REPORT SECTION

Central Asia at a Crossroads:

Spheres of Influence and the New Great Game

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Introduction

Central Asia, historically shaped under the shadow of various empires, has transcended its traditional role as a mere transit zone and is increasingly emerging as a critical geopolitical space, defined by both its economic potential and socio-political structures. In the aftermath of the Soviet Union's collapse, the states of the region—Kazakhstan, Uzbekistan, Turkmenistan, Kyrgyzstan, and Tajikistan—embarked upon nation-building processes. While striving to adopt outward-oriented development models, they simultaneously confronted complex domestic dynamics characterised by authoritarian governance structures and persistent ethnic and societal tensions.

Economically, despite Central Asia's abundant natural resources, the management of these assets has largely been framed by externally dependent economic relations and narrowly focused development paradigms. Although these resource-based economies, reliant primarily on energy and mineral exports, have facilitated integration into global markets, they have also engendered significant socio-economic challenges, including income inequality, structural unemployment, and the outward migration of younger populations.

From a sociological perspective, the tension between modernisation processes and entrenched traditional social structures has generated a profound identity crisis, particularly among younger generations. This crisis has produced notable gaps in social cohesion and political representation, exacerbating existing societal vulnerabilities.

Politically, the foreign policies of Central Asian states have been predominantly guided by a principle of "multi-vector balancing," wherein governments seek to cultivate simultaneous and strategic relations with multiple global power centres, including China, Russia, the United States, Türkiye, and the European Union. However, this multi-directional engagement has rendered the region not merely an object of great power competition but increasingly a set of autonomous actors endeavouring to navigate and influence the contours of this rivalry in pursuit of their national interests.

This article aims to conceptualise Central Asia not solely as a battleground for external powers but as a region where internal dynamics actively shape and redefine the terms of geopolitical competition. Through an examination of sociological fragilities, economic dependencies, and political trajectories, the analysis will explore the evolving contours of the "New Great Game," the principal actors involved, the strategies employed, and the profound implications for the peoples of the region.

(Uzbek Prime Ministry - Anadolu Agency)

Historical Background and the Soviet Legacy

Understanding the current political and socio-economic structures of Central Asia requires a critical examination of the structural legacy inherited from the Soviet era. The Soviet legacy has generated structural vulnerabilities in the region, particularly through unresolved border disputes, monocultural production systems, debt-based economic models, and the institutionalisation of non-democratic political cultures (Şahin, 2023).

First, the nation-building policies implemented along Stalinist lines from the 1920s not only shaped geographic boundaries but also redefined ethnic and identity structures to align with Soviet ideological imperatives. When the USSR divided Central Asia into five republics, it deliberately drew boundaries that exacerbated ethnic fragmentation and cross-border minority issues rather than promoting ethnic homogeneity (Maimaitiaili, 2020).

The Fergana Valley, for example, was left as a region where Kazakh, Kyrgyz, Uzbek, and Tajik populations were intricately interwoven. These artificial borders created a persistent tension between citizenship and ethnic identity, providing fertile ground for regional nationalisms. This structural issue has been the root cause of contemporary border conflicts, such as those between Kyrgyzstan and Tajikistan and between Uzbekistan and Karakalpakstan. Notably, the Kyrgyzstan-Tajikistan clashes in 2022 resulted in over 100 civilian deaths and the displacement of approximately 30,000 people (Al Jazeera, 2022).

Economically, Central Asian structures were designed during the Soviet period to support monocultural production. Soviet central planning transformed the republics into specialised production zones for specific commodities, notably cotton production in Uzbekistan and Turkmenistan, and hydroelectric power generation in Tajikistan and Kyrgyzstan. This strategy inhibited economic diversification and entrenched external dependencies (Pomfret, 2010). For instance, Uzbekistan was coerced into heavy dependence on cotton cultivation, which in turn contributed to a catastrophic environmental disaster: nearly 90% of the Aral Sea, located between Kazakhstan and Uzbekistan, has dried up, leading to severe public health crises and mass migration in the region (Utemisov, Kaypnazarova, & Nagmetov, 2024). Similarly, Tajikistan's economy became narrowly defined by its hydroelectric potential, with little industrial diversification (Timur, 2008).

The Soviet-era economic model caused systemic shocks during the post-1991 transition to market economies. According to IMF data, between 1992 and 1996, Tajikistan's GDP contracted by 60%, Kyrgyzstan's industrial output fell by 50%, and unemployment in Kazakhstan officially approached 25% (International Monetary Fund, 2001).

