

GLOBAL FRAMES AND LOCAL REALITIES: HOW EXPERTS OUTSIDE AND INSIDE CENTRAL ASIA ASSESS THE REGION'S TRAJECTORY

Bauyrzhan Auken^{1*}
Aidar Kurmashev²

^{1*} Leading Expert of Asian Studies Department, KazISS under the President of the RK, Astana, Kazakhstan; e-mail: auken_b@kisi.kz, ORCID:0009-0004-7162-271X.

² Head of Asian Studies Department, KazISS under the President of the RK, PhD, Astana, Kazakhstan; e-mail: kurmashev_a@kisi.kz, ORCID:0000-0002-5953-6403.

<https://doi.org/10.52536/2415-8216.2025.113.4.006>

Abstract. This article offers a comparative analysis of how Central Asia is assessed by major global actors and by regional experts themselves. Drawing on fourteen policy reports published in 2025 by leading think tanks in the United States (US), the European Union (EU), China, India, and the United Kingdom (UK), as well as two expert surveys conducted by the Kazakhstan Institute for Strategic Studies (KazISS) in 2023 and 2025, the study reveals both convergences and divergences in strategic narratives. External assessments often frame Central Asia as a logistical corridor, energy supplier, and zone of geopolitical contestation, while regional experts emphasize internal vulnerabilities—such as water stress, infrastructure fragility, and resource dependency—as key development challenges. The study also examines indigenous analytical contributions from Central Asian platforms which articulate a distinctive epistemological perspective on sovereignty, diversification, and regional agency. By integrating external strategic visions with regional perceptions, the article argues that a nuanced understanding of Central Asia's trajectory requires attention not only to geopolitical interests.

Key words: *Central Asia, strategic narratives, expert survey, regional agency, infrastructure, green energy, geopolitical competition, regional epistemologies.*

**ЖАҒАНДЫҚ ЖАҚТАУЛАР ЖӘНЕ ЖЕРГІЛІКТІ ЖАҒДАЙ:
ОРТАЛЫҚ АЗИЯДАН ТЫС ЖӘНЕ ІШІНДЕГІ САРАПШЫЛАР
АЙМАҚТЫҢ ТРАЕКТОРИЯСЫН ҚАЛАЙ БАҒАЛАЙДЫ?**

Бауыржан Әукен^{1*}, Айдар Құрмашев²

^{1*} ҚР Президенті жанындағы ҚСЗИ Азиялық зерттеулер бөлімінің жетекші сарапшысы, Астана, Қазақстан; e-mail: auken_b@kisi.kz ORCID:0009-0004-7162-271X.

² ҚР Президенті жанындағы ҚСЗИ Азиялық зерттеулер бөлімінің басшысы, PhD, Астана, Қазақстан; e-mail: kurmashev_a@kisi.kz, ORCID:0000-0002-5953-6403.

Аңдатпа. Бұл мақалада ірі жаһандық ойыншылар мен аймақтық сарапшылардың Орталық Азияға берген бағасының салыстырмалы талдауы берілген. Америка Құрама Штаттарының, Еуропалық Одақтың, Қытайдың, Үндістанның және Ұлыбританияның жетекші сараптамалық орталықтары 2025 жылы жариялаған он төрт аналитикалық баяндамаға, сондай-ақ Қазақстанның стратегиялық зерттеулер институты 2023 және 2025 жылдары жүргізген екі сараптамалық сауалнамаға сүйене отырып, зерттеу стратегиялық нарықтардағы ұқсастықтарды да, алшақтықтарды да көрсетеді. Сыртқы бағалаулар Орталық Азияны логистикалық дәліз, энергия жеткізушісі және геосаяси бәсекелестік аймағы ретінде жиі көрсетеді, ал аймақтық сарапшылар су тапшылығы, нәзік инфрақұрылым және ресурстарға тәуелділік сияқты ішкі осалдықтарды дамудың негізгі міндеттері ретінде атап көрсетеді. Зерттеу сонымен қатар егемендікке, әртараптандыруға және аймақтық агенттікке қатысты нақты гносеологиялық перспективаны тұжырымдайтын Орталық Азия платформаларында ұсынылған аналитикалық материалдарды зерттейді. Сыртқы стратегиялық перспективаларды аймақтық түсініктермен біріктіре отырып, бұл мақалада Орталық Азияның даму траекториясын мұқият түсіну тек геосаяси мүдделерге ғана емес, сонымен бірге аймақтың қалыптасып келе жатқан жаһандық тәртіптегі өз орнын қалай түсінетініне де назар аударуды талап етеді.

Түйін сөздер: *Орталық Азия, стратегиялық баяндаулар, сараптамалық сауалнама, аймақтық агенттік, инфрақұрылым, жасыл энергетика, геосаяси бәсеке, аймақтық эпистемологиялар.*

ГЛОБАЛЬНЫЕ РАМКИ И МЕСТНЫЕ РЕАЛИИ: КАК ЭКСПЕРТЫ ЗА ПРЕДЕЛАМИ И ВНУТРИ ЦЕНТРАЛЬНОЙ АЗИИ ОЦЕНИВАЮТ ТРАЕКТОРИЮ РАЗВИТИЯ РЕГИОНА

Бауыржан Ауен^{1*}, Айдар Курмашев²

^{1*} Ведущий эксперт Отдела азиатских исследований КИСИ при Президенте РК, Астана, Казахстан; e-mail: auken_b@kisi.kz, ORCID:0009-0004-7162-271X.

² Руководитель Отдела азиатских исследований КИСИ при Президенте РК, PhD, Астана, Казахстан; e-mail: kurmashev_a@kisi.kz, ORCID:0000-0002-5953-6403.

