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Central Asia Amid The Russia–Ukraine War: Geopolitical Realignments, Economic Resilience, And Strategies For Regional Cooperation

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Abstract: This study examines how the Russia–Ukraine war has reshaped the diplomatic choices, economic vulnerabilities and connectivity strategies of Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan. Building on the original comparative assessment, it integrates structural realism, hedging theory and economic resilience with evidence from the World Bank, IMF and EBRD. The analysis distinguishes immediate transmission channels—trade, sanctions compliance, inflation, finance and migrant remittances—from longer-term opportunities in transport diversification and regional institution-building. It argues that the five states do not constitute a uniform geopolitical bloc: their security affiliations, resource endowments and migration dependencies create distinct risk profiles. Nevertheless, enhanced regional coordination can improve bargaining power and reduce exposure to external shocks. The study proposes practical policy measures and three conditional scenarios rather than a deterministic forecast.
Keywords: Central Asia; Russia–Ukraine war; geopolitical hedging; economic resilience; sanctions compliance; migration; Middle Corridor; regional cooperation; sovereignty.

Introduction

The full-scale Russian invasion of Ukraine in February 2022 marked a turning point in Eurasian political economy. Its consequences reach beyond the immediate belligerents: sanctions, disruptions to payment channels, commodity-price movements and altered transport geography have forced neighbouring and connected economies to reconsider established relationships. For Central Asia, the challenge is especially complex because Russia remains a major partner in employment, energy, commerce, education and security, while China, the European Union, Türkiye and other partners offer increasingly consequential alternatives.

This article considers five sovereign Central Asian states—Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan. Their geographic proximity should not obscure differences in external dependence. Kazakhstan shares an extensive border with Russia and participates in the Eurasian Economic Union (EAEU) and Collective Security Treaty Organization (CSTO); Kyrgyzstan participates in both organisations; Tajikistan is a CSTO member and highly exposed to migration-related income; Turkmenistan pursues a formally permanent-neutrality policy; and Uzbekistan retains a relatively flexible institutional position outside the EAEU and CSTO.

The research question is how the conflict has affected national policy autonomy and whether intensified regional cooperation can convert some adverse shocks into sustainable opportunities. The central argument is that diversification can strengthen autonomy only when accompanied by institutional capacity, transparent regulation, infrastructure reliability and effective coordination. Greater traffic through an alternative corridor, for example, does not automatically imply economic sovereignty if its financing, border procedures or maritime capacity remain vulnerable.

The article updates and substantially restructures an earlier Russian-language study by the same author. It retains that study's comparative country approach, attention to sanctions and

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transport, and emphasis on regional consultations, while refining broad claims, distinguishing observation from interpretation and incorporating recent multilateral assessments [1–5].

Literature Review and Conceptual Framework

Structural realism emphasises that states pursue security and autonomy in an international environment without a single overarching authority. For smaller and middle-sized states located between major powers, this can entail flexible partnerships rather than exclusive alignment. Waltz's account of systemic constraints offers one foundation for understanding why Central Asian governments seek to avoid entanglement in the war while protecting essential economic links [6].

Yet a purely security-centred explanation is insufficient. The concept of hedging helps explain simultaneous engagement with competing external actors. Rather than choosing one strategic camp, governments can diversify diplomatic contacts, financial partners and supply chains. Such choices should not be confused with strict neutrality: a state may adopt a particular position on territorial integrity while continuing commercial engagement with multiple parties. Hedging is also costly, because legal requirements and geopolitical expectations may conflict.

Economic resilience adds a third dimension: the ability to absorb shocks, adapt to changed conditions and sustain development. The IMF identifies uncertainty, financial tightening and geopolitical tensions as important threats to the Caucasus and Central Asia, even when aggregate growth remains robust [2]. The EBRD likewise highlights commodity volatility, remittance reliance and dependence on neighbouring markets [3]. These findings qualify simplistic narratives that the war has been either wholly damaging or wholly beneficial for the region.

Transport scholarship contributes an important corrective. The World Bank's Middle Corridor analysis stresses that connectivity gains require operational coordination, digitalisation and investments in railways, ports and multimodal terminals [1]. Its scenario of tripling flows and halving journey times by 2030 is conditional on implementation, not a guaranteed forecast. Thus, infrastructure announcements and functioning corridor capacity should be treated as distinct analytical categories.

