TSU CENTER FOR EURASIAN STUDIES

Analytical report № 2

Viribus unitis

December 30, 2023

Russia – Central Asia: Trends and Prospects of Interaction, 2022-2024

This study was supported by the Tomsk State University Development Programme (Priority-2030)

INTRODUCTION

The report offered to the attention of the expert community and interested readers is an attempt at overviewing and analyzing the relations between Russia and Central Asian countries (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan) in 2022-2023, the two years marked with the fundamental and accelerating transformation of the world order born in the late 1980s – early 1990s. The significance of Central Asia for Russian foreign policy can hardly be overestimated, as Rusia is linked with the region through the world-longest land border, hundreds of years of shared history, a dense network of political, military, economic, and humanitarian interactions. Russia's Foreign Policy Concept adopted in March 2023 underlines that ensuring "sustainable long-term good-neighborly relations" and combining "the strengths in various fields with the CIS member states" (among which more than half of actual participants are Central Asian states) are "the most important for the security, stability, territorial integrity and social and economic development of Russia, strengthening its position as one of the influential sovereign centers of world development and civilization"[1].

Although there is no shortage of academic, analytic and journalistic publications casting light on different aspects of relations between Russia and Central Asan countries there is a need to draw a comprehensive and up-to-date picture of interactions between Russia and the Central Asian states. Major areas, achievements and contradictions of these interactions in 2022 and 2023 and its prospects in 2024 are the subject of our research. The authors analyze changes in international and regional contexts of Russian policies in Central Asia; bilateral and multilateral security interactions; spheres and trends of economic cooperation development; the complex of humanitarian interrelationships; cross-border and interregional interactions between the regions of the Siberian Federal District and the Central Asian countries. In the concluding chapter the attempt is made to look into the future and to draw scenarios of Russian policy evolution in the region in 2024.

We hope that our report will be of particular interest in the retrospective as the first of the series of annual reports of Tomsk State University Center for Eurasian Studies analyzing the relations between Russia and Central Asian countries in the historical dynamics. The authors would be very grateful for remarks, comments, feedback and recommendations that could help them in preparing the subsequent reports.

[1] Foreign Policy Concept of the Russian Federation. URL: https://www.mid.ru/ru/detail-material-page/1860586/

1. RUSSIA AND CENTRAL ASIA IN THE CHANGING WORLD ORDER

1.1. Global Level

At the end of 2021 the post-Cold war order passed from the state of a prolonged crisis to a stage of radical transformation. The breaking points were the handing of Russia's demands to the US and NATO countries aimed at signing legally binding documents with guarantees of fundamental Russian security interests, the rejection of Russian suggestions by Washington and Brussels and the beginning of the Special Military Operation (SMO) in Ukraine. The Russian demands to the US and NATO countries were supported by China during the Russian President's visit to the PRC in February 2022. After Ukraine had been pressed by the US and the UK into rejecting a compromise peace agreement with Russia in late March 2022 it became clear that the reanimation of the previously existing world order was impossible and the confrontation between Russia and the US and its allies would be prolonged and likely to escalate.

Among the major factors and trends of the transformation of the international system's global level which to a varying degree make impacts on all its regional subsystems are the following:

- implementation by the US, the EU and the UK of the course of actions aimed at the escalation of the confrontation with Russia, at defeating it militarily, exhausting it economically and destabilizing it politically and socially. An important element of this course is increasing pressure on Russia's allies and its external political and economic partners;
- exacerbation of US – China contradictions resulting in the bilateral relations balancing on the brink of conformation;
- further rapprochement between Russia and China which has rendered Moscow political and economic support under the heavy circumstances of Rusia's confrontation with the West. The relations of "comprehensive partnership and strategic interaction", whose deepening was confirmed during the state visit of the PRC President to Russia in March 2023, began to move closer to a political alliance and became one of the key problems on the US - China agenda, accelerating the transformation of the relation between Washington and Beijing into conflictual;
- growing tensions in China-India relations stimulated by the active development of US - Indian and Japanese – Indian cooperation and the deepening of the alliance among the US, Japan, Australia and India;
- strengthening of US positions in the European subsystem of international relations and consolidation of European allies, including formally neutral countries, around the US, consolidation of US alliances with Japan, the Republic of Korea and Australia. At the same time, the tendency to the weakening of US positions in the Middle East has become more entrenched;
- degradation of liberal regimes of international trade and the movement of capital as well of the international humanitarian cooperation;

- declining authority of international institutions, erosion of trust in legal instruments of resolving international contradictions and in diplomacy as the main instrument of conducting international relations, growing frequency and scale of resorting to military power to reach foreign policy goals.