Аннотация. В данной статье представлен сравнительный анализ оценок Центральной Азии основными мировыми игроками и региональными экспертами. Опираясь на четырнадцать аналитических докладов,

опубликованных в 2025 году ведущими аналитическими центрами США, Европейского союза, Китая, Индии и Великобритании, а также на два экспертных опроса, проведенных Казахстанским институтом стратегических исследований в 2023 и 2025 годах, исследование выявляет как сходства, так и расхождения в стратегических нарративах. Внешние оценки часто представляют Центральную Азию как логистический коридор, поставщика энергии и зону геополитической конкуренции, в то время как региональные эксперты подчеркивают внутренние уязвимости, такие как дефицит воды, хрупкость инфраструктуры и зависимость от ресурсов, как ключевые проблемы развития. В исследовании также рассматриваются аналитические материалы, представленные на центральноазиатских платформах, которые формулируют особую эпистемологическую перспективу суверенитета, диверсификации и регионального агентства. Объединяя внешние стратегические видения с региональными представлениями, в статье утверждается, что для детального понимания траектории развития Центральной Азии необходимо уделять внимание не только геополитическим интересам, но и тому, как регион осмысливает свое место в формирующемся мировом порядке.

***Ключевые слова:** Центральная Азия, стратегические нарративы, экспертный опрос, региональное агентство, инфраструктура, зеленая энергетика, геополитическая конкуренция, региональные эпистемологии*

Introduction

Over the past two decades, Central Asia has undergone a quiet yet consequential transformation. No longer perceived as a passive geopolitical periphery shaped by the legacies of empire and the rivalries of global powers, the region is increasingly asserting itself as a nexus of strategic connectivity, resource wealth, and multilateral experimentation. The war in Ukraine, the U.S. withdrawal from Afghanistan, and mounting economic, energy, and transport-logistical challenges have redefined the role of Central Asia in global policy discourses. These developments have triggered a renewed wave of engagement from both traditional and emerging external actors.

This growing interest has produced a proliferation of policy documents and strategic assessments by think tanks across the US, the EU, China, India, UK. These external narratives often reflect geopolitical imperatives, development agendas, and normative aspirations that may or may not align with regional priorities. At the same time, voices from within Central Asia - scholars, policy practitioners, and strategic institutions - have offered increasingly mature and diverse evaluations of the region's risks, opportunities, and long-term trajectory.

This article seeks to bridge the analytical divide between external frames and internal perspectives. It does so by systematically comparing recent assessments from leading international think tanks published in 2025 with the findings of two rounds of expert surveys conducted in 2023 [1] and 2025 [2] by the KazISS. By juxtaposing global strategic visions with regionally grounded perceptions, the article aims to uncover both convergences and dissonances in how Central Asia's trajectory is understood.

The analysis proceeds in four stages. First, it examines the strategic outlooks on Central Asia articulated by major external actors, including the US, the EU and

selected European states, China, India, and the UK. Second, it turns to regional perspectives, drawing on original expert survey data to highlight evolving views on risks, cooperation, external partnerships, and institutional design. Third, the article identifies points of alignment and divergence between these global and local narratives. Fourth, it explores how regional think tanks and scholars articulate strategic discourses about Central Asia on their own terms. Finally, it reflects on what these insights imply for the future agency of Central Asian states in a multipolar world order.

By integrating external and internal assessments, this study contributes to a more nuanced understanding of the region's contested strategic identity - as both an object of geopolitical interest and a subject of regional initiative. It highlights the need to treat Central Asia not merely as a space of competition among great powers, but as an increasingly articulate actor in its own right, with distinct priorities and evolving capacities for regional cooperation and global engagement.

Methodology

This article combines qualitative and survey-based methods to compare how Central Asia is assessed by external strategic actors and regional experts. The study draws on two main types of sources: (1) recent policy papers and strategy reports published by leading international think tanks in 2025, and (2) original expert surveys conducted in 2023 and 2025 by the KazISS.

The analysis of external perspectives is based on 14 policy papers and reports produced in early 2025 by major think tanks from the US, EU member states, China, India, and the UK. These institutions were selected based on their recognized expertise in international affairs and their active engagement with Central Asian topics. The reports cover a range of thematic areas - including connectivity and infrastructure, energy security, critical raw materials, military balance, regional stability, and geopolitical competition - offering a comprehensive overview of how key global actors view the region's current trajectory and strategic relevance.

While the documents vary in format and institutional focus, they share a common temporal frame (Q1, Q2 2025) and are comparable in terms of analytical intent. Most of them were published in English, with the exception of one French-language report; all were reviewed in their original versions. The think tanks selected include the Caspian Policy Center (CPC), Atlantic Council (AC), Central Asia-Caucasus Institute (CACI) (United States); Stiftung Wissenschaft und Politik (SWP), Friedrich-Ebert-Stiftung (FES) (Germany); Institut français des relations internationales (IFRI), Institut de relations internationales et stratégiques (IRIS) (France); Clingendael (Netherlands); International Institute for Strategic Studies (IISS), Bloomsbury Intelligence and Security Institute (BISI), SOAS (United Kingdom); Shanghai Institutes for International Studies (SIIS) (China); and the Ananta Centre (AC) (India).

In addition to surveys, the article incorporates original research outputs and policy commentary produced by leading analytical institutions within Central Asia. These include the Institute for Advanced International Studies (IAIS) (Uzbekistan) and the Institute for War and Peace Reporting (IWPR). The selected materials - authored by experts from Kyrgyzstan, Tajikistan, and Uzbekistan - offer insight into how regional analysts assess geopolitical risks, environmental policy innovations, and the implications of global power competition from a local standpoint. This dimension, presented in the section Regional Epistemologies, expands

the empirical base of the study and enables a more grounded interpretation of strategic discourses generated within the region itself.

To assess perspectives from within the region, the article draws on the results of two structured surveys conducted by the KazISS via Google Forms. The first survey was held from January 20 to January 26, 2023, among 39 experts who participated in the high-level forum “Central Asia: Images of the Future.” The second survey took place between January 22 and February 17, 2025, and involved 66 experts from Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan. The expert pool included researchers, policy analysts, and civil society representatives with recognized expertise in regional affairs.

The surveys consisted of multiple-choice and open-ended questions covering six core domains:

- Perceived risks to regional development;
- Priority areas for intra-regional cooperation;
- Sectors with high growth potential;
- Preferred external economic partners;
- Assessment of institutional integration;
- Most likely trends for Central Asia by 2030.

Respondents were asked to select multiple items per question, allowing for a ranked overview of dominant concerns and expectations. Comparisons across the 2023 and 2025 datasets reveal changes in expert perceptions over time, offering insight into the evolving priorities of regional stakeholders.