The Soviet period also witnessed the instrumental transformation of collective memory. Communist ideology actively suppressed religious structures, particularly Islam, and secularised societal memory, thereby undermining traditional local leadership. This weakening of traditional authority continues to render contemporary state-society relations fragile (Khalid, 2007). In the post-Soviet era, political elites largely emerged from former Communist Party cadres, leading to governance structures characterised by bureaucratic centralisation, security apparatus–based regimes, and extensive patronage networks.

The model of "central investment in exchange for political loyalty" developed during the Soviet era continues to influence the political economies of Central Asia. Many regimes today exhibit a high degree of responsiveness to external investment and support, perpetuating a "dependency cycle" in their foreign policy behaviours (Clarke, 2004). A recent illustration of this dynamic was the Samarkand Summit, held on April 4, 2025, during which the European Union pledged a €12 billion investment package for Central Asia. At the summit, Kazakhstan, Turkmenistan, and Uzbekistan reaffirmed their commitment to United Nations Security Council Resolutions 541 and 550, while the existence of the Turkish Republic of Northern Cyprus was conspicuously omitted (European Commission, 2025).

Russia's Role in Central Asia: A Flexibility Strategy Anchored in Sovereignty

Russia continues to be one of the most influential and enduring actors in the post-Soviet order of Central Asia. Historically perceiving the region as its "backyard," Moscow has sought to maintain its influence through various institutional mechanisms since the dissolution of the Soviet Union. Today, in the face of China's ascendancy, the West's soft diplomatic engagements, and the growing regional assertiveness of powers such as Türkiye, Russia has adopted a more flexible yet calculated strategy of influence.

Primarily, Moscow sustains its military footprint in the region through the Shanghai Cooperation Organization (SCO) and the Collective Security Treaty Organization (CSTO). Kazakhstan, Kyrgyzstan, and Tajikistan, in particular, have institutionalised their military cooperation with Russia via CSTO membership. The deployment of CSTO forces during the 2022 unrest in Kazakhstan underscored Moscow's role as the "ultimate guarantor" of regime security in the region (BBC News, 2022).

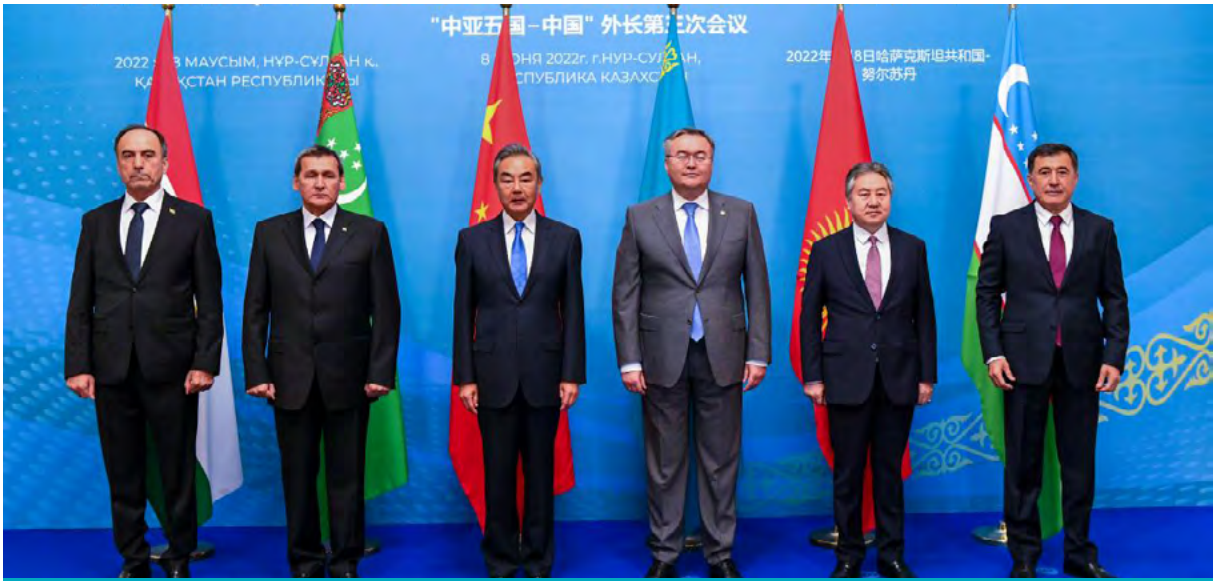
Russia's economic engagement with Central Asia extends beyond bilateral trade to encompass energy networks and labour migration flows. For instance, 80% of Kazakhstan's oil exports are transported through the Caspian Pipeline Consortium, which remains under Russian control (Yüksel & Topbaş, 2023). Although Turkmenistan sells most of its natural gas to China, it continues to rely on Russia for technical consultancy, equipment supply, and transit security. These energy infrastructure dependencies afford Moscow not only economic leverage but also a political instrument, allowing it to exert pressure through energy disruptions or pricing interventions (Oxford Institute for Energy Studies, 2024).

