and towards Iran, allowing access to the open sea.¹⁹⁸ These corridors would open new opportunities for the region to trade with South Asia and the Middle East, and are favoured by Moscow. The EU is invested in supporting the operationalisation of the TITR as it has a strategic interest in diversifying away from the Northern

194 [‘Ministers of Four States Discussed the Development of TITM’](#), Trans-Caspian International Transport Route, 25 November 2022.

195 Wilder Alejandro Sánchez, [‘Kazakhstan’s Uranium Industry and the Middle Corridor Come Together’](#), *The Diplomat*, 30 January 2023.

196 Yana Zabanova et al., [‘EU-Kazakhstan Green Hydrogen Partnership: Mapping Barriers and Establishing a Roadmap’](#), EPICO KlimalInnovation and Konrad Adenauer Stiftung, 2023.

197 Syed Fazl-e-Haider, [‘Turkmenistan Resumes Work on TAPI Pipeline Despite Geopolitical Hurdles’](#), The Jamestown Foundation, 19 September 2024.

198 Sophia Nina Burna-Asefi, [‘After Temporary Suspension, What’s Next for the Trans-Afghan Railway?’](#), *The Diplomat*, 17 February 2023.

corridor. Yet, the TITR could indirectly allow Moscow to further circumvent sanctions through Central Asian economies – something the EU is already highly concerned about.

Moreover, the TITR could reinforce China's economic engagement and influence in the region, and could potentially increase the leverage of states along the TITR over the EU. Nevertheless, the benefits of deepening EU connections with Central Asia outweigh these risks. By providing regional connectivity opportunities, the EU could, in fact, position itself as a key player in the region and boost trade in energy, critical raw materials and agricultural products, among others.¹⁹⁹

The EU has committed to raise 10 billion euros for TITR infrastructure investment as part of the Global Gateway. Moreover, it has announced an EU-funded Regional Transport Programme for 2025 to offer technical assistance.²⁰⁰ Know-how and best practices on developing and managing ports are needed. The Netherlands is well placed to offer technical assistance because of its experience with the Port of Rotterdam, the biggest in Europe.

To maximise the benefits of the TITR, challenges related to both soft and hard infrastructure need to be addressed. The EBRD estimates that a cost of 18.5 billion euros is required to operationalise the corridor, demanding a mobilisation of both public and private capital to modernise port and railway infrastructure.²⁰¹ Moreover, there is a need to improve coordination and operational efficiency along the route to build trade potential. This requires establishing a cross-border institutional framework, harmonising trade standards and simplifying border procedures. Digitalisation is a key element that would enable greater transparency and efficiency.²⁰²

To expand the benefits of the TITR for the region, the EU could offer broader economic engagement allowing countries to participate in European value chains. This includes offering “favourable access to the EU market, through the

199 Alberto Rizzi, '[Risk and Reward: Why the EU Should Develop the Middle Corridor Trade Route](#)', ECFR, 11 April 2024.

200 '[Key Outcomes of the Global Gateway Investors Forum for EU-Central Asia Transport Connectivity](#)', Global Gateway, 30 January 2024.

201 '[Sustainable Transport Connections between Europe and Central Asia](#)', European Bank for Reconstruction and Development (EBRD), 16 June 2023.

202 'Improving Transport Connectivity in Central Asia Requires a Coherent Approach'.

Generalised Scheme of Preferences (GSP) or GSP+”.²⁰³ Currently, Kazakhstan, Kyrgyzstan and Uzbekistan are beneficiaries while Tajikistan is negotiating this.²⁰⁴ Moreover, support aimed at improving regulatory frameworks and business climate is key to attract private sector investments. Finally, on digital connectivity, the EU launched a Team Europe Initiative of 40 million euros to provide technical assistance for “the development of the countries’ governance in sectors including telecoms reform, cybersecurity, and personal data protection”.²⁰⁵

Education

In terms of people-to-people connectivity, a key priority for the EU in Central Asia is education. This has been the case since the first EU strategy for the region, which states that “Central Asia’s future will be shaped by its young people”.²⁰⁶

EU education policy towards Central Asia is primarily carried out through the Erasmus+ programme, which aims to improve the level of university education in the region. It does so by assisting universities to modernise in accordance with the Bologna process on higher education, as well as the Torino principles on vocational education and training.²⁰⁷ Another more visible aspect of Erasmus+ is its exchange programmes. Between 2015 and 2019, there were 5,053 Central Asian students who studied in the EU and 2,342 students the other way around.²⁰⁸ And to get Central Asian universities more involved in Erasmus, the EU used to have a regional education initiative for Central Asia.