Discussion and results

The article employs a thematic comparative framework. First, each group of external assessments is analyzed on its own terms, highlighting core narratives, strategic assumptions, and policy recommendations. Second, the internal perspective is reconstructed through expert survey data, emphasizing regional priorities, perceived threats, and institutional preferences. Finally, the article cross-references the two dimensions to identify key areas of convergence (e.g., shared concerns over infrastructure and water management) and divergence (e.g., differing views on digitalization, green transition, and the role of external actors).

By aligning discourse analysis with empirical survey data, the article seeks to provide a more integrated understanding of how Central Asia’s future is framed, imagined, and acted upon - both from within and without.

The US: Competing for Relevance Through Connectivity, Resources, and Stability. Recent U.S. strategic assessments reflect a shift from peripheral attention toward more proactive engagement in Central Asia, shaped by the U.S. withdrawal from Afghanistan, the Russia–Ukraine war, and intensifying U.S.–China rivalry. Across three major 2025 policy papers, Central Asia is framed as a geostrategic corridor, a resource hub, and a fragile frontier requiring sustained diplomatic attention.

Infrastructure Diplomacy and Strategic Reorientation. A key narrative across U.S. analyses is the reconfiguration of Central Asia’s connectivity landscape. The CPC promotes the “Trans-Caspian trajectory” as the backbone of a new American regional approach, in which the Middle Corridor becomes a geopolitical alternative to Russian and Chinese-controlled routes. This includes developing infrastructure links between Kazakhstan, the Caspian Sea, and the South Caucasus, with the ul-

timate aim of linking Central Asia directly to European markets [3]. Significantly, the report proposes expanding the C5+1 diplomatic platform to include Armenia, Azerbaijan, and Georgia - thereby integrating Central Asia and the Caucasus into a broader regional framework under U.S. strategic influence.

Meanwhile, the AC highlights legislative and economic mechanisms to unlock trade and investment potential, especially the repeal of the Jackson-Vanik amendment, which hampers normalized trade relations with Kazakhstan and Uzbekistan. The authors argue that this legal reform could serve as a gateway to deeper economic engagement [4]. Both Kazakhstan and Uzbekistan are positioned as gateway states: Kazakhstan due to its mineral wealth and logistical potential via the Middle Corridor, and Uzbekistan for its ambitions to become a regional IT hub and its openness to WTO accession.

Critical Minerals and Economic Security. A consistent emphasis on rare earth elements and energy security underscores the American pivot toward geoeconomic competition. With China controlling over 85% of global rare earth processing, U.S. policy documents advocate strategic partnerships with Kazakhstan and Uzbekistan to diversify access to these essential materials. Kazakhstan is described as a particularly promising partner due to its critical mineral reserves and willingness to engage in multi-vector foreign policy. Uzbekistan's reform-oriented agenda and pursuit of a digital economy make it another anchor state in Washington's regional calculus.

Additionally, U.S. think tanks suggest targeted infrastructure investments to compete with China's Belt and Road Initiative. In particular, Washington is encouraged to support the development of a trans-Caspian gas pipeline from Turkmenistan to Azerbaijan, providing a non-Russian route for Turkmen gas exports to Europe. This reflects the growing U.S. interest in using energy corridors to reshape Eurasian strategic alignments.

Stability, Governance, and Security Risks. In contrast to the forward-leaning tone of the CPC and AC, the CACI presents a cautionary assessment of regional volatility. Drawing on the post-2022 landscape, the report identifies multiple conflict flashpoints - from elite fragmentation in Kazakhstan to center-periphery tensions in Tajikistan and Uzbekistan, and inter-state border disputes between Kyrgyzstan and Tajikistan [5]. These trends are interpreted as symptoms of deeper structural weaknesses: weak institutions, hybrid political economies, and overdependence on external actors, especially Russia.

However, the report also notes resilience factors, particularly in Kazakhstan and Uzbekistan, which are seen as outliers progressing toward modern governance and economic diversification. The revival of regional formats and increasing institutional cooperation are acknowledged as significant counterweights to internal and external instability. Overall, the analysis paints a dual picture: Central Asia's future hinges on continued reform and the consolidation of regional solidarity, while its vulnerabilities remain potent in the absence of deeper governance transformation.

Strategic Implications and Policy Recommendations. All three reports call for a more institutionalized and multidimensional U.S. strategy in Central Asia. Key proposals include appointing a special U.S. envoy for Central Asia and the Caucasus, shifting regional oversight from CENTCOM to EUCOM to align the region with the European security framework, and increasing investments in infrastructure, energy, and education. Crucially, U.S. policy is advised to pair strategic

ambition with respect for regional agency, acknowledging that states such as Kazakhstan will maintain ties with Russia and China while still seeking diversified partnerships.

Collectively, these assessments signal a broader shift: Central Asia is no longer treated as a peripheral buffer but as a competitive arena shaped by connectivity, resource flows, and geopolitical rivalry.

The EU: Strategic Intentions, Institutional Inertia, and the Quest for Relevance in Central Asia. European engagement with Central Asia is marked by a growing recognition of the region's strategic relevance - both as a source of critical materials and as a pivotal node in the global energy transition. However, as recent 2025 reports from leading European think tanks show, this awareness is often tempered by institutional caution, fragmented efforts, and competition from more agile external actors. German, French, and Dutch perspectives reflect a common tension between Europe's normative aspirations and its practical limitations in Central Asia's contested geopolitical environment.

Competing for Green Energy Influence. The Gulf–China–Central Asia Triangle. A central theme in Germany's recent strategic thinking is the geopolitical implications of Central Asia's renewable energy transformation. According to a January 2025 report from the SWP, the green energy sector in Kazakhstan and Uzbekistan is increasingly shaped by a growing alliance between China and the Gulf States. Chinese firms provide infrastructure and capital, while Gulf actors such as ACWA Power contribute financing and technological expertise - often in hybrid ventures that blur geopolitical lines [6].

The report emphasizes that while Central Asian states aim to reduce dependence on both Russia and China, their financial and technological gaps make them vulnerable to external conditionalities. Kazakhstan and Uzbekistan, for instance, have set ambitious renewable energy targets - 35% and 40% respectively - but their implementation depends heavily on foreign investment. The EU's visibility in this sector remains limited, and without a significant policy shift, Europe risks losing ground in shaping the region's green transition.