Labour migration from Central Asia to Russia constitutes both a socio-economic lifeline and a political lever. Approximately 15% of Tajikistan's population and 10% of Kyrgyzstan's population reside temporarily or permanently in Russia. According to World Bank data, remittances account for 31% of Kyrgyzstan's GDP, and in 2023, more than 40% of Tajik households relied on remittances — with 80% of these funds originating from Russia (Popławski, 2024).

In parallel, Russia maintains its cultural influence in Central Asia through language, media, and educational channels. Russian remains either an official language or widely used in Kazakhstan, Kyrgyzstan, and Tajikistan, facilitating Moscow's cultural and informational outreach. Russian media outlets such as RT, Sputnik, and Rossiya 24 continue to enjoy broad audiences across the region (Beishalieva, 2024).

During the Central Asia Economic Forum held in Dushanbe in July 2025, Russia underscored its intention to maintain a multidimensional presence in the region. The forum highlighted not only energy cooperation but also Russian-backed cultural programs and proposals for expanded educational exchanges, signalling Moscow's effort to counterbalance China's growing financial dominance and the European Union's normative appeal (SpecialEurasia, 2025).

Russia has constructed a mechanism of "soft tutelage" over Central Asia by leveraging energy infrastructures, military alliances, media influence, and labour migration policies. However, the war in Ukraine has created significant cracks in the hegemonic framework underpinning this influence. All five Central Asian governments have officially maintained neutrality in the Ukraine conflict and have not recognised Russia's claims over Ukrainian territory. In the first UN General Assembly resolution on March 2, 2022, Kazakhstan, Kyrgyzstan, and Tajikistan abstained, while Uzbekistan and Turkmenistan did not vote. In subsequent resolutions, Uzbekistan, Kazakhstan, Kyrgyzstan, and Tajikistan consistently abstained, whereas Turkmenistan continued to refrain from voting. This pattern illustrates that, while avoiding sanctions on Moscow, regional states have developed a more cautious and autonomous diplomatic discourse. Indeed, countries such as Kazakhstan and Uzbekistan have actively sought to diversify their foreign relations by strengthening engagement with China, the West, and the Organisation of Turkic States (Yüksel, 2023).



(Kazakhstan's Foreign Ministry - Anadolu Agency)

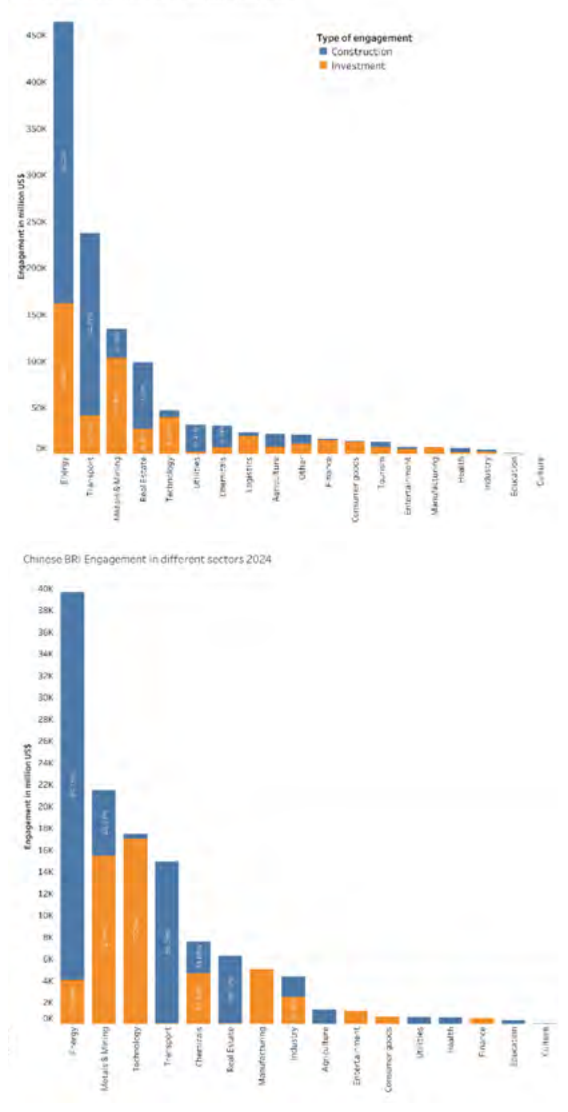
China's Role in Central Asia

Over the past two decades, the People's Republic of China has emerged as the fastest-rising external actor in Central Asia. China's strategy in the region has not been limited to energy security and infrastructure investments; it has also expanded into efforts to establish digital sovereignty, cultural influence, and new security architectures. This approach can be characterised as an "investment-backed authority projection," distinguishing it from classical forms of hegemony (Vakulchuk et al., 2019).