This article combines the three lenses into a framework of exposure, response and institutional outcome. Exposure includes trade concentration, dependence on foreign employment and critical infrastructure. Responses include diplomatic balancing, market diversification and compliance. Outcomes are evaluated through policy autonomy, stability, resilience and opportunities for coordinated development.

Research Design and Methodology

The study uses a qualitative comparative design supported by documentary analysis. Its primary material is the author's original Russian-language article, which surveys the war's impact on five states, regional consultative institutions and proposed Eurasian transport routes. The revised analysis cross-references those themes with publicly available reports of the World Bank, IMF and EBRD published between 2023 and 2026 [1–5].

The comparison is structured around five dimensions: (1) formal security and economic affiliations; (2) external trade and payment exposure; (3) migrant labour and remittance vulnerability; (4) transport and energy diversification; and (5) regional diplomacy. The objective is analytical synthesis rather than causal estimation. No new interviews, household surveys or proprietary statistical datasets were collected.

Scenario analysis is used to assess policy sensitivity to alternative conflict trajectories. The scenarios are conditional thought experiments rather than probability-weighted predictions. Quantitative figures are reproduced only when their institutional source and geographic coverage are clear. The IMF's Caucasus and Central Asia aggregate and the EBRD's Central

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Asia grouping, which sometimes includes Mongolia, are not treated as interchangeable with the five-state region.

Limitations include rapidly changing sanctions regimes, heterogeneous national statistical practices, and the difficulty of separating war-related effects from domestic reforms, energy prices and other global conflicts. Findings therefore identify plausible channels and policy implications without claiming that every observed economic change was caused by the Russia–Ukraine war.

Differentiated National Responses

Kazakhstan illustrates the tension between integration and autonomy. Its EAEU and CSTO memberships, shared border with Russia and oil-export logistics generate substantial exposure. At the same time, Astana has publicly emphasised sovereignty, territorial integrity and the importance of international law. Diversification across the Caspian Sea, investment in customs administration and careful attention to sanctions-related trade controls are means of managing rather than eliminating structural interdependence.

Kazakhstan's energy and transport options demonstrate why diversification is gradual. The Caspian Pipeline Consortium remains important to oil exports, while alternatives through the Caspian Sea and South Caucasus require infrastructure capacity, commercial agreements and dependable transshipment. It would therefore be inaccurate to describe new routes as complete substitutes for existing networks. The relevant measure is reduced concentration risk over time.

Kyrgyzstan combines EAEU integration with strong reliance on labour migration, trade and cross-border financial services. Shifts in Russian demand and currency conditions can influence household purchasing power, while sanctions-related scrutiny creates additional compliance burdens for banks and traders. Diversification of employment opportunities and financial channels is therefore a social-policy priority as much as a foreign-policy objective.

Tajikistan's security links with Russia and its dependence on migrant earnings constrain rapid reorientation. Vulnerability arises when external employment rules, wages or remittance costs change. Policies that build domestic employment, portable skills and safe legal migration pathways can help reduce exposure. A key distinction is between short-term remittance fluctuations and long-term structural dependence; the latter requires sustained investment in productive capacity.

Turkmenistan follows a distinctive neutrality doctrine and retains significant energy-export interests. Discussions of westward gas connectivity indicate the appeal of additional markets, but pipelines, transit permissions, finance and demand contracts remain formidable conditions. Its policy should therefore be assessed through practical energy options and institutional constraints, not only through the formal language of neutrality.

Uzbekistan is institutionally outside the EAEU and CSTO and has pursued a diversified diplomatic and investment agenda. Its position creates room to develop ties with Russia, China, the EU, Türkiye and South Asian partners while advocating peaceful settlement of disputes. Nonetheless, migrant income, trade and supply-chain dependence mean that formal non-membership does not confer immunity from shocks. Uzbekistan's regional diplomacy and infrastructure initiatives are important, but their effects depend on cooperation with neighbours.

Economic Transmission Channels

Trade shocks have been uneven. Disruption of traditional logistics and shifts in commercial flows have produced costs for some businesses and opportunities for others. Re-export and transit activity may temporarily raise turnover, yet they also heighten scrutiny of product classification, end-use verification and counterparties. Sustainable growth requires genuine value addition rather than reliance on arbitrage generated by sanctions differences.