Critical Raw Materials. Structural Barriers to Strategic Convergence. The FES's May 2025 report underlines the strategic potential - and chronic underperformance - of EU–Central Asia cooperation on critical materials. While the EU's Global Gateway initiative and its strategic communications stress the importance of Central Asia for Europe's clean energy supply chains, actual engagement has been slow, risk-averse, and procedurally burdened [7].

Local stakeholders perceive European actors as reliable but inflexible, hampered by bureaucracy, visa barriers, and weak mobility frameworks for scientists and entrepreneurs. Meanwhile, China's more transactional and centralized approach allows it to dominate both extraction and processing activities. The report suggests a paradigm shift is required: from waiting for regional conditions to mature, to actively co-shaping institutional frameworks and technological ecosystems in partnership with Central Asian states.

The Caspian as an Energy Hub. Strategic Potential, Logistical Constraints. France's approach, as reflected in a 2025 report by IFRI, focuses on the Caspian Sea as a potential energy corridor for Europe. Following the EU's decoupling from Russian energy, Kazakhstan, Azerbaijan, and Turkmenistan have become increasingly central to the European diversification agenda. However, geopolitical rival-

ries - especially with Russia and Iran - combined with infrastructural bottlenecks hinder the realization of a secure trans-Caspian supply chain [8].

Notably, the report underscores Kazakhstan's role as a linchpin in both fossil fuel and renewable energy strategies. The country's partnership with German firms to develop a hydrogen hub exemplifies emerging energy synergies. Still, high transport costs, environmental concerns, and the classification of uranium as a hazardous good complicate effort to redirect supply chains away from Russia. Without more robust logistical and political coordination, the Caspian energy corridor remains a vulnerable conduit rather than a stable hub.

Nuclear Energy and Geopolitical Balancing. Another facet of European strategic interest, highlighted in a May 2025 IRIS report, is the region's role in the global nuclear energy renaissance. Kazakhstan and Uzbekistan are not merely uranium exporters; they are attempting to move up the value chain, establishing themselves as strategic partners in civil nuclear development. France plays a key role through partnerships with Kazatomprom and Navoiyuran, while Germany has invested heavily in lithium extraction as part of its broader resource diversification efforts [9].

Yet infrastructure gaps, logistical hurdles, and dependency on Russian processing facilities constrain regional autonomy. Moreover, geopolitical decisions - such as Kazakhstan's upcoming selection of a nuclear reactor provider - are increasingly seen as indicators of broader strategic alignment. The EU's involvement in supporting regional nuclear cooperation platforms, joint safety standards, and fuel cycle governance could be a decisive factor in shaping this alignment.

Normative Commitments and Institutional Gaps. Beyond sectoral policies, a broader critique of EU engagement is offered in the Clingendael Institute's 2025 report. It acknowledges recent improvements in regional governance and security but warns that the EU's long-term presence is undermined by institutional asymmetries and diplomatic underrepresentation. Most EU member states maintain embassies only in Kazakhstan, with limited outreach to other republics [10].

The report recommends convening a long-overdue EU–Central Asia summit, expanding bilateral and regional education exchanges, and aligning member-state initiatives under a unified EU framework. It highlights green hydrogen, tourism, and rule-of-law cooperation as sectors where the EU maintains clear comparative advantages.

It further calls for strengthening intra-regional academic mobility and supporting education initiatives within Central Asia, arguing that investment not only in elite partnerships but also in vocational and secondary education would enhance the EU's normative influence across generations and institutions.

The UK: Security Recalibration, Economic Disruptions, and Strategic Observations. British analytical perspectives on Central Asia, as reflected in recent 2025 reports by the IISS, the BISI, and the SOAS, underscore the region's evolving strategic environment. While not presenting a unified policy agenda, these reports offer a composite view of Central Asia as a space of recalibrated security dependencies, contested economic alignments, and deepening Chinese influence - all observed from a British vantage point that blends geopolitical analysis with institutional detachment.

Post-Ukraine Strategic Drift. The IISS Military Balance 2025 offers a sobering assessment of Russia's declining capacity to project power in Central Asia. Protracted warfare in Ukraine and the effects of Western sanctions have dimin-

ished Moscow's material and symbolic authority across the former Soviet periphery. As a result, Central Asian states are reconfiguring their security partnerships, increasingly engaging with Turkey and Azerbaijan, while simultaneously broadening technological cooperation with European states [11].

Though formal military links with Russia persist - such as Kazakhstan's continued procurement of Su-30SM fighter jets - there is a visible diversification of defense ties. For instance, the 2024 Birlestik military exercises, involving all five Central Asian republics plus Azerbaijan and notably excluding Russia and China, signal a growing regional inclination toward autonomous security formats. This marks a significant departure from CSTO-dominated paradigms and points to Central Asia's search for post-Russian strategic pluralism.

U.S. Tariffs and the Symbolic Geopolitics of Economic Trust. The April 2025 BISI report shifts attention to trade policy, analyzing the impact of newly imposed U.S. tariffs on Central Asian states. The imposition of 27% tariffs on Kazakh imports - substantially higher than the 10% levied on other regional economies - has had limited economic impact due to the nature of Kazakhstan's U.S.-bound exports (primarily oil, uranium, and ferroalloys). However, the symbolic consequences are significant [12].

The report argues that such trade measures - irrespective of their practical effects - undermine trust in U.S. reliability as an economic partner. In a region that already leans toward multi-vector diplomacy, the perceived volatility of American policy may inadvertently strengthen China's appeal as a stable, albeit more transactional, alternative. The EU, meanwhile, is presented as a potential beneficiary of this disillusionment - especially if it can offer predictability in critical raw materials partnerships under frameworks like Global Gateway.

More broadly, BISI identifies a feedback loop: external uncertainty stimulates internal regionalism. The report cites the growing institutionalization of Central Asian cooperation - such as the Kyrgyz-Tajik-Uzbek border infrastructure agreements - as evidence that intra-regional connectivity is being accelerated not only by internal logic but also by disillusionment with external actors.

