

Central Asia in the Focus of Global Rivalry: Challenges and Opportunities for Ukraine

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Summary

Central Asia (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan) has become one of the most strategically dynamic regions of Eurasia, where the competing interests of global and regional actors intersect. None of them enjoys unquestionable dominance. The states of the region are increasingly confidently pursuing a multi-vector foreign policy aimed at maximizing strategic autonomy and diversifying partnerships.

Russia is gradually losing its regional primacy under the pressure of military miscalculations, sanctions, and the growth of Chinese influence. China has established itself as the leading geoeconomic power, although its political and social influence remains limited. The EU is strengthening its presence as the largest foreign investor and a key promoter of the Trans-Caspian International Transport Route. The United States is reorienting toward transactional “mineral diplomacy”, while Turkey, the Gulf states, and Asian countries are forming their own niches of influence.

Ukraine’s presence in the region remains structurally weak, its treaty and legal framework outdated, and its informational presence limited. At the same time, Ukraine’s institutional steps in 2025-2026 signal a change in approach. The countries of Central Asia (CA) adhere to cautious neutrality regarding the war against Ukraine, avoiding both recognition of the Russian paradigm and open support for the Ukrainian position. This is pragmatic risk hedging that leaves room for deepening engagement, provided the right approach is taken.

Problem Analysis

Central Asia is acquiring growing significance as a competitive geopolitical space, driven by a set of interconnected structural factors: the erosion of liberal international order norms, the intensification of inter-state strategic competition, and the increasing weight of continental connectivity in the Eurasian dimension. The region, which unites five post-Soviet states and is located at the crossroads between Russia, China, South Asia, and the Middle East, possesses a unique combination of strategic assets: hydrocarbon reserves, rare-earth metals, critical water resources, and control over key transit corridors.

The region's strategic environment is shaped by the influence of the competing agendas of leading external actors – Russia, China, the United States, the EU, Turkey, and Iran. The cumulative impact of the systemic shocks of recent years – Russia's full-scale invasion of Ukraine, Western sanctions pressure, instability in Afghanistan, and the strategic expansion of China's "Belt and Road" initiative – has fundamentally reshaped the role of Central Asia: from a peripheral post-Soviet space, the region has become a key theater of geoeconomic and geopolitical rivalry.

The region's macroeconomic outlook remains generally positive, although marked by a slowdown. The expected average growth rate in 2026 is 4.8-5.2%, compared with more than 6% in 2025.¹ The driving forces are domestic demand, remittances, and infrastructure investment, while the key risks remain commodity market volatility and structural dependence on the Russian Federation (RF) and China. Despite the favorable economic dynamics, the region retains significant vulnerability to external pressure, which in the long term could generate hard-to-predict destabilizing consequences for regional stability.

In order to identify key challenges and potential opportunities for Ukraine, this study will apply a multidimensional analytical approach. In particular, the analysis will cover the dynamics of bilateral trade over 2022-2025, the volumes of foreign direct investment (FDI), the level and nature of military presence, as well as the quantitative parameters of labor migration from the countries of the region to recipient states. Additional attention will be paid to indicators of educational and academic interaction, as well as institutional and infrastructural capacity for ensuring cultural and humanitarian cooperation, which will make it possible to form a holistic picture of current trends in regional interdependence and their impact on Ukraine's national interests.

Russia views Central Asia as a zone of privileged influence within the framework of the "near abroad" doctrine, implementing a comprehensive strategy of keeping the region within its own orbit through institutional, economic, security, and humanitarian instruments. The architecture of Russia's presence rests on the Commonwealth of Independent States, the Eurasian Economic Union, and the Collective Security Treaty Organization as mechanisms for institutionally entrenching dependency, supplemented by bilateral military agreements, labor migration, and a media space carrying Russian narratives. The Kremlin's key strategic goal remains preventing a transatlantic and broader Western military-political presence in the region, while simultaneously containing excessive Chinese expansion without moving to open confrontation with Beijing. Important components of Russia's strategy include securing its own economic interests and maintaining influence through mechanisms of labor migration, media presence, and cultural-humanitarian ties.

Russia's economic presence remains substantial. Kazakhstan accounts for 55-60% of the RF's trade turnover with the region – \$27.4 billion in 2025 – and absorbs 23.6% of the total FDI (\$17.1 billion) attracted by the country in 2024.² Uzbekistan is the second-largest regional trade partner, owing to industrial cooperation and re-export activity. In Uzbekistan, 3,200 companies with Russian capital operate, with a total portfolio of approximately \$44 billion; trade turnover exceeded \$13 billion in 2025, with a declared target of reaching \$30 billion by 2030.³ Russia holds strong positions in

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Kyrgyzstan and Tajikistan, leveraging migration and educational instruments. Turkmenistan's neutrality allows the country to remain on the basis of multilateral diplomacy.