Education is a clear example of an area in which all five Central Asian partners are interested in cooperating more closely with the EU. They would like to strengthen the ties between Central Asian universities and their European counterparts, for example by cooperating in research and organising more student exchange programmes. The high level of education in the EU is one of

203 Shreeves, Delivorias, and Caprile, ‘The EU Strategy on Central Asia: Towards a New Momentum?’.

204 ‘[EU Trade Relations with Central Asia](#)’, European Commission, accessed on 8 December 2024.

205 ‘Global Gateway: Team Europe Launches Two Initiatives in Central Asia on Energy and on Digital Connectivity’.

206 The Permanent Representatives Committee, ‘The EU and Central Asia: Strategy for a New Partnership’.

207 ‘[The EU Development Priorities in Central Asia](#)’, EEAS, 16 March 2022.

208 ‘[EU-Central Asia Academic Cooperation through Erasmus+](#)’, European Commission, January 2020.

the valuable aspects the Union has to offer to the countries of Central Asia and would be very much in demand among students in the region.

This opens up possibilities for the EU to play a bigger role in Central Asia, which would also bring a strong positive impact on energy security and transition, water management, agriculture, and the other key sectors for cooperation as outlined in this report.

In practice, however, education has so far proved to be a challenging topic. While it has been on the agenda for a long time, the results of EU education assistance towards the region have been assessed as “below expectations, at times controversial, and has lacked visibility”.²⁰⁹

Various issues are at play, such as the generic approach of the EU in education assistance while Central Asia is a diverse region and differences between the five countries should be taken into account – from the cultures to histories, political systems, and more. Another issue is an underestimation of the “authoritarian and corrupt political context” of the region, which leads to diverging perspectives on the skills that should be promoted in higher education. For example, the Central Asian authorities tend not to be inclined to promote skills like critical thinking, which are labelled as “Western ideas”.²¹⁰

The fundamental reforms in education that the EU is envisioning for the region at large, such as getting higher education in Central Asia in line with the Bologna process, are not effective due to such challenges. Observers have assessed that the EU should rather work more directly with targeted, nationally-oriented smaller projects.²¹¹ Here one can think of internship programmes for Central Asian students at European companies or fellowship programmes in European countries for young Central Asian civil servants or civil society representatives.

Finally, the EU education focus in the region is very much on higher education. While this is good as a starting point, EU engagement can be just as important and needed in primary and secondary education.²¹² After all, without access to proper

209 Sebastien Peyrouse, ‘[Reconsidering EU Education Assistance to Central Asia](#)’, EUCAM, 25 June 2019.

210 Ibid.

211 Ibid.

212 Cornell and Starr, *A Steady Hand*.

primary and secondary education, young people in Central Asia cannot enter higher education that the EU is currently focussing on.²¹³

Regional security

The countries of Central Asia face various shared security threats, such as terrorism, drug trafficking, extremism, radicalisation, and illegal migration. In line with this, making the region more secure and resilient is one of the longer-standing priorities of the EU in Central Asia.

The BOMCA programme for border management, mentioned in Chapter 9, is a practical example of these efforts. It is one of the “biggest and most successful EU flagship-projects” in the region.²¹⁴ Currently in its tenth phase since 2003 with a budget of over twenty million euros, BOMCA has the overall goal to increase the effectiveness and efficiency of border management in Central Asia and thereby to contribute to national and regional security and economic development.²¹⁵

A second project through which the EU aims to make Central Asia more secure is the also aforementioned CADAP (see Chapter 9), which launched in 2003 and aims to help the countries of the region in lowering the demand for drugs, supporting preventative programmes, and enhancing the care that local drug users receive from public institutions.²¹⁶ The EU is interested in further cooperating with Central Asian states to combat organised crime, migrant smuggling, human trafficking, and illegal drug trafficking.²¹⁷ One programme that focuses on tackling transnational organised crime is the EU Action Against Drugs and Organised Crime (EU-ACT II), which is carried out by member states’ law enforcement authorities.²¹⁸

213 Peyrouse, ‘Reconsidering EU Education Assistance to Central Asia’.

214 Ildar Daminov, ‘EU-Central Asian Cooperation on Border Management, Migration and Mobility’, in *Europe-Central Asia Relations: New Connectivity Frameworks*, ed. Kashif Hasan Khan and Anja Mihr (Singapore: Springer Nature, 2023), 249–70.

