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*Russia's potential approach in its Central Asian
'near abroad': toward a transferable modus operandi
derived from Ukraine ?*

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Introduction

On 3rd and 4th April 2025, the first summit between the European Union (EU) and Central Asia was held in Samarkand, Uzbekistan. Among the key conclusions of this meeting was the expressed intention to elevate cooperation to a *strategic* level. Indeed, the European Union aims to strengthen its collaboration with this region in many domains, including energy, environment policy and entrepreneurship. However, the Central Asian region is located in what Russia refers to as its 'near abroad', placing it in a sensitive context. This recent concept covers - sometimes despite themselves - the former Soviet republics that became independent in 1991, and which Moscow still considers its prime, if not exclusive, sphere of influence. From this perspective, any involvement by external actors, especially Western ones, may provoke hostile reactions, as illustrated by the invasion of Ukraine. While the situation in Ukraine is very different from that of Central Asia, there may be parallels and, consequently, a certain risk of replication.

Simultaneously, the war in Ukraine does not appear to constitute a turning point in the manner in which Russia intends to maintain its influence in its so-called 'near abroad'. It is certainly a more violent instrument, employed in a context where the situation has escaped Russia's control. Thus, the war in Ukraine can be interpreted as the most extreme example of a long-standing and linear policy, rather than a breaking point in Russia's management of bilateral relations with the former peripheries of the Soviet Union, generally structured around asymmetrical power dynamics.

The pertinent question is not *whether* but rather *under what conditions* Russia might replicate such subversive practices in other states within its 'near abroad'. The desire for greater strategic autonomy of some Central Asian states, as well as the increasing presence of external actors in this region, raise questions about the nature of a potential Russian reaction, as the hegemonic yet increasingly contested power in this strategic space.

A semantic clarification must be made from the outset: the Russian 'approach' or 'response' does not necessarily take the form of a direct military confrontation, but rather a broader spectrum of subversive actions, such as destabilization efforts, political interference or various forms of pressure. Since these methods did not originate in 2022, or even in 2014, there is no real reason to assume they will end with the ongoing war in Ukraine.

Could the recent economic rapprochement between Central Asia and the European Union trigger a Russian response aligned with its strategy in Ukraine, in order to maintain its influence in its Central Asian 'near abroad' ?

The European Union's economic expansion in a region highly strategic for Moscow: an acceleration of Central Asia's quest for emancipation since the war in Ukraine

Central Asia is a region with strategic significance: rich in hydrocarbons and REE (rare-earth elements), it is crossed by numerous gas and oil pipelines. Beyond the transportation of these natural resources, it serves as a critical transit hub along the trade routes linking Europe and China, as well as a corridor connecting Russia to its ally Iran. In this context, Central Asia represents a significant opportunity for the European Union, especially after 2022, and simultaneously a vital component of Russian power projection. The EU established its presence in the region during the 2000s through assistance programs, with cooperation intensifying after the 2010s. Nevertheless, Russia remains hegemonic in the area for historical reasons and regards it as an integral part of its 'near abroad'. Its economic, military and political influence remains strong throughout the region.

This perspective changed abruptly with the outbreak of the Russian invasion of Ukraine, which constituted a major geopolitical and strategic turning point. The conflict has pushed several states, particularly NATO members, to review their defence strategies in response to an increasingly unpredictable Russia. In the former Soviet republics, including those in Central Asia, this development has increased these states' concerns and even mistrust regarding Russia's intentions and the means it may employ to achieve them. As a result, these countries are increasingly seeking to diversify their international partnerships, notably with China and the EU, in order to find alternatives to their traditional collaboration with Moscow. This trend is exemplified in the Caucasus by the new agreement signed in July 2022 between the EU and Azerbaijan, particularly since it comes after the resumption of war in Nagorno-Karabakh. In Central Asia, Kazakhstan's strategic geographic position and natural resources have facilitated the conclusion of new cooperation agreements with the EU as early as 2015¹, as well as during the Samarkand summit in 2025², notably with an energy memorandum of understanding. More generally, this deepening cooperation reflects a dual logic: Brussels seeks to reduce its dependence on Russian hydrocarbons and achieve its green transition, while the Central Asian countries aim to reduce their structural dependence on Moscow. Although such cooperation and bilateral agreements existed before 2022, they have multiplied significantly in its aftermath, as illustrated by the visits of the Kazakh president to France in November 2024 and the Uzbek president in March 2025. Thus, this shift seems to have been accelerated by the hostilities in Ukraine. However, this diversification does not necessarily equate to a definitive distancing from Moscow: for instance, the Kazakh president signed a declaration of enhanced cooperation with Vladimir Putin only three weeks after his visit to Paris. Thus, the war in Ukraine did not fundamentally alter the region's enduring ties with Russia.