These tendencies are projected to regional subsystems of international relations at different speeds and are differently refracted through regional milieus. On the whole, growing "gaps" in the tissue of the world order contribute to the expansion of the space for foreign policy maneuvering of middle powers and, to some extent, of small states. At the same time, the risks of foreign policy actions and inaction increase for them substantially.

The Central Asian subsystem faces the beginning of the current phase of the world order's transformation in the structurally "half-baked" state. Kazakhstan and Uzbekistan, the regional countries with the largest territories, populations and GDPs, have not accumulated the volumes of foreign policy resources adequate to allow for their full-fledged functioning as poles of the regional subsystem. The development of the Consultative meetings of the heads of state of Central Asia framework has not compensated for the underdevelopment of the intra-regional institutions of interstate interactions. The social construction of the regional subsystem has been generally evolving towards the prevalence of the relations of amity, but a conflictual zone on the Kyrgyz-Tajik border has emerged. Kazakhstan, Kyrgyzstan and Tajikistan remain Russia's allies bilaterally and within the framework of the Collective Security Treaty Organization (CSTO) whereas Uzbekistan's alliance with Russia relies only on the bilateral treaty. The economic union with Russia, the Eurasian Economic Union (EAEU), includes only Kazakhstan and Kyrgyzstan, though the CIS free trade area encompasses Tajikistan and Uzbekistan as well. As of early 2022, China, Russia, India, Pakistan and all the regional countries except Turkmenistan were members of the Shanghai Cooperation Organization (SCO), an overarching institution of multilateral political, economic and humanitarian interactions.

Geographically, Central Asia found itself at a distance from the faultiness of the world order and the zones of military confrontation. However, this distance is not tantamount to a political distance. For Russia, the significance of the region as a reliable hinterland, a supply base and a market has increased. Of greater importance has become the pursuit by Central Asian countries of predictable foreign policy loyal to the Russian interests. A similar trend is characteristic for Beijing's Central Asian policy. The elements of Russian - Chinese competition for the influence in the region have not disappeared, but the prevalence of common interests has become more salient. In February 2022 Moscow and Beijing stated that they "stand against attempts by external forces to undermine security and stability in their common adjacent regions"[2], in March 2023 Russia and China confirmed that "they intend to strengthen their mutual coordination to support Central Asian countries in

---

[2] Joint Statement of the Russian Federation and the People's Republic of China, February 4, 2022. URL: http://www.kremlin.ru/supplement/5770

providing for their sovereignty and national development, do not accept attempts to import "color revolutions" and external interference in the regional affairs"[3].

At the same time the significance of Central Asia has increased for US foreign policy as well. The main goal of the current US policy in the region is the weakening of Russian positions in Central Asia, the undermining of Russia's integration projects in the region and of the bilateral relations between Russia and the Central Asian countries using both "sticks" (threats of sanctions for cooperation with Russia) and "carrots" (provision of preferences aimed at demonstrating the profits coming from the reorientation to cooperation with the US and its allies). China's growing activism in Central Asia does not remain unnoticed in Washington either. In the mid-term, the containment of China in the region is no less important than the weakening of Russian influence.

Evidently, in Central Asia the US does not have sufficient resources to implement the policy of "dual containment" of both Russia and China. In Central Asia, Washington cannot adequately rely on its allies: neither the EU nor Japan have solid positions in the region. The growing divergence of US and Turkish interests does not allow the US diplomacy to count on Ankara. Accordingly, Washington ascribes the role of the major conduit of US policy in Central Asia to the elites of the Central Asian countries while the main policy objectives advancing US geostrategic goals are as follows:

- stimulating regional countries to "integration" which should be the integration "within" Central Asia, without the involvement of Russia and China. In fact, the "integration" implies the building of the coalition of regional countries, in particular of the alliance of Astana and Tashkent, that would contain the Russian and Chinese influence;
- consolidating the positions of pro-American interest groups in the political, business, academic, educational and cultural elites of the regional countries, in particular of Kazakhstan and Uzbekistan.

US Central Asian policy is focused on Kazakhstan and Uzbekistan. As a country bordering on Russia and China, Kazakhstan is of key significance for implementing the strategy of limiting the influence of Russia and China in the region. It is only in Kazakhstan that the US has a powerful lever of impact on the country's leadership through sizeable investments and considerable presence of American companies in the economy. However, Kazakhstan is densely connected both with Russia (which, as the events of January 2022 showed, is ready to resolutely defend its interests in the country) and with China. Accordingly, the US is compelled to act in Kazakhstan cautiously and step by step, taking into consideration the risks that excessively active interference with Astana's foreign and internal policies could entail.