215 ‘Background’, BOMCA 10, accessed on 12 October 2024.

216 ‘Central Asia Drug Action Programme (CADAP)’, CADAP, accessed 12 October 2024.

217 High Representative of the Union for Foreign Affairs and Security Policy, ‘The EU and Central Asia: New Opportunities for a Stronger Partnership’.

218 ‘EU-ACT II’, *Global Illicit Flows Programme*, accessed on 3 December 2024.

The EU also funds the Law Enforcement in Central Asia (LEICA) project, which aims to aid Central Asian law enforcement agencies in combating terrorism in the region. This is done through strategic and operational exchanges between EU and Central Asian law enforcement, capacity building, and regional cooperation to combat terrorism-related problems.²¹⁹

Through these programmes, the EU has had a positive effect on the border management systems and security in Central Asia. It has improved legislation in individual countries such as Kazakhstan and Tajikistan, for example, and in general has helped to better regulate and stabilize migration flows.²²⁰

Yet, there are several challenges regarding EU security projects in the region. One of these is that Central Asian governments tend to overstretch risks of radicalism and religious extremism in order to gain support.²²¹ Observers note that Central Asian governments consider radical Islam as one of the biggest security threats to their countries and the power of their regime, which causes them to be more repressive and crack down on religious movements in particular. While the fear of radicalization is legitimate, the EU should be aware of these underlying motivations and also focus on long-term, preventative measures against radicalization and marginalization that focus on root causes – improving the social-economic perspectives of the people of the region.²²² One such project undertaken by the EU in the past is its engagement with Kyrgyz civil society through the Strengthening Resilience to Violent Extremism (STRIVE) programme.²²³

While the EU is not willing to be a hard security actor in Central Asia, the EU and Central Asia's shared security threats do offer a potential avenue for cooperation. The EU-Central Asia High-level Political and Security Dialogue meets regularly, most recently in June of last year in Brussels, for example, to discuss the security challenges that both the EU and Central Asia are dealing

219 ['About'](#), Project Leica, accessed on 3 December 2024.

220 Daminov, 'EU-Central Asian Cooperation on Border Management, Migration and Mobility'.

221 Bob Deen, ['De Lokroep van het Kalifaat Wordt ook in Centraal-Azië Gehoord'](#), Platform RAAM, 2 May 2017.

222 Ibid.

223 Chiara Pierobon, ['EU Efforts to Prevent Violent Extremism \(PVE\) by Engaging Civil Society in Kyrgyzstan'](#), *Central Asian Affairs* 8, No. 2 (13 October 2021): 150-74.

with.²²⁴ More recently, the EU and the Netherlands organised a roundtable in Astana to address critical transnational threats that impact both the EU and Kazakhstan.²²⁵

Human rights, democracy, and the rule of law

One of the longer-standing interests of the EU in Central Asia is the promotion of human rights and democracy. In its latest strategy for the region, the EU argues that taking steps such as advancing the rule of law, bolstering the accountability of public institutions, and guaranteeing respect for human rights are “key conditions for the success of the sustainable development of Central Asia”.²²⁶

Moreover, these efforts are aimed at helping to attract foreign investments in Central Asia. The business climate in all countries of the region requires improvement and some European companies are hesitant to invest and transfer their technologies in this regard. In Tajikistan, for instance, predatory taxation, widespread corruption, and the state monopolisation of the market do not provide the right incentives to foreign investors. In fact, the Central Asian countries understand the need to strengthen their legal frameworks and make their business climates more transparent and predictable to attract investments from European companies.²²⁷

To bolster human rights, democracy, and the rule of law in Central Asia, the EU supports governments in enhancing their legal capabilities and to reform their judicial and legal systems.²²⁸ Another pathway is the annual EU – Central Asia Civil Society Forum, where a wide variety of civil society representatives of both regions are brought together to explore ways to become more involved in the local implementation of the EU Central Asia Strategy.²²⁹

224 [‘EU-Central Asia: 11th High-Level Political and Security Dialogue Held in Brussels’](#), EEAS, 5 June 2024; High Representative of the Union for Foreign Affairs and Security Policy, ‘The EU and Central Asia: New Opportunities for a Stronger Partnership’.