China's Strategic Reengineering of Central Asia's Energy Landscape. Complementing the geopolitical and economic focus of the IISS and BISI reports, the SOAS China Institute provides a sectoral deep dive into energy, highlighting China's expansive role in reshaping Central Asia's energy future - particularly in Uzbekistan. The study reveals how Chinese companies now constitute 20% of all foreign enterprises in the country and are central to gas infrastructure projects that redirect energy flows eastward, further marginalizing Russia's historic role as a transit hub [13].

The report details how Chinese investment is not only altering physical infrastructure, but also recalibrating elite preferences. Uzbekistan's leadership now views Chinese partnerships as more predictable and less politicized than Russian alternatives - exemplified by past pricing disputes with LUKOIL. However, the authors warn of trade-offs: while Chinese-backed pipelines increase export revenues, they also risk exacerbating domestic energy shortages, particularly during winter, with significant social consequences.

Simultaneously, China is expanding its footprint in Uzbekistan's green energy sector, financing solar and wind projects that offer both environmental and strategic benefits. Yet the socio-economic impact of these projects remains limited. The

report cautions that without accompanying industrial policy or employment strategies, green energy cooperation risks becoming an elite-driven vector of dependence, rather than a lever of sustainable development.

Strategic Takeaways and British Implications. The British analytical perspective highlights three main trends. First, regional security is gradually decoupling from Russian strategic patronage, with consequences for NATO and EU defense planning across Eurasia. Second, Western economic credibility depends not only on investment volumes but also on policy consistency-gaps in predictability create openings for China. Third, Central Asia's energy transition represents both geopolitical realignment and a domestic social challenge that could deepen inequalities if poorly managed.

China and India: Strategic Convergence and Competitive Caution in Central Asia. The 2025 reports by the SIIS and the AC offer complementary yet contrasting insights into how Asia's two most prominent powers, China and India, conceptualize and act upon their interests in Central Asia [14]. While China is portrayed as a deeply embedded strategic actor seeking long-term institutional integration, India positions itself as a cautious and normative alternative - aspiring to relevance but limited by structural constraints.

China: From Security Stabilizer to Regional Architect. The SIIS report presents China's current posture in Central Asia as a maturing phase of what it terms "peripheral security management". According to this view, the region has witnessed growing political predictability since 2023, underpinned by domestic reforms in Kazakhstan and Uzbekistan, progress in border demarcation between Kyrgyzstan and Tajikistan, and declining popular unrest post-COVID. From Beijing's perspective, such trends reduce the likelihood of violent state failure and improve the operational environment for Chinese infrastructure, trade, and investment.

China's approach is framed as defensive but increasingly assertive. While early engagement focused on stabilizing Xinjiang's periphery and avoiding the spillover of terrorism, the report acknowledges a shift toward regional institution-building and strategic agenda-setting. Initiatives like the Belt and Road have not only deepened China's economic footprint but also created friction points: public backlash in Kazakhstan and Kyrgyzstan over land use, labor practices, and opaque deals reveal a growing "social fatigue" with Chinese expansionism - even as elites continue to view China as a vital partner.

Key vulnerabilities are identified in two domains: Afghanistan and transboundary water disputes. The instability emanating from Afghanistan, especially the potential infiltration of extremist fighters with battlefield experience, remains China's principal regional security concern. Water scarcity, worsened by climate change and unresolved upstream-downstream tensions, is seen as a latent conflict trigger that could destabilize China's western periphery if unmediated.

Yet the report also points to a paradox: while China gains influence as Russia declines and Western actors hesitate, it faces diminishing marginal returns. Increasing strategic rivalry in the region - with the U.S., EU, Turkey, and Gulf States expanding their presence - requires China to balance assertiveness with restraint. Infrastructure investments that once seemed purely economic now operate within a contested geopolitical matrix, demanding adaptive governance and softer diplomacy.

India: The Distant Balancer with Normative Appeal. India's analytical narrative, as presented by the AC, positions New Delhi as a latecomer in Central Asia

with distinct strategic appeal - but persistent limitations. India is portrayed as a “non-threatening partner” that offers an alternative to Chinese and Russian dominance by avoiding coercive diplomacy or extractive investment models. This normative advantage is reinforced by the absence of territorial disputes and India’s rhetorical commitment to sovereign development and connectivity [15].

India’s Central Asia policy is historically shaped by two vectors: the desire to counter China’s westward expansion and to mitigate the strategic effects of Pakistan’s influence in Afghanistan. However, the lack of direct land connectivity, delayed infrastructure projects like Chabahar Port, and limited institutional presence have curtailed India’s ability to project power or deepen trade.

The report frames China’s dominance as structural but fragile. It traces how Beijing’s shift from bilateral security cooperation to direct regional leadership - symbolized by the 2023 Xi’an “C+C5” summit and \$3.7 billion in new aid commitments - has altered regional dynamics. While effective in the short term, China’s strategy also creates political liabilities: from growing dependency risks for Central Asian states to rising anti-China sentiments that democratic actors like India can potentially leverage.

In contrast, India’s influence in the security domain remains minimal, though it has cautiously expanded soft power initiatives - academic exchanges, IT partnerships, and cultural diplomacy. Without major economic leverage or military presence, New Delhi remains an observer of geopolitical realignments rather than a central actor. Still, its image as a democratic and pluralistic state, together with its rising global stature through the G20 and BRICS, allows India to claim moral capital in regional diplomacy.

Strategic Convergence and Divergence. China and India offer contrasting models for Central Asia’s external engagement. China aims to set rules, expand corridors, and institutionalize its regional leadership, relying on large-scale infrastructure, energy projects, and material leverage. India emphasizes multipolarity and strategic autonomy-an approach that resonates with regional preferences but is constrained by limited connectivity and resources.

These differences imply a dual trajectory: China will remain the dominant actor in the short and medium term, while India’s strategic relevance may grow only gradually, as Central Asian states continue seeking a more balanced and diversified external alignment.

Regional expert assessments. In addition to external strategic visions, perspectives from within Central Asia shed light on the region’s evolving self-perceptions. Two expert surveys conducted by KazISS - from 20 to 26 January 2023 (39 respondents) and from 20 January to 17 February 2025 (66 respondents) - provide a comparative overview of key findings, capturing shifts in perceived risks, cooperation priorities, preferred external partners, and long-term regional expectations.