Russian investments are concentrated in the fields of construction, IT, industry, and energy. It is expected that in the coming years Russian investment presence will continue to expand, particularly in the areas of nuclear energy, energy infrastructure, and the localization of industrial production. The expansion of Russian investments in nuclear energy and industrial localization in Uzbekistan and Kazakhstan is a deliberate step toward creating technological dependency in critical sectors, providing mechanisms of influence that would persist even amid further deterioration of political relations.

The RF remains the only external actor with an institutionally entrenched network of military bases: the 201st Military Base in Tajikistan – Russia's largest foreign military facility – the Kant Air Base in Kyrgyzstan, and strategic missile-defense and anti-satellite defense facilities in Kazakhstan.

Despite China's growing economic power in the region, Russia remains the primary destination for young people and labor migrants from Central Asia. According to 2023 statistics, 185,200 students from Central Asia were studying at Russian universities, compared with 32,500 in China.⁴ Approximately 3.5-4 million labor migrants from the region, mostly from Uzbekistan, Tajikistan, and Kyrgyzstan, remain in the Russian labor market.⁵ All three countries show a noticeable decline in this flow compared with 2024, which may indicate trends toward a structural reorientation of labor migration. However, the Russian direction will remain relevant, and the Russian language continues to function as an instrument of career and financial mobility.

At the same time, the RF's positions in CA have significantly weakened under the influence of military miscalculations and economic losses associated with waging the war against Ukraine. Additional factors include a decline in the perception of Russian military power, the negative effect of Western sanctions, growing concern among the region's states regarding Russian revisionism, and the strengthening of the economic influence of the People's Republic of China (PRC). Although Moscow continues to retain significant influence, its ability to achieve unquestionable dominance in the region is gradually diminishing.

China has established itself as the dominant external economic actor in Central Asia, implementing a strategy that combines trade integration, infrastructure investment, development loans, and digital expansion, including the export of surveillance technologies. The PRC's goals include ensuring the stability of the western borders of the Xinjiang Uyghur Autonomous Region (XUAR), preventing Islamization, expanding ties among the participating countries of the "Belt and Road" initiative, securing imports of energy resources and raw materials, increasing political influence while minimizing military engagement, and reducing the RF's monopoly influence over Eurasia.

Trade between the PRC and the region reached a record \$106.3 billion in 2025, three times more than a decade ago.⁶ Kazakhstan is Beijing's largest partner, accounting for nearly half of this trade (\$48.7 billion).⁷ The PRC's economic influence is particularly tangible in Kazakhstan, Kyrgyzstan, and Turkmenistan.

Despite its economic dominance, China faces persistent anti-Chinese sentiment, driven by concerns over debt dependency, policy toward the XUAR, and the penetration of "soft" power – with 13 Confucius Institutes across the five CA countries (as of 2024).⁸ Turkmenistan hosts a Chinese Center for Language Education and Cooperation, which is also funded by China's Ministry of Education.⁹

Despite its traditional caution in the security dimension, China is steadily increasing its regional presence through joint counter-terrorism initiatives, intelligence cooperation, and border security infrastructure, driven primarily by concern over the possible spillover of instability from Central Asia into Xinjiang. Beijing has no official military bases, although individual reports indicate the funding of

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a number of Tajik border facilities near the Afghan border. Tellingly, 19 of the 36 joint military exercises conducted by the PRC with countries of the region between 2002 and 2023 took place specifically with Tajikistan.¹⁰ This indicates a deliberate shift by Beijing from security assistance toward establishing a limited but genuine border presence.

The **United States'** strategy in Central Asia is undergoing a transformation – from the democratization agenda of the post-Soviet era to a transactional model focused on access to critical minerals, ensuring compliance with the sanctions regime, and a limited balancing of Chinese and Russian influence. The diplomatic frameworks for this engagement are the “C5+1” and “B5+1” formats. Despite a significant investment portfolio – approximately \$51 billion, or 19% of the region's total FDI¹¹ – the United States' trade and economic presence remains structurally weak compared with that of China or the EU. More than 600 enterprises with American capital operate in Kazakhstan,¹² and more than 300 in Uzbekistan.¹³ Tajikistan has more than 70 joint ventures,¹⁴ many of which are owned by Tajik citizens who have emigrated to the United States. In Turkmenistan, the volume of economic projects implemented with the participation of American companies has approached \$45 billion.¹⁵ Beyond energy and critical minerals, growing interest from American business is being observed in the logistics sector and the digital economy.