Figure 1. Belt and Road Initiative, the Chinese modern Silk Road project (Hussain, 2021)

Within the framework of the Belt and Road Initiative (BRI), China's investments in Central Asia have exceeded $40 billion. According to the 2024 China Belt and Road Initiative (BRI) Investment Report by the Green Finance & Development Centre (GFDC), investments in the Central Asian region increased by 40% compared to the previous year. These investments have primarily focused on energy infrastructure, railway projects, and cross-border logistics (Nedopil, 2025).

Figure 2. Chinese BRI Engagement in different sectors since 2013 and Chinese BRI Engagement in different sectors 2024 (Nedopil, 2025).



Initiated in 2013, the BRI framework also encompasses earlier projects such as the China–Central Asia Gas Pipeline, which began operations in 2009 and has since transported over 500 billion cubic meters of natural gas to China (Xinhua, 2024). During this period, six major railway projects were completed in Kazakhstan, three energy plants were constructed in Uzbekistan, and substantial natural gas infrastructure investments were made in Turkmenistan. In 2024, Kazakhstan and China signed over 40 agreements worth a combined $3.7 billion. Meanwhile, China has become the destination for over 70% of Turkmenistan's total natural gas exports. Of Ashgabat's $14.17 billion in total gas revenue in 2023, $9.6 billion was generated through sales to China. Although 2024 export data have yet to be fully released, a projected 5% growth rate suggests that China's share in Turkmenistan's total exports could rise to approximately 64%, significantly increasing Turkmenistan's dependency on Chinese buyers (Dayar, 2025).

Within this framework, Chinese investments have sparked various debates. Proponents emphasise positive impacts such as job creation, increased transit revenues, and improvements in infrastructure. Critics, however, point to risks related to debt dependency, the lack of transparency in contractual agreements, and the potential geopolitical costs of excessive reliance on Beijing, as illustrated in the case of Turkmenistan.

Tajikistan's external debt to China's Exim Bank amounts to 27.8% of its GDP. For Kyrgyzstan, this figure stands at 36.7%, and for Uzbekistan, it is 13%. While Turkmenistan's figures remain opaque, Kazakhstan has the lowest relative debt burden to China, with Chinese loans amounting to approximately 3.5% of its GDP. The case of Tajikistan is particularly illustrative: In 2011, Tajikistan ceded 1,000 square kilometres of border territory to China in partial settlement of its debt obligations (Cummings, 2012).

China's influence in Central Asia has increasingly extended beyond physical infrastructure to include digital surveillance systems and smart city initiatives. Companies such as Huawei and ZTE have built "Safe City" projects in Kazakhstan, Uzbekistan, and Kyrgyzstan, installing facial recognition systems, traffic monitoring cameras, and cybersecurity infrastructures. In Kazakhstan alone, more than 30.000 facial recognition cameras had been installed through Chinese grants as of 2023. According to some critics, these technologies raise concerns about cyber sovereignty and facilitate authoritarian-leaning regimes' abilities to monitor and control domestic dissent (Bobokhonov & Bekturganov, 2023).

Militarily, China has also deepened its security cooperation with Tajikistan and Kyrgyzstan under the pretext of counterterrorism efforts. Given their shared borders with the Xinjiang Uyghur Autonomous Region, these relationships hold strategic importance for China's internal security interests. In Tajikistan, joint border security bases, partly staffed by Chinese military advisors, have been established. Similarly, China and Uzbekistan have signed memorandums of understanding to create joint data centres focusing on border security and digital surveillance (Yousuf, 2024).

At the same time, Beijing has demonstrated renewed ambition to transform its economic weight into financial and technological dominance. During the Shanghai Cooperation Organisation summit in Tianjin in September 2025, President Xi Jinping proposed the creation of an SCO Development Bank, announced a 2-billion-yuan ($280.4 million) aid package for member states, and opened the BeiDou satellite navigation system to SCO partners. In parallel, Chinese officials promoted the idea of an "electro-yuan" system to support energy trade and infrastructure finance, signalling Beijing's intent to internationalise its currency in Central Asia (Wu, 2025). Complementing these financial tools, China also pledged $1.4 billion in credit lines for regional projects over the next three years.