¹ The Enhanced Partnership and Cooperation Agreement (EPCA) between the European Union and Kazakhstan was signed in 2015 and entered into force in 2020.

² A similar protocol was signed between the European Union and Uzbekistan at the same summit.

The primary novelty is that, in this context of geostrategic uncertainty, several summits have been convened between the European Union and Central Asia, where the latter is increasingly positioning itself as a cohesive regional entity, which grants it a stronger stance and greater negotiating capacity vis-à-vis external partners. Such a development seems quite natural, as these countries, when acting in concert, represent a larger internal market and a greater resource mobilisation, thereby allowing for more investment, making the region more attractive to potential partners like the EU.

Returning to the dynamics of international summits, in December 2020, a high-level virtual forum brought together European and Central Asian representatives. This was followed, in January 2024, by the 'Global Gateway' project Forum held in Brussels which discussed the trans-Caspian transport corridors and issues. More recently, cooperation has been further consolidated with the first European Union-Central Asia summit held in April 2025 in Uzbekistan, previously mentioned in the introduction. During this ambitious encounter, issues concerning critical raw materials for the EU were discussed, as well as the development of transport infrastructure and the environmental challenges, most notably the highly sensitive water issue in a region increasingly affected by drought. The EU is expected to invest up to €12 billion in the region, which further demonstrates the tangible benefits of positioning itself as a coordinated and unified regional actor.

Despite this renewed and stronger European presence, Russia's involvement in the region remains undiminished. Moscow remains an essential trading partner in the area, involved in numerous energy projects, including nuclear ones³. It is also a major supplier of military equipment and, at least in principle, ensures regional security. However, a nuance must already be made on this point. While Russian forces intervened in early 2022 as part of the Collective Security Treaty Organisation (CSTO) to 'calm' the protests in Kazakhstan, it refused to do so in Armenia in 2023. Russia's inability, or unwillingness, to assist Armenia in its confrontation with Azerbaijan is an example of how its involvement in Ukraine makes it difficult for Moscow to maintain security in a region where it is supposed to do so. Thus, this situation is thereby undermining the credibility of its security commitments. Despite this, and beyond bilateral cooperation, multilateral frameworks continue to structure regional engagement, notably through the Eurasian Economic Union (EAEU) and the Caspian Economic Forum - even though only two Central Asian states are members of the former. Furthermore, a summit of the Shanghai Cooperation Organisation (SCO) was held in Astana in 2024. Yet, relations within the SCO may not be as harmonious as they may seem, as Russia appears concerned about China's growing influence in the region, particularly through the development of the Trans-Caspian Silk Road corridor and its numerous large-scale infrastructure investments. In this context, it is not the EU but China that is likely to economically challenge Russia's dominance in the region, despite the fact that the EU accounts for around 40% of foreign direct investment (FDI) in Central Asia.

Beyond the framework of the SCO, these various economic forums could, in theory, be understood as complementary mechanisms and aligned with the partnership diversification strategy pursued by

³ Kazakhstan's first nuclear power plant is expected to be built with Russian assistance. Another nuclear power plant is planned in Uzbekistan.

several Central Asian leaders. However, Russia has tended to oppose such an opening, thereby indirectly forcing a choice. Moscow's position has long reflected a logic of regional exclusivity, as Sergey Sukhankin notes with regard to the Caspian Sea, stating that 'since the late 1990s and early 2000s, Russia has consistently opposed the idea of admitting foreign actors (including multinational energy companies)'⁴, on the grounds that regional states can address local issues on their own and, furthermore, that such matters only concerns the neighbouring countries. In practice, however, this discourse of 'local management' has often equate to Moscow's influence over the regional affairs.