225 [‘Astana Hosted a Roundtable on Transnational Threats Affecting the EU and Kazakhstan’](#), EEAS, 15 November 2024.

226 High Representative of the Union for Foreign Affairs and Security Policy, ‘The EU and Central Asia: New Opportunities for a Stronger Partnership’.

227 Cretti and van Schaik, ‘Resource Curse or Darling’, Clingendael.

228 ‘EU-Central Asia Relations’.

229 [‘Central Asia’](#), EEAS, 25 March 2022.

However, even though this topic is still a priority for the EU in theory, this no longer seems to be the case in practice. Today, the talk of the town in Brussels is all about energy and trade – not human rights and democracy. Stability in Central Asia is valued more highly than democracy, and so the European Union maintains cordial ties with the Central Asian governments in spite of their autocratic style of governance and regular human rights abuses.²³⁰

Tensions over EU democracy promotion or defence of human rights are not new. The EU's strategy towards Central Asia was, in practice, marked by a significant disconnect between the highly normative language of the EU and the rather self-interested actions back then, as observers noted: “democracy promotion was one of the top priority areas according to the EU Strategy towards Central Asia, but its implementation was characterized by a lack of effort and inconsistency”.²³¹ Amongst Kazakh elites, there are mixed feelings about this normative agenda of the EU. While most opinion influencers in Kazakhstan tend to widely recognise European values, others oppose the political and cultural aspects of these values.²³²

The current EU approach towards the region can be described as “principled pragmatism”, as outlined in the Global Strategy for the European Union's Foreign and Security Policy in 2016.²³³ Whereas the EU is still guided by its long-term principles, it acts more pragmatically and accepts partners for what they are. In practice, this means the EU is balancing its principles and interests in Central Asia, which “has often come at the cost of human rights abuses and the consolidation of undemocratic regimes.”²³⁴

There used to be a lot of tensions and misunderstandings over values between the EU and the countries of Central Asia, but about a decade ago the governments of the region started to accept EU criticism while business was ongoing. More recently, the EU has in turn become more silent on human rights,

230 Jos Boonstra, [‘EU-Central Asia Connectivity: Using All the Pieces’](#), EUCAM, October 2024.

231 Aizhan Sharshenova, [‘European Union Democracy Promotion in Central Asia’](#), (PhD diss., University of Leeds, 2015).

232 Zhanibek Arynov, [“‘Nobody Goes to Another Monastery with Their Own Charter’: The EU’s Promotion of “European Values” as Perceived in Central Asia’](#), *Europe-Asia Studies* 74, No. 6 (2022): 1028–50.

233 [‘A Global Strategy for the European Union’s Foreign and Security Policy’](#), EEAS, 15 December 2019.

234 Sharshenova, [‘European Union Democracy Promotion in Central Asia’](#).

democracy and the rule of law due to their renewed energy and trade interests. The granting of a new EPCA to Kyrgyzstan even though the country has clearly been moving into an authoritarian direction is a clear example of this.²³⁵

This leads to confusion amongst Central Asian partners. On the one hand, people in Central Asia who are fighting for democracy, human rights and the rule of law feel betrayed, while on the other hand, Central Asian governments realise that, apparently, these important values are no longer so important for the EU when economic and security interests come into play.²³⁶

When taking steps towards deepening the EU-Central Asia relationship, the EU should consider to increasingly do good governance and rule of law projects with Central Asia that are directly connected to energy (security) and other areas in which the countries of the region want to cooperate. Central Asian partners are formally still committed to the Organization for Security and Co-operation in Europe (OSCE) human dimension, and these OSCE commitments could be a framework for doing so.

Regional cooperation

Central Asian countries face many challenges that are regional in nature, yet the countries are not ready to face them as a region. There is not enough trust among governments to share data about their water flows, for instance. In fact, building trust by bringing countries together in dialogues is a key step toward greater regionalisation.