Moreover, connectivity initiatives have accelerated: in June 2025, China and Central Asian governments agreed to expand overland corridors and increase direct flights to enhance trade and mobility (Reuters, 2025). Alongside traditional infrastructure, Beijing has become increasingly involved in renewable energy: in mid-2025, multiple agreements were signed in Uzbekistan to construct solar and wind plants with a combined capacity exceeding 1,000 MW, reflecting China's growing role in the region's green transition (Central Asia Climate Information Portal, 2025)

Finally, China has been systematically expanding its soft power in Central Asia. Through the establishment of Confucius Institutes and scholarship programs, China has sought to cultivate cultural and educational influence. As of 2024, 14 Confucius Institutes are operating across the Central Asian region (Buyar, 2025).

U.S. and European Strategies

Although Western policies toward Central Asia have been framed rhetorically around values such as "democracy-building, human rights, and market economy" since the 1990s, in practice, these narratives have often been supplanted by concerns over energy security, regional stability, and efforts to limit Chinese and Russian influence. This dual structure constitutes one of the key factors explaining the West's limited influence, fragile legitimacy, and the prevailing mistrust it faces among regional governments.

Following the dissolution of the Soviet Union, U.S. assistance to the region was primarily channelled through USAID projects and democracy-focused NGO support initiatives. However, after the 2001 invasion of Afghanistan, the United States became a more visible actor in Central Asia, with the Manas Air Base in Kyrgyzstan symbolising its heightened security engagement. Nevertheless, the closure of the base in 2014 and the U.S. withdrawal from Afghanistan in 2021 resulted in a dramatic decline in American influence throughout the region (Côté, 2014).

Currently, among the tariffs imposed by the United States on Central Asia, exports from Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan face a baseline tax of 10%, while Kazakhstan has been subject to a 25% customs duty since August 1. However, since most of Kazakhstan's exports to the U.S.—such as oil, uranium, and silver—are exempt, the main rate has affected only a relatively small share of shipments. Nevertheless, it has increased compliance costs for non-resource exporters and prompted the Kazakh government to lobby Washington to mitigate the impact. Across the region, the tariffs are unlikely to upend overall trade volumes, but they could redirect supply chains and financing, especially if the U.S. begins imposing 100% "secondary" tariffs targeting Russia-related dependencies (Abuova, 2025).

These tariffs, while economically limited in their direct impact, underscored a shift in U.S. strategy: rather than shaping the region's development with new initiatives, Washington has increasingly positioned itself as a reactive power, seeking to constrain rival influence through punitive measures. For Central Asian states, particularly Kazakhstan, the U.S. approach reinforced the rationale for pursuing "multi-vector" foreign policies—balancing relations with China, Russia, and Europe to mitigate the risks of overdependence on any single partner. In this sense, the United States remains a significant, yet predominantly negative, factor in regional calculations: less a proactive architect of integration than a constraint and counterweight in the emerging multipolar order.

For its part, the European Union long approached Central Asia as a low-profile development actor. However, in the aftermath of Russia's invasion of Ukraine, the EU significantly intensified its engagement with the region in an effort to reduce its energy dependency on Moscow. Under the Global Gateway program, the EU signed multilateral agreements with Kazakhstan and Uzbekistan, focusing on energy efficiency, water management, and digitalisation. Additionally, through its 79-Point Central Asia Action Plan, the EU aims to increase trade with the region by 50% and triple renewable energy investments by 2030 (Council of the European Union, 2025).

Following the military coup in Niger in July 2023, France lost its second-largest uranium supplier. Consequently, France, as the world's leading uranium exporter, turned its attention to Kazakhstan, which accounts for 40% of global uranium production. In this context, following President Emmanuel Macron's 2023 visit to Kazakhstan, the French state energy company Orano launched a new uranium mining project in the Stepnogorsk region (Yüksel, 2023).

Finally, the Samarkand Summit held in April 2025 marked a significant step toward deepening economic and strategic cooperation between Europe and Central Asia. During the summit, a €12 billion fund was established to support infrastructure modernisation, renewable energy investment, digital transformation, and sustainable development projects. The fund is expected to prioritise initiatives aimed at modernising transport corridors, expanding renewable energy capacity, and strengthening regional integration (Mikhailidi, 2025).