Russia's strong influence in the Central Asian region explains the currently moderate response, which could however escalate into a more direct reaction if control weakens

On the diplomatic level, although Russian political influence remains strong in the region, the five Central Asian states have preferred to adopt a neutral posture regarding the war in Ukraine – neither explicitly condemning nor endorsing Russia's actions. It is true that these states find themselves in a delicate situation: unwilling to legitimise Russia's invasion of a neighbouring sovereign state, nor openly criticise the region's dominant power. Despite this, certain bold positions have emerged, aimed at asserting a distinct voice that differs from Russia's, such as the Kazakh president's declaration in 2022 that his country would not recognise the independence of the so-called Donetsk and Luhansk 'republics'⁵. While Moscow did not officially react, such a divergence from a close ally can be interpreted as politically significant and potentially perceived as a source of tension.

Furthermore, Moscow has not explicitly reacted to this unprecedented economic rapprochement between Central Asia and the EU. For the moment, Russia seems to tolerate this development, arguably because its influence in this region remains more entrenched than in other contested theaters, such as Ukraine. Indeed, institutional and security cooperation between Moscow and Central Asia is much closer, as these countries are partly members of the SCO or the CSTO. Moreover, these states are generally perceived as having political positions broadly aligned with Moscow, with neither the intention nor realistic possibility to join the EU or NATO. Thus, it is not the economic diversification but the political alignment of the region that would concern Moscow the most. In addition, there are elements of a structural economic dependence on Russia, and even the presence of Russian military bases in Tajikistan⁶ and Kyrgyzstan⁷. As a result, it does not currently seem necessary for the Kremlin to adopt a more forceful response, but this situation cannot be ruled out if the regional balance of

⁴ Sergey Sukhankin, "La mer Caspienne, pôle énergétique émergent. Opportunités et limites," *Russie.Eurasie.Visions*, no. 138 (Paris: Institut français des relations internationales [Ifri], February 2025).

⁵ "President Tokayev Says Kazakhstan Will Not Recognize Donetsk, Lugansk as Independent States," *Caspian News*, June 20, 2022.

⁶ Russia's 201st Military Base, located in Dushanbe, Tajikistan.

⁷ Russia's Air Base No. 999, located in Kant, Kyrgyzstan.

power weakens its position. Ultimately, the escalation of means employed by Russia therefore largely reflects the situation in the country targeted by its influence.

For now, Moscow's strategy in response to this closer economic relationship appears to focus on instruments of soft power, particularly media influence and educational channels, as exemplified by Uzbek officers trained in Russian military academies, which contributes to sustain long-standing institutional ties. Such a 'soft' Russian response is understandable insofar, as it may be sufficient to preserve influence over its allies, especially since it is a cost-efficient strategy for a Russia facing economic difficulties. This approach may also be part of a broader political logic, whereby, despite increasing European engagement, Moscow might try to maintain a degree of control over the region by shaping public perceptions. In this regard, several Russian or Russian-language media channels, such as Rossiya Segodnya and Channel One Russia, continue to broadcast in Kazakhstan and other Central Asian states, often echoing the Kremlin's official line, which constitute a significant form of influence. Moscow has thus appeared to understand that economic engagement alone is insufficient to sustain long-term influence in the absence of accompanying rhetoric, and therefore meaning that as long as Russia controls the information flows, European actors can expand trade and investment in Central Asia, without necessarily weaken Russian domination. A comparable dynamic has been observed in Moldova, where the EU maintains a strong economic presence and represents a major trading partner, while segments of the population have historically supported pro-Russian parties critical of closer ties with Brussels. Recently, however, this informational influence has not gone unchallenged. In Central Asia, there have been reactions to these actions, as the Kazakh Ministry of Culture even launched an investigation into the activities of Sputnik Kazakhstan⁸, with similar situations in Azerbaijan and Moldova⁹. This reflects a more cautious stance toward foreign media influence.