Dealing with Kazakhstan, US diplomacy employs a traditional "stick-and-carrot" approach. On the one hand, a not unsuccessful pressure is exerted on Astana aimed at barring Russian enterprises

[3] Joint Statement of the Russian Federation and the People's Republic of China, March 21, 2023. URL: http://www.kremlin.ru/supplement/5920

from the new round of Kazakhstani state assets privatization. The threats of “secondary sanctions” have some effect in compelling Kazakhstan to limit the re-exports of sanctioned goods to Russia. Unofficially, Washington and London hint at the possibility of freezing Kazakhstani assets and the property of Kazakh businessmen in the West. On the other hand, the US vocally expresses its support of President Tokayev’s political and economic reforms. The US highly estimates Kazakhstan’s active position within the Consultative meetings of the heads of state of Central Asia framework. Underlining Astana’s “leadership” in the region. Washington promises to create favorable conditions for exports of a number of goods from Kazakhstan to the US, mostly of products of metal, chemical and food industries. In March 2023 the US and Kazakhstan signed an intergovernmental memorandum of understanding on cooperation in geology. Bilateral cooperation in the area of higher education has advanced significantly.

Uzbekistan’s crucial importance for US Central Asian policy is determined by the country’s demographic and economic potential as well as by the fact that Uzbekistan has the most advanced military in the region. Uzbekistan was the main military and political partner of the US in Central Asia from 2001 to 2005. The bilateral declaration on the strategic partnership and cooperation framework signed in 2002 stating that the US “would regard with grave concern any external threat to the security and territorial integrity” of Uzbekistan remains the basis of US - Uzbek relations[4]. Uzbekistan is regarded by the American political and academic communities as a core of the potential coalition of Central Asian states that could contain Russia. It is noteworthy that in late April 2022 the conservative Heritage Foundation published the analysis of US -Uzbek relations where Uzbekistan was referred to as a potential “ally against Russia”.

In 2022 – 2023 the US made considerable efforts aimed at expanding American influence on the political, business and cultural elites of Uzbekistan. The US - Uzbek relations intensified in all the major areas, such as political dialogue, military-technical cooperation, economic contacts, the activities of US Agency for International Development and educational cooperation.

The bilateral relations between the US and the countries of the region are complemented by the multilateral “C5+1” framework. In September 2023 the first meeting of this framework at the level of the heads of state was held in New York underscoring the increased importance of Central Asia for American foreign policy. The main outcomes of the summit were an announcement on launching the “US - Central Asia Critical Minerals Dialogue” and President Biden’s promise to pay the first-ever visit of US President to Central Asia in 2024 to take part in the next “C5+1” meeting. Apparently, Kazakhstan’s decision to increase uranium production significantly since 2025 announced in late September was also a result of the New York summit (experts link it with the weakening of American and French positions in West Africa).

---

[4] Declaration on the Strategic Partnership and Cooperation Framework between the United States of America and the Republic of Uzbekistan, March 12, 2002. URL: https://2001-2009.state.gov/p/eur/rls/or/2002/11711.htm

In 2022-2023 EU's activism in Central Asia increased substantially, stimulated by the EU leadership's policies aimed at strengthening the miliary-political dimension of EU's activities, consolidating the "EU -USA" and the "EU – NATO" links and searching for the alternatives to Russian sources of energy imports. A combination of a "soft" image maintained for the media and public opinion with the hard behind-the scenes pressure on the countries of the regions aimed at tying them to the network of anti-Russian sanctions became a distinctive trait of EU's Central Asian policy. EU's activism has mostly become manifest in growing numbers and frequency of multilateral and bilateral meetings. In October 2022 and in March 2023 Astana and Cholpon-Ata (Kyrgyzstan) hosted the first summits of the heads of Central Asian states and the President of the European Council. In October 2023 the first meeting of the regional countries' foreign ministers with all of their EU counterparts and the EU High Representative for Foreign Affairs and Security Policy took place. In Jume 2023 the German President visited Kazakhstan, in October – November 2023 the French President visited Kazakhstan and Uzbekistan, in November 2023 Italian President visited Uzbekistan. In September 2023 the first summit "Germany – Central Asia" was held in Berlin.