(Uzbek Prime Ministry - Anadolu Agency)

Regional Powers' Strategic Dynamics

Beyond traditional major players such as China, Russia, the United States, and Europe, Central Asia has increasingly attracted the attention of emerging regional powers. Countries like Türkiye, Iran, and the Gulf states are seeking to establish a foothold in the region for various reasons, including historical ties, cultural affinities, energy security, and strategic positioning. These new actors often engage with Central Asia through more flexible, targeted, and bilateral relations, deepening the region's complex geopolitical landscape without necessarily operating under the shadow of larger powers.

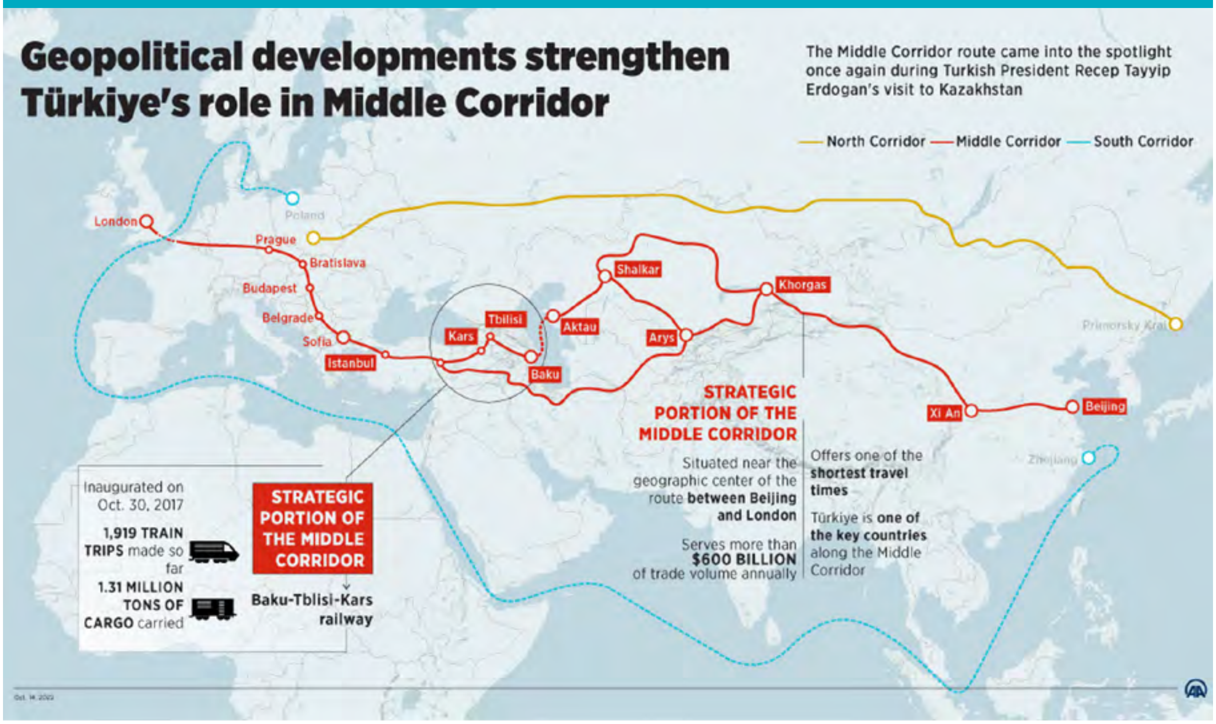
Türkiye was among the first countries to recognise the independence of Central Asian states in 1991, establishing special ties with Kazakhstan, Kyrgyzstan, Uzbekistan, and Turkmenistan based on cultural and linguistic commonalities. Since the 2010s, these relations have been institutionalised through structured regional cooperation models. In 2021, the Organisation of Turkic States (OTS) evolved into a formal structure, aiming to enhance political coordination and develop common platforms in areas such as defence, education, digital transformation, and transportation (Sherstyukov, 2024).

Türkiye's foreign policy toward Central Asia is largely shaped by development diplomacy, cultural engagement, and logistical connectivity initiatives such as the "Middle Corridor" strategy. This approach positions Central Asia as a key transit hub between China's Belt and Road Initiative and Europe, offering a geostrategic alternative that bypasses Russia.

Iran, on the other hand, continues to exert cultural influence in Persian-speaking countries like Tajikistan while simultaneously seeking to expand energy and logistics cooperation with Turkmenistan and Kazakhstan. However, Iran's influence remains constrained due to Western sanctions and domestic economic instability. As a result, Tehran's engagement is typically limited to cultural diplomacy and bilateral energy agreements (Umarova, 2024).