Financial connectivity is another transmission channel. Restrictions affecting Russian banks and international settlement networks increased the complexity of some cross-border

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payments. The magnitude of the effect differs by country, bank and transaction. Policymakers must balance continued lawful trade against the reputational and legal costs of inadequate sanctions screening. Compliance capacity is not merely a defensive burden; it can help preserve access to international finance.

Inflation and exchange-rate movements affect import-dependent households, but these effects should not be attributed exclusively to the war. Domestic monetary policy, food harvests, energy prices and global demand also matter. The IMF's October 2025 assessment describes continued resilience alongside risks from uncertainty, weaker demand and tighter financial conditions [2]. This supports an interpretation of simultaneous vulnerability and adaptation rather than generalised regional collapse.

Labour migration is central to social resilience in Kyrgyzstan, Tajikistan and Uzbekistan. Remittances finance consumption and help households manage risk, but they expose domestic welfare to employment and currency conditions abroad. Policies should support lower-cost legal transfers, financial inclusion, reintegration services and skills recognition across destinations. A fall in the ruble's dollar value does not by itself establish a uniform percentage loss in all migrants' real incomes.

Aggregate growth also requires careful interpretation. EBRD projections published in 2025 anticipated continued strong growth in a Central Asia grouping that includes Mongolia, while noting commodity volatility and remittance dependence [3]. Strong aggregate output may coexist with uneven household welfare, regional disparities and exposure to future disruptions. The policy challenge is to translate temporary external inflows into productivity, diversification and durable employment.

Connectivity, Energy and Geoeconomic Reconfiguration

The Trans-Caspian International Transport Route, commonly known as the Middle Corridor, links Central Asia with the South Caucasus and European markets through multimodal infrastructure. Its attraction increased as businesses reassessed northern transit routes. The World Bank's 2023 assessment found that investments and efficiency improvements could triple trade flows and halve travel times by 2030 [1]. These results describe a conditional potential, not the current operating performance of every segment.

Persistent bottlenecks include limited Caspian shipping capacity, port handling constraints, rail coordination, inconsistent documentation and border delays. A competitive corridor must provide predictable end-to-end service rather than merely a map of connected lines. Digital transit records, harmonised tariffs, integrated scheduling and transparent performance indicators can be as important as physical construction.

The China–Kyrgyzstan–Uzbekistan railway is strategically relevant because it could diversify east–west connections and create logistics and industrial opportunities in participating states. However, construction costs, mountainous terrain, financing and interoperability require sustained attention. The project should be evaluated through economic viability, environmental and social safeguards and the distribution of benefits among countries.

Uzbekistan has also promoted southern connectivity through Afghanistan toward Pakistan. The proposed Trans-Afghan railway could improve access to seaports and expand links with South Asian markets. Yet political uncertainty, security, funding and operational risks make completion and utilisation uncertain. The corridor should be treated as a strategic option rather than an assured near-term alternative.

Energy diversification follows similar logic. Kazakhstan seeks resilient oil-export options; Turkmenistan considers potential additional gas markets; Uzbekistan and neighbouring countries face intertwined issues of electricity supply, seasonal demand and regional grid reliability. Regional energy integration, investment in transmission and water–energy coordination may yield broader benefits than bilateral route substitution alone.

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Connectivity also changes the political economy of the region. Transit countries gain leverage when they can offer reliable services, but debt exposure, unequal infrastructure benefits and environmental impacts may create new dependencies. A sound corridor strategy should therefore include competitive procurement, transparent financing, regional dispute-resolution mechanisms and measurable local economic spillovers.

Regional Diplomacy and Institutional Cooperation

The Consultative Meetings of Central Asian Heads of State offer a forum for building common positions on practical regional challenges without requiring identical foreign policies. Such dialogue can address trade facilitation, transport, border administration, water and energy cooperation, disaster response and investment coordination. Its value lies in repeated negotiation and implementation rather than in symbolic declarations alone.

Central Asian engagement with China, the EU, the United States, Türkiye, Japan, India and Gulf partners reflects growing diplomatic pluralism. C5+1-type arrangements can widen financing and technology options, but the five states retain distinct preferences. External partners may prioritise different sectors and standards; regional actors need sufficient analytical and negotiating capacity to compare offers and protect public interests.