The results of the flurry of meetings are not impressive. The Roadmap on deepening relations between the EU and Central Asia adopted in October 2023 is a set of declarations, with an emphasis on the EU support for "the deepening of the intra-regional political dialogue and cooperation" and development of the Transcaspian Transport Corridor. In July 2022 the EU and Uzbekistan initialed the Enhanced Partnership and Cooperation Agreement, but it remains unsigned, like a similar agreement with Kyrgyzstan initialed as early as in 2019; apparently, the delay is due to the EU's dissatisfaction with the Central Asian partners' reluctance to comply with the anti-Russian sanctions. In February 2023 the EU and Tajikistan launched negotiations on the conclusion of the Enhanced Partnership Agreement. During the French President's visit to Kazakhstan a Declaration of intent on cooperation on strategic minerals was signed, but the key question of a French company's participation in the construction of a nuclear power station in Kazakhstan remained unresolved.

On the whole, both US and European positions in the region remain weak and inadequate to the scope of their strategic goals. Central Asian elites are not inclined to trust Washington and Brussels. The US and the EU are unable to provide the regional countries with substantial security assistance and are not ready to considerable investments in Central Asian economies. American and European experts and diplomats try to convince the Central Asian leaders that any possible outcome of the Ukrainian crisis would be unfavorable for Central Asian states, inducing Russia to increase pressure on its southern neighbors. They try to demonstrate the perils of economic dependence on China. However, neither the US nor the EU are able to offer the Central Asian countries even a modicum of what Russia and China provide.

At the same time the regional countries need to cooperate with the West. Cooperation with the US strengthens their positions in relations with Russian and China as well as in the international system in general, and raises their chances to deter the destructive potential of the US known to be able to destabilize the internal policies of the countries acting against American interests. American and European investments and imports of high-tech equipment from the West are important for Kazakhstan and, to a lesser degree, for Uzbekistan.

Russia perceives US and EU policies in Central Asia as a threat to its national interests. Noteworthy are President Tokayev's statements on anti-Russian sanctions made after the Berlin summit that elicited a wide negative resonance in Russia and contributed to the erosion of trust in Russian - Kazakhstani relations. Among the new threats to Russian interest in the region that became visible in 2022-2023 are the prospects of infiltrating national geology agencies and relevant ministries of Central Asian countries with American and European experts within the framework of "critical minerals dialogues", of US administration's encouragement of American companies to buy rare earths deposits in Central Asia, of increased pressure on Kazakhstan to thwart its cooperation with "Rosatom". On the whole, the activism of Washington and Brussels in Central Asia both increases the external resistance to the Russian policy in the region and induces the growth of the regional milieu's internal resistance to Russian actions and initiatives.

1.2. Neighbors and Partners

In 2022-2023, with the end of the coronavirus pandemic and the reelection of XI Jinping to the highest party and state positions for another five years, China's policy in Central Asia entered a new period of increased activism. In September 2022 the state visits to Kazakhstan and Uzbekistan became the first foreign trips made by the PRC President during the two and a half years of the pandemic. In Astana, Xi Jinping underlined that China "will resolutely support Kazakhstan in defending its independence, sovereignty and territorial integrity"[5]. Similar pledges were given to Uzbekistan. In May 2023 Xian hosted the first "China – Central Asia" summit. The PRC leadership stated its readiness to "speed up the China – Kyrgyzstan – Uzbekistan railroad project".[6] China stated that it would soon resume the construction of the new branch of the Turkmenistan – China gas pipeline, the line D, which some experts regard as a competitor to the Russia - China gas pipeline "Power of Siberia".

In 2022 the trade turnover between China and Central Asian countries increased from 41,9 to 70,2 billion dollars[7]. While in 2021 China's trade with the countries of the region had exceeded Russia's trade with Central Asian partners by 15 %, by the end of 2022 this difference grew to 40 %. China consolidated its position as a leading foreign trade partner for each of the five countries of the region. The tendency to the strengthening of China's economic positions in Central Asia continued

[5] China intends to support Kazakhstan in defending independence and sovereignty. URL: https://tass.ru/mezhdunarodnaya-panorama/15749097

[6] Full text of the "China – Central Asia" summit Xian Declaration, 19.05.2023. URL: http://russian.people.com.cn/n3/2023/0519/c31521-20021203.html

[7] How China bypasses Russia in trade with Central Asia. URL: https://www.rbc.ru/economics/28/05/2023/646e43449a794715028aa655

into 2023. Despite the rapprochement of Russian and Chinese geostrategic interests which undoubtedly prevail over the economic interests at the time of the world order's transformation, the mid-term consequences of Central Asia's accelerating gravitation to the China-centric East Asian regional subsystem can hardly be recognized as beneficial for Russia.