Now there is more appetite among the countries of Central Asia to boost regional cooperation. Leaders understand that if they work as a region, they can pool their markets together and become more attractive to foreign investors. At the same time, they can reduce dependencies on third countries, like Russia. In areas such

²³⁵ 'Kyrgyz Republic: Signing of Enhanced Partnership and Cooperation Agreement (EPCA) with the European Union, EEAS', 25 June 2024; Bruce Pannier, 'Kyrgyzstan: Central Asia's Island of Democracy Sinks Into Authoritarianism', Foreign Policy Research Institute, 12 April 2024.

²³⁶ Kluczevska and Dzhuraev, 'The EU and Central Asia'.

as energy, water and agriculture there is a huge potential to share resources and increase trade with third countries.²³⁷

Strengthening regional cooperation within Central Asia is one of the key objectives for the EU, based on rules-based cooperation. The EU argues that this will allow Central Asian states to better manage their interdependencies, strengthen their economic position and international influence, and uphold their identity and independence, amongst other things.²³⁸

One aspect of this is strengthening the Central Asian economies “to address the structural constraints which still limit the potential for trade and investment between the EU and Central Asia”, according to the EU strategy for Central Asia.²³⁹ To achieve this, the EU aims to foster an open investment environment as well as a competitive private sector in the region. The EU supports the economic modernisation of the region and the integration of Central Asia into the international markets, of which accession to the World Trade Organisation is an element.²⁴⁰

During various of our interviews, interviewees noted that there is first a need for Central Asian countries to build a regional identity in order to cooperate better.²⁴¹ However, this is challenging because the five countries are not homogeneous amongst each other and neither fully homogenous within. Although there are shared elements in their history, religions, cultures, and worldviews that Central Asian countries could use to build such regional identity,²⁴² one may wonder if this is really a prerequisite for cooperation. The EU does not have a fully developed European identity either and neither did the European Coal and Steel Community, or other regional formats that could be an example for Central Asia, such as the Benelux cooperation between Belgium, the Netherlands, and Luxembourg.

237 Nargis Kassenova, ‘[Strategic Autonomy for Central Asia: Drawing inspiration and support from the European Union](#)’, CAPSunlock, 28 June 2023.

238 High Representative of the Union for Foreign Affairs and Security Policy, ‘The EU and Central Asia: New Opportunities for a Stronger Partnership’.

239 Ibid.

240 ‘EU-Central Asia Relations’.

241 Interviews in Astana, Bishkek, Dushanbe, and Tashkent, April – May 2024.

242 Mirshohid Aslanov and Alouddin Komilov, ‘[Central Asia: The Once and Future Heart of Eurasia](#)’, *Geopolitical Monitor*, 3 July 2024.

Although the EU supports regionalisation in Central Asia and is considered to be a model for this as well, the region has a different history and socio-economic situation which demands a targeted approach to regionalisation based on local needs. For instance, formal institutionalisation is not seen as a “must” for Central Asian countries, where personal relationships are more crucial than institutions.²⁴³ While the EU, with its extensive experience in fostering cooperation among countries with diverse cultures and histories, is a natural partner to support regionalisation, the success of regional integration in Central Asia ultimately hinges on the initiative and commitment of the Central Asian states. More dialogue aimed at building trust among the five countries as well as technical exchanges on best regional practices could be beneficial.

243 Costa Buranelli, 'Central Asian Regionalism or Central Asian Order?'

11 Conclusions and recommendations

The Russian full-scale invasion of Ukraine in 2022 has reignited the EU's interest in Central Asia. Meanwhile, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan are emerging from the shadows and boldly diversifying their international relations.

This takes place in a quickly evolving geopolitical context. The relations between the states of the region have much improved over the past years, yet the availability of water and energy resources provides a challenge for cooperation. Russia can be considered a systemic factor in Central Asia, and China has increasingly taken on a leadership role in the region over the past two decades as well. After the US withdrawal from Afghanistan, the states of Central Asia have re-established their relations with the Taliban. And many other parties show an interest in cooperating with Central Asia as well, such as Türkiye and Azerbaijan, Iran, and the Arab Gulf states.

While taking stock of these dynamics, the EU and the Netherlands in particular can also play a bigger role in the region. This is in line with the EU's objective to become more of a geopolitical player worldwide. Yet if the EU is serious about this, it should substantiate its ambition through tangible and deeper engagement in a wide range of sectors that goes beyond energy and trade. In Central Asia, the EU and Netherlands in particular have a unique entry point to the region in the fields of energy security and transition, water management, agriculture, connectivity, regional security, human rights, democracy the rule of law, and regionalisation.