Media-based propaganda is also a tool previously observed in Ukraine, although it proved insufficient to persuade uniformly the entire population. According to a survey conducted in March 2014 by the International Republican Institute, only 5% of respondents in eastern Ukraine (Donbas) believed that Russian-speaking populations were somehow threatened by the authorities in Kiev¹⁰. Although surveys are not always accurate or truthful, and must be interpreted with caution, these findings are completely at odds with the Kremlin's official narratives denouncing a systematic persecution or even a 'genocide' of Russian speakers in the Donbas region¹¹. This discrepancy raises questions of whether the Central Asian population really believes or internalizes Russian narratives. For instance, a survey by the Central Asia Barometer¹² revealed that 28% of Kazakhs respondents believed Russia was responsible for the invasion, while 19% considered Ukraine was to blame. Furthermore, despite sustained Russian media efforts to portray the 2022 invasion as a legitimate and necessary action, 44% of Kazakhs and 36% of Kyrgyz consider it to be 'somewhat' or 'totally

⁸ "Russian Soft-Power Entities Embroiled in Controversy in Central Asia," *Eurasianet*, April 24, 2025,

⁹ Searches were conducted at the headquarters of *Sputnik Azerbaijan* in June 2025. In 2023, Moldova also blocked access to approximately twenty Russian media websites.

¹⁰ According to a survey conducted by the Kyiv International Institute of Sociology (KIIS), 89 percent of Ukrainians did not believe that their government was composed of Nazis.

¹¹ Or the narrative claiming that a supposedly Nazi government had seized power in Kyiv.

¹² Olivier Ferrando, "L'Asie centrale face à l'invasion russe de l'Ukraine : les débordements d'un conflit régional," in *Regards sur l'Eurasie. L'année politique 2022, Les Études du CERI*, nos. 266–267 (2023): 38–43.

unjustified',¹³ ¹⁴. However, beyond public opinion, the war in Ukraine may nevertheless have generated a psychological effect, particularly among the elites of these countries. In this sense, it may serve as a warning signal to those who would like to gradually distance themselves from Russia's sphere of influence, and so reinforce the perceived risk of these actions. Alternatively, this warning signal may produce the opposite effect, leading these elites to be convinced of the absolute necessity of accelerating such processes.

On the other hand, although Russia's response in the region has been relatively moderate so far, this position is not fixed and may always evolve, depending on geopolitical dynamics. Generally speaking, and for reasons external to the situation even before 2022, Russia seems to be consolidating its relations with the Central Asian states that were once most unfavorable to it. However, at the same time, it is seeing 'its dialogue increasingly strained with its closest ally'¹⁵ - speaking of Kazakhstan (Levystone, 2023). There may be a degree of correlation between economic development and emancipation from Russian influence, with countries such as Kazakhstan, Uzbekistan and Azerbaijan combining these two factors, while also simultaneously experiencing growing tensions with Moscow. Furthermore, regional cooperation is not always fluid, as Russia defends its interests even at the risk of upsetting its closest allies. In this regard, it is unlikely that Moscow would wait for its influence to diminish significantly before expressing its concerns, and moreover, as has been noted, 'since 2014, Russia has clearly shifted from persuasion to ultimatums'¹⁶, with a further hardening of this trend since 2022. This suggests that even in contexts where Russia has a dominant position, its reaction can spontaneously become confrontational for various reasons that are not linked to immediate threats to its vital interests. The war in Ukraine has therefore only acted as an accelerator of a pre-existing pattern, rather than a fundamental rupture.

We may therefore conclude that, faced with these recent economic changes in Central Asia, the Kremlin has not adopted a militarised approach, like the one observed in Ukraine, since Moscow arguably felt more confident in its regional position. However, as the influence of the EU and China continues to expand, and some countries, most notably Kazakhstan and Uzbekistan, pursue greater autonomy, 'a scenario of regional (para)military confrontation cannot be ruled out.'¹⁷ Indeed, the region is of such strategic importance to Moscow that it cannot afford to risk losing its influence in favour of any other major power. However, Russia currently appears too focused on Ukraine to adopt a more assertive position in Central Asia. The latter thus emerges as a strategic hub and an economic partner with long-term potential. Its importance could further increase after the end of the war in Ukraine and in the event of a strengthened Russian pivot towards Asia - in the framework of its Eurasian doctrine.

¹³ Hannah S. Chapman and Raushan Zhandayeva, "Attitudes toward Russia's War on Ukraine in Kazakhstan and Kyrgyzstan," *PONARS Eurasia Policy Memo*, no. 877 (December 2023).

¹⁴ In both countries, a higher proportion of respondents belonging to the Russian minority expressed understanding of the invasion. By contrast, approximately one-quarter of respondents stated that they had "no opinion" on the issue.

¹⁵ Michaël Levystone, "Quelles relations bilatérales russo-centrasiatiques ?", *Diploweb.com: La revue géopolitique*, January 16, 2022.