Washington faces a set of systemic constraints: geographic remoteness, the absence of a permanent military presence following its withdrawal from Afghanistan in 2021, and growing skepticism among regional elites regarding the reliability of American commitments, especially against the backdrop of operations in Venezuela and against Iran. U.S. influence is sustained primarily through financial institutions, technology partnerships, educational networks, and sanctions instruments.

The **EU** increasingly views CA through the lens of energy diversification, ensuring the resilience of critical raw material supply chains, and reducing dependence on Russia. A key instrument of this reorientation is support for the Middle Corridor as an alternative Eurasian route bypassing Russian territory. EU policy in the region focuses on infrastructure investment, institutional development programs, trade facilitation, cooperation on the “green” transition, the implementation of water and climate projects, and the development of multimodal transport corridors.

Statistics confirm the EU's growing weight in the region: in 2024, Brussels' share in Central Asia's foreign trade was 24.7%.¹⁶ In 2025, the EU strengthened its position as the largest foreign investor in CA, accounting for more than 40% of the region's total FDI.¹⁷ The EU–Central Asia Summit in April 2025 institutionalized this rapprochement. The EU's security presence remains functional through the Border Management Programme in Central Asia (BOMCA).¹⁸

Brussels lags behind Russia and China in the depth of its systemic influence due to the absence of a security presence, geographic remoteness, and bureaucratic constraints. Among EU member states, Germany, Italy, and Hungary display particular activity toward the region. At the same time, the question of whether Hungary will remain an active player in CA under new political leadership remains open.

Competition between **Turkey**, Iran, and the Arabian monarchies in Central Asia is an organic component of the broader transformation of the Eurasian balance of power, with each actor pursuing a fundamentally different model of presence. Turkey is unquestionably the most multifaceted Muslim actor in the region, combining cultural-civilizational, economic, and security dimensions. The Organization of Turkic States serves as the institutional framework for pan-Turkic integration, while trade with the region grew from \$6 billion in 2018 to \$14.5 billion in 2025, and the number of Turkish companies in the region increased from 4,000 to more than 7,000.¹⁹ The main centers of Turkish investment are Kazakhstan and Uzbekistan. Ankara is promoting its own transport architecture through the Kars–İğdır–Dilucu Railway Project and its participation in the development of the Middle Corridor, positioning itself as an indispensable infrastructure intermediary between Central Asia, the South Caucasus, and the Mediterranean. Turkey is perceived by the states of the

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region as an acceptable defense partner despite its NATO membership, reflecting the uniqueness of its geopolitical positioning.

The **Arabian monarchies** – the United Arab Emirates (UAE), the State of Qatar, and the Kingdom of Saudi Arabia (KSA) – have established an investment presence in the region, focused on renewable energy, logistics, the agricultural sector, and finance. Investments from the Gulf states are perceived by regional governments as politically acceptable, granting them privileged access and minimal political resistance. The UAE is the most dynamic of the three players: drawing on its sovereign wealth funds, Abu Dhabi is increasing its investments in energy and port infrastructure and aviation, concentrating its efforts in Kazakhstan and Uzbekistan. The KSA positions itself as the dominant investor in “green” energy. Saudi capital is most strongly represented in Uzbekistan, where 27 enterprises with Saudi capital operate, implementing approximately 60 investment projects, including the region’s largest wind farm, Aral Wind (5 GW). The bilateral project portfolio with Tashkent has approached \$30 billion.²⁰ Qatar remains the youngest player, yet demonstrates the highest growth rates: its investments in Kazakhstan increased from \$13 million in 2022 to more than \$1.1 billion in 2025.²¹ Despite the evident growth of their economic presence, none of the Gulf monarchies has demonstrated any intention to establish military infrastructure in the region.

Iran views Central Asia through the lens of two interconnected strategic interests: expanding access to Eurasian markets and overcoming the consequences of international isolation. The instrument for achieving these goals is the active promotion of the “North–South” transport corridor, within which Turkmenistan plays the role of a critical logistics partner. Amid the escalation of hostilities in the Gulf and intensifying sanctions pressure, partnership with the states of the region has gained additional significance for Tehran as a tool for minimizing economic losses caused by the war. Iran’s economic presence covers Kazakhstan, Uzbekistan, and Tajikistan, with investments concentrated in agribusiness, infrastructure, and energy. A telling example is the agro-industrial projects of the Golrang Industrial Group, worth \$120 million, in Kazakhstan.²²

A separate category of players in the region is formed by **Asian countries**, the most notable of which are India, Pakistan, South Korea, and Japan. India seeks to establish itself as a geopolitical counterbalance to the PRC, but faces geographic constraints. Pakistan views the region primarily through the lens of transport integration and Chinese projects. South Korea is gradually becoming one of CA’s most influential technology partners. Japan is concentrating on infrastructure, the “green” economy, and institutional cooperation.