Towards further strengthening EU – Central Asia relations in a mutually beneficial way, this report makes the following recommendations:

Improve the positive presence of the European Union in Central Asia

- Showcase the long-term commitment of the EU to Central Asia by deepening the bilateral relationship in the above-mentioned areas. While the European

political attention for Central Asia has experienced its ups and downs over the years, various EU projects and serious investments have been there consistently and should be further built upon.

- Organising the EU-Central Asia Summit should receive a higher priority from the EU. While this first formal summit was supposed to take place in 2024, a concrete date is still missing at the time of writing. The summit needs to be an EU priority for 2025 while simultaneously continuing to organise high-level visits to and from Central Asia.
- Many EU member states, such as the Netherlands, tend to only have an embassy in Kazakhstan and should increase their presence in other countries of the region as well. First and foremost in Uzbekistan, the demographic powerhouse of the region and centrally located – bordering all other states of Central Asia. Opening an embassy office in Tashkent could be a first step toward ideally opening a fully-fledged embassy in the future.
- Central Asian countries should also strengthen their presence and visibility in the EU, although this is rather a recommendation for the Central Asian governments. For many Europeans, Central Asia is still a vague and far-away region about which they know very little. Tourism promotion could be a key opportunity for changing this. If the EU and Central Asia wish to seriously strengthen their relations, they also need to make their regions and initiatives more tangible for both.

Focus on concrete projects that offer opportunities in a wide range of sectors

- Taking stock of the geopolitical context of the region, the EU does not need to compete with Russia or China in Central Asia as this will be a losing battle anyway – if only due to geography. Instead of becoming sucked into a geopolitical arm-wrestling game with parties that are far more skilled and dishonest therein, the EU should act more geopolitical by increasing its cooperation with Central Asia through concrete projects in a wide range of sectors.
- To mobilise public and private finance and de-risk investments, the European Commission and the EU Delegation to Kazakhstan could facilitate the launching of a Team Europe Initiative on green hydrogen with Kazakhstan, as

suggested in earlier Clingendael work.²⁴⁴ By combining the various projects funded by EU member states like Germany, France and the Netherlands, the EU can step up its engagement and become a valuable partner in green hydrogen.

- Regarding other Team Europe Initiatives, the Netherlands in particular should consider collaborating more in the one on Water, Energy and Climate Change. This Initiative offers an opportunity to join forces in (in particular) water projects with other European partners such as Finland, France, Germany, and Italy. Currently, little to no publicity is given to the Dutch participation in the Initiative, even though the Netherlands is an active partner for water, energy and climate change related projects in Central Asia.
- The Netherlands should consider extending the Matra Grant Policy Framework²⁴⁵ to its embassy in Astana, for all five countries of Central Asia. This would allow the Netherlands to more substantially engage with projects in the region.
- When taking steps towards a further deepening of the EU–Central Asia relationship, the EU should consider connecting this to doing more governance and rule of law projects with Central Asia. These should be directly connected to energy (security) and other areas in which the countries of the region want to cooperate. As Central Asian partners are formally still committed to the OSCE human dimension, which encompasses human rights and democracy norms, these OSCE commitments could be a framework for doing so. After all, these norms and values are what makes the EU unique compared to other actors.

Take stock of further opportunities

- In setting out a long-term vision for cooperation with Central Asia, projects with the youth are a best practice. This is in particular the case with projects related to human rights and democracy, as this makes it easier to convince the authorities: who doesn't want to work on a brighter future for the next generation?

²⁴⁴ Cretti and van Schaik, 'Resource Curse or Darling'.

²⁴⁵ Government of the Netherlands, '[NFRP/Matra: Grants for strengthening democracy and the rule of law in Europe](#)', accessed on 19 December 2024.