¹⁶ Sukhankin, "La mer Caspienne," 23.

¹⁷ *Ibid.*, 24.

Geoeconomic developments and dynamics observed over the past year in the region

Between the summer of 2025 (when the previous part of this article was written) and the present day (April 2026), a number of economic and geopolitical developments have taken place in Central Asia. These developments are part of the ongoing trends observed, whilst accentuating certain existing patterns. This section therefore focuses less on the Russia-EU competition, in order to account for the significant role that China and the United States play, or seek to play, in the region.

A key observation concerns the region's ongoing trajectory towards greater autonomy, characterised by its strategy of partnership diversification and its multi-vector foreign policy approach. Central Asia continues to emerge as a full-fledged actor on the international stage. Recent developments, notably the war in Iran, alongside ongoing ones (such as the war in Ukraine), have reinforced the strategic importance of the trade corridor linking the EU to China, in which the region is a central node. This commercial dynamic is accompanied by a growing global demand for energy and mineral resources - such as uranium, rare earths, gas and oil -, which are abundant in the region. Central Asia remains a significant supplier in this sector, for exemple, Kazakhstan is among the world's leading uranium producers, and Turkmenistan plays an important role in regional gas exports.

In addition, Central Asia has experienced robust economic growth, estimated by the World Bank at around 6.2% in 2025¹⁸, driven in particular by strong performance in Kazakhstan's extractive sector (particularly oil), Uzbekistan's industrial modernisation agenda, and sustained investment inflows. This economic acceleration strengthens its autonomy in potential cooperation choices, while also reflecting the growing importance of the trade corridors passing through it. For instance, the Trans-Caspian 'Middle Corridor' has recorded a significant increase in freight volumes and logistical investment since 2022. Thus, the region is repositioning itself, moving from a historically peripheral area under Russian economic and political influence, to a status as a region with growing strategic visibility on the global stage.

In this regard, a renewed rapprochement with the United States under the Trump administration was observed in November 2025, when the leaders of the five Central Asian states travelled to the White House to sign an agreement on critical minerals¹⁹. This agreement illustrates Washington's re-engagement into the region's geopolitical competition over strategic resources, which does not appear to conflict with the interests of the countries concerned, as they continue to pursue a strategy of diversifying partnerships. In this context, the Uzbek president even proposed the creation of a 'permanent secretariat to ensure ongoing coordination'²⁰ between the region and Washington, within the framework known as the 'C5+1' format.

¹⁸ "Central Asia Posts Growth Above 6% in 2025, Beating Advanced Economies," *Euronews*, February 6, 2026.

¹⁹ "Donald Trump Strengthens Partnership with Five Central Asian Countries," *Euronews*, November 7, 2025.

²⁰ *Ibid.*

Several US-led initiatives reinforced this trend, boosting Central Asia's growing importance in strategies to diversify supply chains away from China, and signaling a pivot towards this region. These include the C5+1 Critical Minerals Dialogue Meeting²¹ convened in May 2025 by the US State Department, the Critical Minerals Ministerial held in February 2026, as well as the analytical work of several leading think tanks like the Center for Strategic and International Studies (CSIS), all of which highlight the gradual integration of Central Asia into discussions on critical supply chains. More concretely, in February 2026, Washington and Uzbekistan signed an agreement establishing a joint investment mechanism in the strategic minerals sector²², which shows the operationalisation of this agenda. Overall, the strengthening of the American presence therefore signals the increasingly integration of the region into the diplomatic and geoeconomic priorities of the world's major powers.

Another key development is the growing effort to establish a corridor to Pakistan and the Indian Ocean, which has gained significant momentum over the past year and reflects a broader reconfiguration of regional connectivity architectures. This effectively means an extension of the China-Pakistan Economic Corridor (CPEC) into Central Asia, with the aim to extend existing corridors westwards and better integrating the region into transcontinental logistics networks. In practical terms, this extension is expected to link Uzbekistan to Pakistan, including access to the strategic port of Gwadar, via Afghanistan. It would also strengthen Kazakhstan's eastward integration through China, via the city of Ürümqi.