Heightened Concern over Resource Vulnerabilities. Between 2023 and 2025, the most pronounced shift in expert opinion concerns the growing importance of material and environmental risks. The share of respondents citing “resource deficit” as a key threat to regional development increased from 64.1% to 74.2%, reflecting the rising salience of water scarcity, energy insecurity, and climate-induced stress. Concerns over “dependency on raw materials and energy exports” also rose from 38.5% to 45.5%, signaling deeper awareness of structural economic constraints.

Meanwhile, the perceived threat of “external actors growing influence” declined

(53.8% to 45.5%), suggesting either greater acceptance of multi-vector engagement or increasing confidence in regional autonomy. Notably, risks tied to “low human capital quality” (56.4% to 34.8%) and “socioeconomic conditions” (51.3% to 42.4%) saw a substantial decrease, perhaps due to modest improvements in governance and education, especially in Kazakhstan and Uzbekistan.

Enduring Foundations of Regional Cooperation. Core areas of cooperation have remained stable. Nearly identical majorities in 2023 and 2025 (79.5% and 81.8%) prioritized coordination in water and energy management, underscoring the issue’s centrality to both security and development. Similarly, regional connectivity through transport corridors retained top priority (79.5% in 2023 and 71.2% in 2025), affirming the long-term relevance of infrastructure diplomacy.

At the same time, support grew for “joint industrial production” (33.3% to 45.5%) and “scientific-educational programs” (38.5% to 43.9%). This points to a strategic pivot from raw material dependency toward added value production and knowledge-based cooperation. Interest in tourism, agriculture, and human development declined slightly, possibly due to shifting expectations amid growing geopolitical uncertainty.

Preferred Growth Sectors: Infrastructure Over Innovation? When asked about future growth sectors, regional experts reaffirmed infrastructure as the leading engine of development, with support increasing from 69.2% to 74.2%. This emphasis aligns with broader global trends portraying Central Asia as a future transit hub. Yet, confidence in technological sectors appeared to wane: support for “digital finance” dropped sharply (46.2% to 25.8%), and for “green technologies” (61.5% to 43.9%). These shifts may reflect the gap between strategic rhetoric and operational capacity in the digital and green domains.

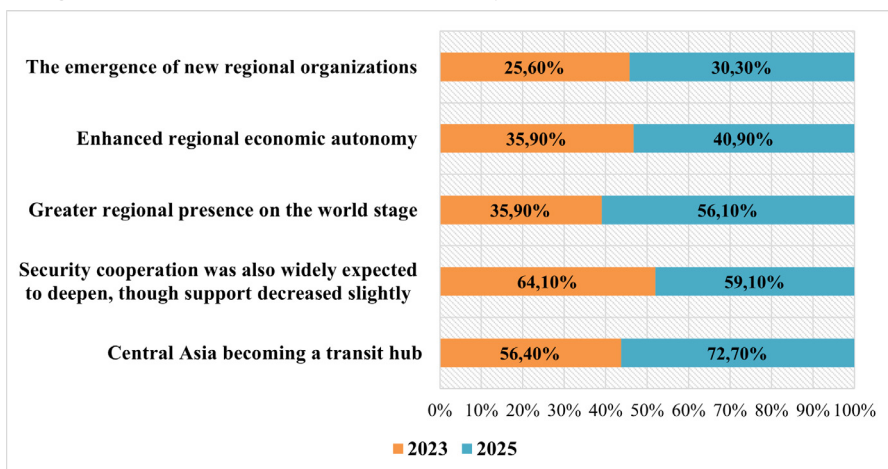
Shifting Geo-economic Preferences: China's Ascent, Turkey's Retreat. Between 2023 and 2025, regional perceptions of external partners shifted meaningfully. China strengthened its lead as the most important partner (84.6% to 92.4%), followed by notable gains for Russia (66.7% to 75.8%) and the EU (64.1% to 72.7%). The US also gained slightly (46.2% to 51.5%), despite simultaneous concerns over policy inconsistency.

In contrast, Turkey’s ranking fell sharply (71.8% to 48.5%), potentially indicating a recalibration of expectations around Ankara’s regional role. India’s rating declined even more steeply (41.0% to 24.2%), suggesting that normative appeal alone has not translated into strategic trust or economic presence.

Institutional Preferences: From Grand Designs to Sectoral Pragmatism. Assessments of regional institutionalization also evolved. In 2023, a slim majority (51.3%) advocated for the creation of a formal Central Asian organization. By 2025, support for this idea had dropped to 36.4%, while the share favoring sectoral institutionalization increased from 35.9% to 53.0%. This shift indicates a growing preference for flexible, functional cooperation mechanisms rather than comprehensive bureaucratic structures. Existing institutions were not widely seen as sufficient (only 7.6% in 2025 viewed them as adequate), nor were they seen as duplicative (1.5%).

Long-Term Outlook: Strategic Optimism with Structural Caution. When asked to project regional trends to 2030, experts expressed moderate optimism. The most widely expected developments were as following:

Figure 1. Please indicate the 5 most likely trends in Central Asia in 2030?



On the risk side, the intensification of competition for water emerged as a growing concern (41.0% to 54.5%), reflecting anxieties over environmental stress and resource-sharing. In contrast, expectations of political conflict within the region fell substantially (41.0% to 18.2%), perhaps indicating greater confidence in diplomatic maturity and crisis prevention mechanisms.

Overall, the 2025 survey suggests a region that is more confident, more pragmatic, and more committed to pursuing autonomous development through selective cooperation - yet still constrained by structural dependencies, regional asymmetries, and external volatility.

Convergences and Dissonances: Global Narratives vs. Regional Priorities.

The juxtaposition of global policy frames and internal expert assessments reveals both strategic alignments and critical mismatches. While certain thematic areas—such as infrastructure, resource governance, and connectivity—command broad consensus, others exhibit notable divergences. These gaps reflect differences in institutional priorities, risk perceptions, and geopolitical positioning between external actors and regional stakeholders.