- The EU needs to further stimulate exchange programmes between European and Central Asian universities. Initiatives such as Erasmus+ and the combined Erasmus Mundus master's programme with KIMEP University in Almaty are fitting examples, but are still rather limited compared to the wide array of opportunities that Russia and China offer to students of the region.
- It would also be worthwhile for the EU to stimulate exchanges within Central Asia, so that Central Asian students meet in their own region as well instead of in Moscow or Beijing. Exchange programmes between Central Asian universities, possibly in partnership with their European counterparts, further strengthen the regionalisation of Central Asia.
- The EU should consider going beyond investing in higher education in Central Asia and invest in strengthening primary and secondary education as well, which is just as important and needed. Without access to proper schooling, young people cannot enter higher education that is currently the primary focus of the EU.

Annex 1 Methodology of the geopolitical mapping

Methodology

This geopolitical landscape map assesses the relative importance of each of the actors, as well as the relations between them. It does so by providing quantitative scores to both the relevance of the actors and the strength of their relationships, as well as by giving a qualitative assessment of the relationships themselves.

Actors are ranked according to their regional influence in Central Asia, i.e., not their power as a whole, using the following scores:

4: The five states of Central Asia;

3: Regional powers with major influence over events;

2: Individual countries with particular interests or ties with specific countries;

1: Distant powers with limited interests.

For the purpose of this exercise, the European Union is taken as a single actor, although individual member states (such as Germany) also have a degree of 'actorness' themselves.

Relations between the actors are characterized as 'good', 'bad' or 'ambiguous'. They are scored according to the intensity of the relationship, as follows:

5: Direct or indirect military confrontation or alliance;

4: Strong political, economic, or military support, but no direct involvement;

3: Significant level of interaction (confrontation or support) but no security assistance;

2: Low level of engagement, no military or economic support;

1: Lack of relations.

The relations are scored according to the extent that *they influence geopolitics in Central Asia, not on world politics as a whole*; i.e., the US and Russia or the US and China have a much broader range of relationships that are not included in this exercise. The following table underpins the interactive geopolitical landscape map visualised in Kumu:

From	To	Type	Strength
Afghanistan	United States	Bad	1
Afghanistan	Kazakhstan	Good	2
Afghanistan	European Union	Ambiguous	1
Afghanistan	Uzbekistan	Ambiguous	2
Afghanistan	Tajikistan	Ambiguous	2
Azerbaijan	Kazakhstan	Good	4
China	Tajikistan	Good	4
China	Kyrgyzstan	Good	4
China	Uzbekistan	Good	4
China	Kazakhstan	Good	4
China	Turkmenistan	Ambiguous	3
China	India	Ambiguous	4
European Union	Tajikistan	Good	3
European Union	Turkmenistan	Good	2
European Union	Russia	Bad	4
European Union	China	Ambiguous	4
European Union	Kyrgyzstan	Good	2
European Union	Kazakhstan	Good	4
European Union	Uzbekistan	Good	3
European Union	Germany	Good	5
Germany	Kazakhstan	Good	4
India	Kazakhstan	Good	2
Iran	Saudi Arabia	Bad	4
Iran	Russia	Good	3
Kazakhstan	Tajikistan	Good	4
Kazakhstan	Turkmenistan	Good	3
Kyrgyzstan	Kazakhstan	Ambiguous	3
Pakistan	India	Bad	4
Russia	Kazakhstan	Good	5

From	To	Type	Strength
Russia	China	Good	4
Russia	Kyrgyzstan	Good	5
Russia	Uzbekistan	Good	4
Russia	Tajikistan	Good	5
Russia	Turkmenistan	Good	3
Saudi Arabia	Kazakhstan	Good	2
Saudi Arabia	Uzbekistan	Good	2
Tajikistan	Kyrgyzstan	Ambiguous	4
Tajikistan	Iran	Good	3
Türkiye	Turkmenistan	Good	3
Türkiye	Kyrgyzstan	Good	3
Türkiye	Azerbaijan	Good	5
Türkiye	Uzbekistan	Good	3
Türkiye	Kazakhstan	Good	3
Turkmenistan	Tajikistan	Good	3
Turkmenistan	Kyrgyzstan	Good	3
United States	European Union	Good	5
United States	Kazakhstan	Good	3
United States	Uzbekistan	Good	3
United States	Kazakhstan	Good	3
United States	Russia	Bad	4
United States	China	Ambiguous	4
Uzbekistan	Kazakhstan	Good	4
Uzbekistan	Turkmenistan	Good	3
Uzbekistan	Kyrgyzstan	Ambiguous	3
Uzbekistan	Tajikistan	Good	3