To this end, a trilateral agreement signed on 17 July 2025 between Uzbekistan, Afghanistan and Pakistan, marked a key step towards constructing a railway line connecting the three states²³. In addition, in July 2025 Kazakhstan expressed its willingness to contribute financially to the project by the construction of a section passing through Afghanistan (Turghundi-Herat)²⁴, signaling an increasing willingness among regional actors to participate in infrastructure development beyond their immediate borders. Taken together, these initiatives illustrate the consolidation of regional cooperation and a long-term vision for the strategic projects.

From this perspective, the corridor would further consolidate Central Asia's integration into global trade networks by providing direct access either to Indian Ocean maritime routes via Gwadar, or to Chinese logistic hubs. It would then partially ease the structural constraints caused by the region's landlocked geography. While recent political tensions between Kabul and Islamabad may pose an obstacle, the regional dynamics suggest that the project has moved beyond the purely conceptual phase towards early stages of pre-construction and institutional coordination. More widely, beyond this specific railway initiative, Central Asia has become a focal point of multiple major infrastructure and energy projects, marking significant regional development and increasing volumes of foreign investment. These include major cross-border gas pipelines such as the Central Asia-China pipeline, hydroelectric developments including the Rogun Dam in Tajikistan, and emerging trans-Caspian

²¹ While the C5+1 format has served as a framework for cooperation since 2015, the Critical Minerals Dialogue, launched in 2024, is a more recent initiative under this framework dedicated specifically to critical minerals.

²² "US and Uzbekistan Sign Critical Minerals Pact," *Reuters*, February 18, 2026.

²³ Saniya Sakenova, "Uzbekistan, Pakistan and Afghanistan Sign Agreement on Trans-Afghan Railway," *The Astana Times*, July 21, 2025.

²⁴ China and Central Asia Studies Center, "Media Monitoring Report, July 14, 2025," *China & Central Asia*, July 14, 2025.

maritime and logistics corridors to Europe. These initiatives illustrate the region's gradual transformation into a strategic global hub.

The European Union continues to strengthen and expand its presence in the region. The EU-Central Asia Summit held in Samarkand (3-4 April 2025), previously mentioned in the introduction, represented a milestone in the economic rapprochement between the two regions. It resulted in European investment agreements worth more than €12 billion. The EU therefore aims to anchor this cooperation in a long-term perspective, by institutionalising it with a structured and stable framework. Furthermore, the third EU-Central Asia Economic Forum, held on 26 November 2025 in Tashkent (Uzbekistan), reinforced this dynamic of engagement. This forum, focused on strategic cooperation, continues to reflect European growing interest in the region's critical raw materials (uranium, copper, etc.) which are essential for Europe's green and digital transitions. For Central Asian states, the priority remains the diversification and the expansion of economic partnerships, in order to reduce an unbalanced power dynamic, particularly with China. In this evolving geopolitical landscape, the shared interests of the EU and China are therefore reshaping the region, which has become a key Eurasian transport hub.

On the other hand, China is now the dominant economic actor in Central Asia. We have previously discussed the massive Chinese investments in the region, largely structured around the Belt and Road Initiative (BRI). Central Asia occupies a strategic position in this framework, notably as part of the 'Middle Corridor' of this larger project. Held between the 16 and 18 June 2025 in Astana (Kazakhstan), the second China-Central Asia Summit resulted in several economic agreements in areas such as infrastructure development, trade and energy. While China shares broadly similar interests with the EU, its approach remains guided by its own priorities. While the EU has a regulatory and partnership-based model, China's strategy under the BRI is particularly focused on large-scale infrastructure financing. In both cases, however, the supply of strategic raw materials, the development of transport infrastructure and clean energy constitute central priorities. In 2025, more than 20 renewable energy projects involving Chinese participation were underway across Central Asia, with a combined value exceeding \$9 billion²⁵.

In any case, Beijing is strengthening its geostrategic position, economically surpassing both the EU and, in certain aspects, even the traditional influence of Moscow. China continues to hold a clear comparative advantage, driven by its model of geopolitical influence based on large-scale and long-term investments. A notable illustration of this approach is the example of the China-Pakistan Economic Corridor (CPEC), which includes, among other elements, the modernisation of the Karachi-Peshawar railway line (ML-1), extending over approximately 1,700 kilometers, and which could cost between \$6 and \$10 billion. The main financing is expected to come from Chinese institutions. Although interrogations persist regarding Pakistan's repayment capacity, the project appears to be progressing, at least at the planning stage. More generally, beyond the infrastructure required for the Belt and Road Initiative, China's engagement has expanded significantly. According to China's Ministry of Commerce, Beijing is estimated to have invested over \$30 billion in Central

²⁵ "China Ramps Up Investment in Central Asia Countries, Total Investments Surpassing \$30 Billion Now: MOFCOM," *Global Times*, June 17, 2025.