India positions itself as a strategically significant but financially constrained player in the region. Its economic presence is concentrated in Kazakhstan and Uzbekistan – trade turnover with the former approached \$1 billion in 2024,²³ while investments in both countries combined amount to approximately \$800 million. More than 600 Indian companies operate in Kazakhstan, while there are 375 enterprises²⁴ with Indian capital in Uzbekistan. India’s real influence is shaped not through capital investments, but through sectoral presence in pharmaceuticals, healthcare, IT, and education, as well as through infrastructure projects – the port of Chabahar and the “North–South” corridor, which provide an alternative route to the region bypassing Pakistan. India regards CA as a strategically important region for access to energy resources, balancing the influence of China and Pakistan, and implementing connectivity projects through Iran.

South Korea has evolved from a peripheral diplomatic player into a structurally entrenched economic partner of Central Asia. Seoul views the region through the lens of three strategic interests: diversifying critical mineral supply chains, expanding industrial cooperation, and geopolitical balancing amid growing Chinese presence. Kazakhstan and Uzbekistan remain the key platforms: cumulative Korean FDI in the former exceeds \$11.1 billion over two decades, with 894 joint ventures as of the end of 2025,²⁵ while in the latter it stands at \$8 billion, with nearly 1,000 joint ventures as of 2026.²⁶ Sectoral presence covers manufacturing and the automotive industry, electronics, digital governance, and energy. Seoul’s strategy rests on a combination of economic diplomacy,

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technological partnership, and “soft” power, with a minimal security component. Unlike Russia or the United States, South Korea builds its influence exclusively through economic and technological instruments, which makes its presence politically acceptable to all regional actors simultaneously.

Despite decades of diplomatic engagement and assistance, **Japan’s** overall influence in CA remains moderate and constrained by geographic remoteness and strong competition from the PRC, the RF, Turkey, and, increasingly, the EU. Japan’s regional position can be characterized as a cautious but consistent middle-power strategy, based on economic engagement, technological expertise, and political pragmatism. Japan’s vision is aimed at strengthening regional resilience and reducing the excessive dependence of the CA states on the RF and the PRC, while avoiding direct geopolitical confrontation with either of these states.

Ukraine’s presence in CA remains limited. Before 2014, the region was perceived as an integral part of the Russian vector, which hindered the development of the bilateral track and bilateral treaty and legal framework, confining cooperation to the framework of Russia-oriented integration associations. Since the start of the full-scale invasion in 2022, it has continued to be inert in character. Certain personnel-related aspects, a fragmented information presence, and transport and logistical obstacles have had a negative impact on the development of partnerships.

A number of institutional decisions adopted in 2025-2026 contributed to the intensification of dialogue with the region. The appointment of the Ambassador of Ukraine in Astana, the establishment of a dedicated department within the structure of the Ministry of Foreign Affairs of Ukraine, the introduction of the position of Special Representative of the Minister of Foreign Affairs for Central Asia, as well as a regional tour of the CA countries by the Deputy Minister of Foreign Affairs of Ukraine, signal a change in Ukraine’s approaches to the region. These steps demonstrated recognition of the Central Asian vector as an independent and priority direction of Ukrainian foreign policy, rather than merely a component of the broader Asian track.

The first signs of an intensification of dialogue at the political level became noticeable in 2025 – the first in-person meeting between the presidents of Ukraine and Kazakhstan since the start of the RF’s full-scale invasion took place (September 2025), and governmental and business contacts with other countries of the region were resumed. At the same time, these steps should not be interpreted as a willingness on the part of these countries to abandon their policy of neutrality, let alone to challenge the dominant powers in the region. There is an evident desire on the part of the CA states to maintain a balanced multi-vector policy, preserving room for maneuver among the main external centers of gravity.