Shared Priorities: Connectivity, Water-Energy Nexus, and Geo-economic Relevance. A strong area of convergence lies in the emphasis on connectivity and infrastructure development. Both external think tanks and regional experts identify transport corridors—particularly the Middle Corridor and trans-Caspian routes—as foundational to Central Asia’s regional integration and economic diversification. For example, U.S. policy reports highlight Kazakhstan’s role as a logistics hub linking Asia to Europe, while 74.2% of regional experts in 2025 cite infrastructure as the leading growth sector.

Similarly, water and energy cooperation appears as a shared concern. German and French think tanks (SWP, IFRI) stress the region’s green energy potential and its importance to global energy transitions, while over 80% of Central Asian experts identify water-energy coordination as the top priority for regional cooperation in both 2023 and 2025. Climate-related risks and transboundary resource governance are thus recognized across scales.

Finally, there is broad agreement on the region’s growing geo-economic signifi-

cance. External actors—especially from the EU, China, and the U.S.—increasingly see Central Asia as a strategic node in global supply chains, particularly for critical minerals and energy. This corresponds to expert views within the region, where China (92.4%), the EU (72.7%), and Russia (75.8%) are ranked among the most important partners, underscoring the region’s entanglement in multipolar competition for economic access.

Divergent Threat Perceptions: From Human Capital to Strategic Rivalry. Despite these areas of alignment, notable discrepancies emerge in threat perception and sectoral focus. Western reports—particularly from the U.S. and U.K.—tend to emphasize external threats such as Russian destabilization or Chinese economic dominance. In contrast, regional experts are increasingly concerned with resource-related and structural vulnerabilities. Between 2023 and 2025, “resource deficit” rose from 64.1% to 74.2% as the top perceived risk, whereas fears of “external influence” declined (53.8% to 45.5%).

This suggests a regional recalibration: rather than viewing global rivalry as the primary destabilizer, Central Asian experts focus on internal and environmental pressures, including the intensifying water crisis and infrastructure fragility. Likewise, while Western actors prioritize democratization, human rights, and digital finance as key leverage points, regional experts appear more cautious—support for digital finance as a growth sector fell sharply (46.2% to 25.8%) between 2023 and 2025, and the importance of human capital declined in the risk matrix.

Green Ambitions vs. Technological Pragmatism. Another divergence lies in the green transition narrative. EU strategies (e.g., SWP, FES, Clingendael) frame Central Asia as a vital partner in Europe’s decarbonization agenda, especially for green hydrogen and renewables. Yet enthusiasm for green technologies among regional experts declined from 61.5% in 2023 to 43.9% in 2025. While this may reflect concerns over feasibility, cost, and domestic capacity, it also highlights a mismatch between European normative agendas and regional absorptive realities.

Similarly, external advocacy for digitalization—especially in U.S. and Indian discourses—is not fully mirrored within the region. Interest in digital finance and information technologies has stagnated or declined in the expert surveys, suggesting either implementation fatigue or skepticism regarding short-term developmental gains from tech-oriented initiatives.

Strategic Preferences and Realignments. In terms of partnerships, the surveys show that China, Russia, and the EU are consolidating their positions, while India and Turkey are losing ground. This does not necessarily contradict external assessments but complicates them. While Indian analysis projects strategic ambition, regional experts downgraded India’s relevance by nearly half from 2023 to 2025 (41.0% to 24.2%). Turkey’s drop (71.8% to 48.5%) similarly challenges Ankara’s aspirations for Turkic leadership via the Organization of Turkic States.

Moreover, the symbolic gap between American strategic rhetoric and its economic unpredictability, as emphasized in BISI’s 2025 report on U.S. tariffs, finds resonance in regional skepticism. While U.S. favorability rose modestly (46.2% to 51.5%), it still lags behind other actors—a result reflecting reputational volatility more than hard economic impact.

Institutional Futures: Functionalism over Formalism. Finally, in the domain of institutional design, internal assessments show a shift from structural ambition to functional pragmatism. Whereas in 2023 a majority of experts called for a new re-

gional organization, by 2025 most favored sector-specific institutionalization. This matches external observations (e.g., Clingendael, IRIS) that highlight the need for flexible, adaptive mechanisms of coordination-rather than formalistic architectures modeled on EU or CIS-style integration.

This regional pragmatism may also explain why many global actors now propose modular, issue-based cooperation formats (e.g., “C5+1” platforms, green energy task forces, transport corridors), which align more closely with the region’s institutional preferences.

Regional Epistemologies: How Central Asian Experts Theorize Their Own Geopolitical Landscape. In contrast to foreign think tanks that often interpret Central Asia through frameworks rooted in great-power rivalry, regional analysts - publishing through platforms such as CABAR.asia, the IWPR, and Uzbekistan’s IAIS - increasingly articulate indigenous epistemologies that foreground asymmetrical dependencies, internal fragilities, and opportunities for recalibration in a volatile global order.

The Ukrainian Crisis and the Geopolitical Reordering of Central Asia. Analyst from Tajikistan writing for CABAR.asia, argues that the erosion of Russia’s geopolitical primacy following the war in Ukraine has generated not emancipation but “geopolitical indeterminacy” - an environment marked by fragmented partnerships and incoherent strategic offers from external actors including China, the EU, the U.S., and Türkiye. He stresses that current multilateral formats such as C5+1 and the China–Central Asia summits remain externally driven and ultimately reproduce asymmetrical dependencies. Azizi calls for internally rooted security architecture, cautioning that diversification without coordination risks entrenching vulnerability under new forms of influence [16].

Radicalization Risks: Foreign Fighters and Repatriation Gaps. A 2025 IWPR article analyzes the threat posed by approximately 300–500 Central Asian fighters still embedded with Hayat Tahrir al-Sham (HTS) in Syria [17]. The report notes that while Kazakhstan’s Zhusan and Uzbekistan’s Mehr repatriation programs represent positive models, most regional states lack systematic approaches to reintegration or deradicalization. Experts stress that absent social reintegration policies, exclusion may revive dormant networks.

Debt-for-Nature Swaps and Fiscal Green Sovereignty. A Kyrgyz expert contributing to CABAR.asia discusses the region’s potential use of debt-for-nature swaps as tools of “fiscal green sovereignty” [18]. While acknowledging structural limitations - including institutional fragility and poor donor coordination - the article argues that such mechanisms could reconcile debt relief with environmental priorities, offering an alternative to extractive growth strategies.