Recent developments, however, point to Tehran's efforts to diversify its regional role. In early 2025, Turkmenistan, Iran, and Türkiye finalised an arrangement for the transit of Turkmen gas to Türkiye via Iranian territory, providing a pragmatic bypass of Russian-controlled routes ((İletişim Başkanlığı, 2025). In addition, a new Xi'an–Tehran rail

Figure 3. The Middle Corridor route (Anadolu Agency, 2022)



(TUR Presidency/Murat Kula - Anadolu Agency)

link inaugurated in May 2025 significantly reduced transit times compared to maritime alternatives, and Tehran signalled plans for an Iran–Afghanistan–China corridor that could link with Central Asian transport hubs. Parallel to these initiatives, Iran has also advanced talks with Kazakhstan on the eastern branch of the International North–South Transport Corridor, further embedding Central Asia into Gulf and Indian Ocean trade networks (Terner, 2025).

The Gulf Cooperation Council (GCC) countries have also demonstrated growing interest in Central Asia by investing in local development projects and providing humanitarian aid. Saudi Arabia, Qatar, and the United Arab Emirates have become increasingly active in the region, driven by factors such as energy security, economic diversification, investment opportunities, security cooperation, and geopolitical ambition. The Gulf monarchies view Central Asia as a region where they can extend their geopolitical reach. Through establishing diplomatic relations, participating in multilateral forums, and offering development assistance, they aim to strengthen their presence in a region historically dominated by Russia and China. According to RISE Research, venture capital investments from the UAE in Central Asia reached $96 million in 2024, marking a 7% increase compared to 2023. Additionally, the Islamic Development Bank (IsDB) has financed $160.25 million for education projects in Uzbekistan and provided $129.11 million for three projects in Kyrgyzstan in the fields of agriculture, energy, and education (Zhanturina, 2025).

Local Dynamics and Points of Resilience

The multi-vector balancing strategies adopted by the Central Asian states in foreign policy are not merely a reflection of geopolitical preferences, nor are these states passive actors moving exclusively in line with the visions imposed by external powers. Rather, their foreign policy choices are intimately linked to domestic political dynamics, regime security, social stability, and elite consolidation. In this regard, each country has developed its own "points of resilience"—structures and reflexes deemed critical for the sustainability of the regime—rooted in their unique historical and socio-political contexts.

Kazakhstan, as the region's largest economy and most institutionalised state, possesses the greatest capacity to pursue a diversified foreign policy. Nonetheless, the Zhanaozen protests of 2022 exposed persistent socio-economic inequalities, elite distrust, and underlying social vulnerabilities. In the realm of foreign affairs, Kazakhstan continues to maintain a delicate balance between China, the West, and Russia; it has expanded institutional cooperation with the Organisation of Turkic States and the European Union, sustained Belt and Road Initiative (BRI) projects with China, and preserved military ties with Russia (Yüksel, 2023).

Since Shavkat Mirziyoyev assumed office in 2016, Uzbekistan has embarked upon a relative opening process characterised by anti-corruption initiatives, the promotion of the private sector, and improvements in cross-border relations. The country has established new channels of dialogue with key actors such as China, Türkiye, the European Union, and the Gulf states. Moreover, by hosting the EU-Central Asia Summit in Samarkand in 2025, Uzbekistan has further bolstered its emerging profile as a regional mediator (European Commission, 2025).

Despite being home to the most institutionalised multi-party political system in Central Asia, Kyrgyzstan continues to experience frequent episodes of regime crises and elite fragmentation. Power transitions in 2005, 2010, and 2020 have underscored the fragility of regime security. Furthermore, tensions with Tajikistan over border disputes escalated into violent confrontations in 2021 and 2022 (Al Jazeera, 2022). In June 2025, the Kyrgyz parliament adopted new legislation requiring all media outlets to register with state authorities, expanding government control over the press and raising serious concerns about freedom of expression. This development highlighted the persistent fragility of democratic institutions and the regime's reliance on restrictive measures to manage dissent (Putz, 2025).

Beyond regime structures, symbolic transformations in the public sphere have also become part of the resilience narrative. In June 2025, authorities in Kyrgyzstan's southern city of Osh removed the country's largest Lenin statue, signalling a gradual but notable shift away from the visible remnants of the Soviet legacy (BBC News, 2025). The act not only carried symbolic weight in redefining collective memory but also underscored the reorientation of national narratives toward greater autonomy and cultural self-definition.

Turkmenistan and Tajikistan, in contrast, represent the region's most closed political models, marked by dynastic succession and the pervasive presence of repressive security apparatuses.