Ukraine’s total trade turnover with the region for the period 2022-2025 was as follows: 2022 – \$1.4 billion; 2023 – \$1.2 billion; 2024 – \$878 million; 2025 – \$881 million. For comparison: in 2021, it was \$2.1 billion.²⁷ As of 2026, 1,260 enterprises with Ukrainian capital are registered in Kazakhstan.²⁸ In Kyrgyzstan, 59 such companies have been recorded (2024 data).²⁹ At the beginning of 2022, more than 170 enterprises with Ukrainian capital were registered in Uzbekistan.³⁰

According to the National Bank of Ukraine, Kazakhstan is the only country in the region that has maintained sustained investment interest in Ukraine over the past 10 years. By the end of 2025, Kazakhstan had invested \$5 million in Ukraine, compared with \$11.6 million in 2024.³¹ In turn, in 2025 Ukraine invested \$18.6 million in Kazakhstan.³²

Before 2022, Ukraine held the position of one of the leading educational hubs in Eastern Europe, attracting 84,136 foreign students as of the beginning of the year.³³ The full-scale invasion dealt a significant blow to educational diplomacy as a tool of “soft” power; however, the retention of more than 21,000 foreign students amid active hostilities in 2026³⁴ demonstrates the institutional resilience of the higher education system and its potential for recovery. Turkmenistan and Uzbekistan remain among the top 20 countries of origin for foreign students in Ukraine, which indicates the preservation

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of humanitarian ties with Central Asia despite the unfavorable security situation and intensifying competition from alternative regional educational centers.

Thus, China leads in trade, infrastructure, and investment. The RF remains a “security contributor” and a labor market. The EU acts in the region as a “soft” power and an important trade partner. The United States shows interest in CA as a source of raw materials and alternative mineral supply chains, exerting financial pressure through sanctions instruments. At the same time, Ukraine’s regional prospects are influenced by the situation on the front, the progress of the diplomatic track, and the state of relations with the United States.

Forecasts and Prospects

Over the next decade, Central Asia will remain one of the most dynamic regions of Eurasia. The paradigm of dominance by a single external actor is definitively losing relevance: the region is taking shape as a competitive multipolar environment in which extra-regional players and regional states pursue goals that are both shared and, often, contradictory.

The defining strategic trend will be the gradual erosion of Russian dominance against the backdrop of the expansion of China's geoeconomic influence. However, the PRC's rise does not automatically translate into political hegemony. The states of the region will continue to pursue a multi-vector foreign policy aimed at maximizing the benefits of cooperation with external partners while preserving strategic autonomy.

The future balance of power in Central Asia will largely be determined by the interplay of several key variables: the trajectory of the Russia-Ukraine war, China's ability to sustain economic growth, the dynamics of the security situation in Afghanistan, the effectiveness of domestic reforms, and the restructuring of Eurasian transport and logistics systems. Climate change and water resources form a separate, but increasingly critical, dimension of regional vulnerability.

The most likely scenario is a combination of deepening intra-regional economic integration and transport and logistics development, alongside the persistence of ongoing geopolitical competition among external actors. In this context, Central Asia will acquire growing significance in the global competition for energy and rare-earth resources, supply chains, and technologies, which directly increases the region's strategic relevance for Ukraine's foreign policy strategy.

Systematic and comprehensive diplomatic and expert work by Ukraine with the region will, in the coming years, make it possible to achieve progress on the trade-economic, transport-logistics, educational-academic, and humanitarian tracks. Ukraine can position itself as a partner in the development of transport connectivity, a supplier of technologies, an exporter of agricultural products, a participant in industrial modernization projects, and a major educational and innovation hub.

Conclusions

Central Asia has become a strategically important geopolitical space of Eurasian competition, in which no external actor enjoys unquestionable dominance. The states of the region are increasingly actively asserting their own agency, pursuing a multi-vector foreign policy aimed at maximizing strategic autonomy. Russia is gradually losing its regional primacy, while China is strengthening its geo-economic position with limited political influence.

Since the start of the full-scale invasion, the Central Asian five have adhered to cautious neutrality, driven by economic pragmatism, sanctions risks, and post-imperial sensitivities. Under these conditions, Ukraine's policy toward the region should avoid demands for public solidarity and should be based on a three-dimensional approach: quiet political engagement, targeted restoration of economic ties, and prioritization of people-to-people contacts. Excessive pressure from Kyiv would have a counterproductive effect.

Kazakhstan and Uzbekistan remain the most promising trade and economic partners. Engagement with Kyrgyzstan, Tajikistan, and Turkmenistan should be developed in the format of sectoral cooperation, with an emphasis on educational partnership, logistical inclusiveness, agricultural technology transfer, and orderly labor migration. The Middle Corridor is a key strategic vector, opening up access for Ukraine to Asian markets and alternative Eurasian supply chains. An additional advantage is Ukraine's unique experience in hybrid warfare, unmanned technologies, and cybersecurity, which represents growing value for regional partners.

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