Uzbekistan has contributed actively to regional dialogue, including support for consultative diplomacy and cross-border infrastructure. Nevertheless, the region's progress should be understood as the result of cooperation among all five sovereign states. Kazakhstan's transit infrastructure, Kyrgyzstan's and Tajikistan's hydropower potential, Turkmenistan's energy resources and Uzbekistan's population and market links provide complementary assets.

An effective institutional agenda would combine shared customs data standards, corridor service benchmarks, migrant protection arrangements, investment-screening capacity and joint approaches to environmental resilience. Such cooperation is consistent with differentiated national alignments: states can coordinate functional public goods without surrendering the right to pursue independent foreign policies.

Scenario Analysis

Scenario A: protracted conflict and partial economic adaptation. Under continued hostilities and broadly persistent restrictions, Central Asian states would face enduring compliance costs and uncertainty, but some alternative transport and investment patterns could mature. The policy priority would be risk diversification and resilience rather than opportunistic dependence on temporary trade diversion.

Scenario B: intensified confrontation and stricter enforcement. Wider restrictions, more extensive secondary-sanctions exposure or disruptions to financial and transport networks could reduce access to payment services and raise costs for businesses. Governments would need stronger customs transparency, bank-level due diligence, social protection and contingency planning for migrant employment shocks.

Scenario C: negotiated de-escalation and partial normalisation. A credible settlement and any subsequent adjustment of restrictions might lower certain risk premiums and restore some commercial routes. Yet the extent and timing of sanctions changes cannot be assumed. New corridors would remain valuable because route redundancy, competition and regional trade generate benefits independent of the war.

Across all scenarios, policy robustness matters more than forecasting precision. Measures that improve border efficiency, fiscal buffers, education, energy reliability and legal trade compliance retain value under both escalation and de-escalation. By contrast, projects whose economic case depends solely on a particular sanctions configuration carry substantial strategic risk.

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Policy Recommendations and Discussion

First, establish national and regional mechanisms for systematic external-risk assessment. Governments should track exposure to trade partners, remittance sources, commodity markets and critical transport chokepoints. Stress tests can identify which sectors are most vulnerable to payment interruptions or sudden changes in labour demand.

Second, strengthen compliance institutions without obstructing legitimate economic activity. Training for customs officials and banks, transparent product classification, beneficial-ownership checks and consistent guidance to firms can reduce inadvertent violations. Regional exchange of technical practices may improve effectiveness while respecting each state's legal obligations.

Third, prioritise corridor performance rather than announcements alone. Governments and operators should publish comparable indicators for transit times, border delays, capacity utilisation and freight costs. The World Bank's analysis suggests that coordinated operational reforms are essential to unlock infrastructure potential [1, 4].

Fourth, convert remittance dependence into human-capital development. Skills programmes, financial literacy, support for returning migrants and labour-market diversification can cushion household shocks. Bilateral arrangements protecting migrants' rights should be paired with efforts to expand quality domestic employment.

Fifth, deepen functional regionalism through transparent project selection, joint financing where appropriate and regular technical coordination. The region should avoid treating every external investment proposal as inherently beneficial: fiscal risk, local employment, environmental impact and technological transfer deserve systematic evaluation.

Finally, preserve diplomatic flexibility within a principled commitment to international law and peaceful dispute resolution. Economic pragmatism need not entail indifference to sovereignty. Credible, predictable foreign policy is itself an economic asset because it helps sustain investment and diverse international partnerships.

Conclusion

The Russia–Ukraine war has exposed Central Asia's interconnected vulnerabilities while accelerating efforts to diversify diplomacy, logistics and economic partnerships. Its consequences differ substantially across Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan, reflecting variation in institutional commitments, migration exposure, resources and geography.

The analysis finds that the most durable opportunity is not the temporary rerouting of trade but the strengthening of regional capacities: efficient transport systems, reliable finance, diversified labour markets, stronger governance and coordinated diplomacy. External competition can expand choices, yet it can also produce new forms of dependence if infrastructure and investment decisions are poorly governed.

Central Asian regionalism is therefore best understood as a practical strategy for resilience and autonomy, not as the emergence of a unified geopolitical bloc. Future research should test these propositions with harmonised country-level time series, firm surveys and corridor performance data, separating conflict-related effects from domestic reforms and wider global shocks.

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