All things considered, while Central Asian regimes distinguish themselves through diversified foreign policy initiatives and major infrastructure investments, their domestic political environments remain characterised by high degrees of fragility and limited institutional adaptability. Political reforms are frequently deferred due to prevailing security concerns, societal demands are confined to narrowly defined spaces of representation, and regime legitimacy is often sustained through external support mechanisms.

Conclusion: Conflicting Visions and the Strategic Crossroads of Central Asia

Central Asia has increasingly emerged as a region of strategic significance due to its geopolitical fluidity, abundant energy resources, and youthful demographic structure. China's Belt and Road Initiative (BRI), Türkiye's Middle Corridor strategy, the European Union's Global Gateway program, and Russia's Eurasian Economic Union (EAEU) project each offer distinct development visions for the region. While these initiatives collectively promote regional connectivity and economic integration, they simultaneously redraw the invisible boundaries of geopolitical competition.

Launched in Kazakhstan in 2013, China's BRI positions Central Asia at the heart of a land-based trade corridor connecting China to Europe. However, many of the projects initiated under the BRI framework operate on a "debt-for-infrastructure" model, creating potential risks of debt dependency, particularly for low-income countries such as Tajikistan and Kyrgyzstan. Additionally, the expansion of digital surveillance infrastructures under Chinese initiatives has generated new vulnerabilities in the realms of data security and digital sovereignty.

By contrast, Türkiye's Middle Corridor strategy presents not an alternative but a complementary—and arguably more autonomous—route to China's BRI. Promoted as the shortest pathway linking China to Europe via the Baku-Tbilisi-Kars railway and the Caspian Sea crossing, the Middle Corridor is further reinforced through institutional mechanisms such as the Organisation of Turkic States (OTS). Beyond economic collaboration, Türkiye's approach encompasses cultural and political convergence, offering the Central Asian countries a model grounded in shared historical narratives, mutual recognition, and cultural affinity. In this context, Türkiye's vision is perceived as more humane and egalitarian compared to China's more technical and transactional engagement.

The European Union, through its 2021 Global Gateway initiative, has redefined its strategy towards Central Asia by proposing a model of "normative development" centred on sustainability, digital transformation, renewable energy transitions, and the promotion of human rights. Following the Russia-Ukraine war, the region has gained renewed importance for the EU's energy diversification efforts. Nevertheless, the EU's operational effectiveness remains limited compared to China and Türkiye, and its normative demands risk generating unease among the region's authoritarian-leaning governments.

Russia, as the principal successor of the Soviet Union, continues to maintain political, economic, and cultural influence in Central Asia. Through the Eurasian Economic Union, Russia offers advantages such as customs union benefits and labour mobility while also preserving control over key energy infrastructures. Moreover, events such as the 2022 intervention in Kazakhstan demonstrate Russia's willingness to exert military influence when necessary. However, the sanctions imposed on Russia following its invasion of Ukraine have significantly weakened Moscow's capacity to sustain regional integration.

At the same time, recent developments suggest that Russia's position may evolve further. Should Moscow emerge from the war in Ukraine with strategic gains, its ability to exert pressure on Central Asian states—both economically and politically—could intensify. Such a scenario would reinforce Russia's role as a coercive power in the region, compelling local governments to navigate an even narrower space for multi-vector balancing.

Similarly, the European Union's financial commitments, while welcomed, come with normative strings attached. In exchange for multi-billion-euro investment packages, Brussels has signalled expectations for reforms in human rights and rule of law. This dynamic may confront authoritarian-leaning regimes with a delicate dilemma: accept normative concessions to secure vital funding, or resist at the cost of losing access to capital needed for infrastructure and energy transitions.

In sum, Central Asia is navigating among competing visions of development and integration offered by four major external powers. These engagements sometimes manifest as complementary collaborations but at other times exacerbate geopolitical fault lines. China's financial power, Türkiye's cultural proximity, the EU's institutional frameworks, and Russia's historical networks coexist as overlapping spheres of influence rather than mutually exclusive alternatives. Yet this multifaceted connectivity also restricts the strategic autonomy of Central Asian states, increasingly subjecting them to complex external pressures.

Looking ahead, the future of Central Asia will be shaped by three interwoven trajectories: first, the rise of renewable energy and digital infrastructure as new arenas of competition and cooperation; second, the region's capacity to institutionalise resilience through inclusive governance and diversified partnerships; and third, the ability of societies to redefine identity and political legitimacy in the shadow of great power rivalries. The interplay between external ambitions and internal fragilities will determine whether Central Asia becomes a laboratory for sustainable multipolarity or remains a battlefield of competing hegemonies.

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