Asia²⁶ across a wide range of projects, particularly in digital technologies (5G and smart cities), energy (solar developments in Uzbekistan²⁷ and Kazakhstan), and industrial manufacturing (BYD automobile production in Uzbekistan). These initiatives deepen its structural presence across Central Asia.

Russia then appears increasingly marginalized by its two main competitors (the EU and China). The prolonged and ongoing war in Ukraine forces it to allocate significant economic and diplomatic resources to its western flank, thereby limiting its capacity to sustain its policy in its traditional sphere of influence. Moreover, Russia's deteriorating domestic economic situation has reduced its attractiveness for Central Asian labour migrants, which indirectly weakens one of the key elements of the economic interdependence between the two actors. At the same time, the war has led to tensions, both diplomatic - as illustrated by the lack of political support for Russia's actions in Ukraine - and social, as the enlistment of Central Asian nationals into the Russian army has created frictions, although these countries are struggling to counter the phenomenon.²⁸ This relative decline in influence is also visible in the transformation of the diplomatic format: the dialogue still exists between the five Central Asian countries and Russia, but it is now increasingly embedded in a multilateral framework rather than a bilateral one. That said, a similar approach is generally applied to relations with other partners, such as the European Union. In this context, Russia's engagement is shifting from economic cooperation towards security and energy-related ties. Military collaboration continues through joint exercises with Central Asian countries, such as *Hamkorlik 2025* with Uzbekistan, or the multilateral exercise *Eternal Brotherhood IV*, which includes Pakistan, Uzbekistan and Kazakhstan among its participants. However, as previously mentioned, security cooperation is constrained by Russia's military vulnerabilities, which may have affected the perception of its reliability in the eyes of its regional allies. Its security influence may therefore be eroded and progressively reduced in the post-Soviet space, including Central Asia, although it remains structurally embedded in institutional frameworks.

The two geopolitical setbacks represented by the recent capture of Nicolás Maduro in Venezuela and the war in Iran, both important allies of Moscow, have not, at first sight, caused any firm response from the Kremlin beyond standard diplomatic statements. These events raise broader questions regarding a potential downgrading of Russia's status in Central Asia, and its potential ability to project influence in the region. Moreover, while China remains a strategic partner of Russia, it is also a structural competitor in this region. As a result, this duality limit Russia's room for manoeuvre in countering Beijing's expansion, both materially and symbolically. Thus, the anti-Western or anti-imperialist discourse put forward by Moscow cannot be extended to its Chinese ally.

In this context, Central Asian countries therefore appear to have benefited from a historic strategic opportunity allowing them to diversify their partnerships and gradually reduce their dependence on Moscow, without provoking, for the moment, any major coercive response from Russia.

²⁶ *Ibid.*

²⁷ For example, the China Energy Engineering Corporation (CEEC) project in the Bukhara and Kashkadarya regions is valued at approximately RMB 3.3 billion (approximately €410 million).

²⁸ "L'impuissance des États d'Asie centrale face à l'enrôlement de leurs ressortissants dans l'armée russe," *Le Monde*, July 10, 2025.

Consequently, no single external actor currently appears capable of exercising exclusive dominance over the region. China is predominant in economic terms, but it faces increasingly competition from the EU and, in a more forward-looking perspective, from the United States. Russia, meanwhile, constrained in its war in Ukraine, appears to be experiencing a gradual erosion of its status as a dominant regional actor. Moscow is therefore attempting to reorient its regional strategy by refocusing on security cooperation and energy, which remain its traditional pillars.

In this context, the strategy pursued by Central Asian states appears, at this stage, to be producing positive and durable effects: the region has shifted from a position of structural dependence towards a more balanced and autonomous posture. In this emerging competitive environment shaped by major external powers, Central Asia is taking advantage of this rivalry. Beyond the emergence of this new multipolar equilibrium, a second objective also appears to have been achieved: establishing themselves as a geopolitical pivot. Central Asia is increasingly capable of exerting influence on the international stage, particularly when acting in a coordinated manner.

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