China’s Reform Agenda and Strategic Spillovers. In a policy brief from the IAIS in Uzbekistan, Uzbek expert links the outcomes of the Chinese Communist Party’s Third Plenum to a recalibration in Beijing’s regional engagement. He observes a shift from symbolic mega-projects to economically sustainable initiatives focused on logistics, renewable energy, and agribusiness. However, Bobokhonov also warns that unless Central Asian states cultivate balancing mechanisms - through partnerships with the EU, Gulf states, or India - they risk being structurally absorbed into China’s long-term development blueprint [19].

Conclusion

The comparative analysis of external strategic discourses and internal expert perspectives on Central Asia reveals a region that is simultaneously shaped by and actively shaping its geopolitical environment. International actors increasingly regard Central Asia not merely as a peripheral zone, but as a critical transit corridor, a supplier of strategic resources, and a potential partner in energy and climate transitions. U.S. documents emphasize connectivity, energy independence, and governance reform; European assessments stress critical raw materials and green diplomacy; while China and India project competing development models grounded in infrastructure, institutional engagement, and normative appeal.

Yet the juxtaposition with regional assessments exposes key dissonances. Central Asian experts place greater weight on structural vulnerabilities—particularly water stress, energy insecurity, and economic overdependence—than on external geopolitical rivalry. Moreover, their preferences suggest a move away from comprehensive institutional designs toward sector-specific, functional cooperation. Survey results indicate growing confidence in regional agency, yet this confidence remains constrained by uneven capacity, fragmented institutionalization, and asymmetric partnerships.

Importantly, the regional epistemologies emerging from platforms such as CABAR.asia and IAIS highlight a distinct intellectual trajectory—one that problematizes dependency, advocates recalibration, and situates Central Asia as a space of both contestation and innovation. These voices underline that the region's future cannot be fully understood through external frameworks alone. Rather, it must be analyzed as an evolving actor with its own strategies, constraints, and visions of regional order.

Taken together, this study underscores the importance of integrating external analyses with endogenous perspectives. For policymakers, scholars, and multilateral actors, the message is clear: engaging Central Asia effectively requires not only strategic ambition but contextual sensitivity. A sustainable regional architecture must align with the region's internal priorities, developmental asymmetries, and emerging epistemologies—treating Central Asia not as a passive object of strategy, but as a complex and capable subject of global and regional transformation.

References:

1. Kazakhstan Institute for Strategic Studies under the President of the Republic of Kazakhstan (KazISS). Expert Survey: "Central Asia: Images of the Future". Astana, January 2023.
2. Kazakhstan Institute for Strategic Studies under the President of the Republic of Kazakhstan (KazISS). Expert Survey on Regional Development and Cooperation in Central Asia. Astana, February 2025.
3. Rudenshiold E. The Trans-Caspian Pivot: Infrastructure, Security, and U.S. Regional Priorities. – Washington, DC: Caspian Policy Center, 2025.
4. D'Anieri P., Spencer E. Rebalancing American Strategy in Central Asia: Economic Leverage and Strategic Diplomacy. – Washington, DC: Atlantic Council, 2025.
5. Cornell S. E. The Fragile Frontier: Stability Risks and Strategic Uncertainty in Central Asia. – Washington, DC: Central Asia–Caucasus Institute, 2025.
6. Ansari S. et al. Central Asia's Renewable Energy Frontiers: Gulf–China

- Convergence and European Dilemmas // Stiftung Wissenschaft und Politik (SWP). – Berlin, 2025.
7. Vakulchuk R. Critical Materials and Strategic Dependency: Rethinking EU–Central Asia Cooperation // Friedrich-Ebert-Stiftung (FES). – Berlin, 2025.
 8. Sukhankin S. The Caspian Energy Corridor: France's Role and Strategic Challenges // Institut français des relations internationales (IFRI). – Paris, 2025.
 9. Cohen A. et al. Nuclear Energy and Strategic Autonomy in Central Asia // Institut de relations internationales et stratégiques (IRIS). – Paris, 2025.
 10. Drost D. et al. Rethinking European Presence in Central Asia: Norms, Interests, and Institutional Gaps // Clingendael Institute. – The Hague, 2025.
 11. Hackett J. (Ed.). The Military Balance 2025. – London: International Institute for Strategic Studies, 2025.
 12. Gruzer M. Tariff Geopolitics and Central Asia's Balancing Dilemmas // Bloomsbury Intelligence and Security Institute Policy Paper. – April 2025.
 13. Lombardoizzi L. China's Energy Footprint in Uzbekistan: Gas, Green, and Governance // SOAS China Institute Working Paper. – May 2025.
 14. Wu X. et al. Peripheral Security Management and Regional Integration // Shanghai Institutes for International Studies (SIIS). – January 2025.
 15. Sajjanhar A. India and Central Asia: Normative Engagement in a Competitive Landscape // Ananta Centre. – February 2025.
 16. Azizi R. The Geopolitics of the Ukraine Crisis and Its Impact on Central Asia: A View from Tajikistan // CABAR.asia. – 14 May 2025. – URL: <https://cabar.asia/ru/geopolitika-ukrainskogo-krizisa-i-vliyanie-na-tsentralnuyu-aziyu-vzglyad-iz-tadzhikistana>
 17. Institute for War and Peace Reporting. Could Central Asian Insurgents in Syria Present a New Regional Threat? // IWPR. – 2 May 2025. – URL: <https://iwpr.net/global-voices/could-central-asian-insurgents-syria-present-new-regional-threat>
 18. CABAR.asia. Will Debt-for-Nature Swaps Become a Driver of Green Development in Central Asia? // CABAR.asia. – 28 April 2025. – URL: <https://cabar.asia/ru/stanut-li-obmeny-dolga-na-prirodu-drajverom-zelenogo-razvitiya-tsentralnoj-azii>
 19. Bobokhonov A. The Significance of the Third Plenary Session of the Chinese Communist Party for the Countries of Central Asia // Institute for Advanced International Studies. – 25 June 2025. – URL: <https://iais.uz/ru/outputnew/znachenie-tretego-plenuma-kommunisticheskoy-partii-kitaya-dlya-stranstvennoy-azii>

Материал поступил в редакцию 01.10.2025

Утвержден к публикации 18.12.2025