On the contrary, India's policy in Central Asia in 2022-2023 was not marked with activism. The exacerbation of India - China contradictions and the fall in August 2021 of the loyal government in Afghanistan weakened India's positions in Central Asia as New Delhi had to focus on containing Chinese influence in South and South-East Asia. The growing tensions between Pakistan and the Taliban and India's de facto recognition of the Taliban government in November 2023 might create more favorable conditions for the projection of Indian influence into Central Asia.

The Afghan factor, whose major components are the continued failure of the Kabul government to suppress the pockets of resistance, the growing contradictions between the factions of the Taliban and the Taliban's dubious ability to pursue competent internal and external policies, contributed to the retention of the Russian influence in Central Asia. Russia maintained working relationships with the Kabul government and informal contacts with the Front of the National Salvation of Afghanistan. Tensions between Dushanbe and Kabul and the Taliban government's construction of the Qosh Tepa Canal diverting water from the Amu Darya that elicited a coordinated negative response on the part of Tajikistan, Turkmenistan and Uzbekistan make Russia's support, as well as the potential Russia's mediation in relations with the Taliban, all the more important for Central Asian countries. There is no doubt that the low predictability of Afghan developments creates risks for Russia and the regional countries, but it also stimulates the preservation and development of military-political cooperation between Russia and Central Asian countries.

The relations between Russia and Iran reached an unprecedentedly high level in 2022-2023. Iranian efforts aimed at consolidating positions in Central Asia have yielded modest results and do not endanger Russian interests. Both Russia and Iran are not interested in the construction of the Transcaspian pipeline which is legally hindered by Tehran's delayed ratification of the Convention on the Legal Status of the Caspian Sea. For Iran, ensuring Central Asian countries' benign neutrality in case of escalating conflict with the US is more important than the outright projection of its influence into the region. For Central Asian countries the potential benefits of full-scale economic and transit cooperation with Iran are outweighed by the real losses that displaying solidarity with Iran would entail under the conditions of confrontation between Iran and the West that reached new heights in October 2023.

The Ukrainian conflict increased the significance of Turkey as a regional and global player. Ankara tries to reap maximum benefits form the status of a country retaining dense contacts both with Russia and with the Ukrainian authorities and playing one of the major roles in NATO. Although Turkey faces a period of financial and economic turbulence, the country has succeeded in strengthening its positions in Central Asia. Ankara's stance in the region has been reinforced due to the all-out support it gave to Azerbaijan that allowed Baku to score a decisive victory in Karabakh in the fall of 2023 and to the opening of the prospects of Armenia-Azerbaijan settlement which would include the establishment of a direct transport corridor between Azerbaijan and Turkey. The volumes of Turkey – Kazakhstan trade increased significantly. In March 2022 Turkey and Uzbekistan signed a preferential trade agreement. Ankara is the main driver of the development of trilateral cooperation frameworks "Turkey – Azerbaijan – Turkmenistan", "Turkey – Azerbaijan – Uzbekistan" and "Turkey – Azerbaijan – Kazakhstan". The institutional infrastructure of the Organization of Turkic States develops rapidly, with the Turkic Investment Fund established in March 2023. Turkey is active in politically supporting the Transcaspian Transport Corridor and underlines its readiness to transit the Turkmen gas exports to Europe.

Under the conditions of the global turbulence Russia and Turkey prefer to emphasize their common interests, keeping their eyes shut on a number of fundamental contradictions. Meanwhile, Moscow's and Ankara's interests diverge in the Middle East, the Noth Africa, the Balkans, the South Caucasus and in Ukraine. They also diverge in Central Asia where the growing prominence of the Turkish vector in the foreign policies of the regional countries, while not a direct threat to Russia, makes the conditions for the advancement of Russian national interests more complicated. In fact, Turkey is seeking to move from the category of regional powers to that of great powers, an ambition that creates a fertile ground for the exacerbation of Russian – Turkish contradictions.

Regional organizations and multilateral institutions face an uphill battle in trying to adapt to global and regional transformations and often turn out to be their "first victims". The Ukrainian crisis and the escalation of the Armenian – Azerbaijani conflict have sent the CSTO into the "survival mode". The pressure of the anti-Russian sanctions has put the brakes on the EAEU integration and has apparently made a highly unfavorable impact on the prospects of Uzbekistan's entry into the Union. The worsening of India – China relations has undermined the real significance of the SCO. Iran's refusal to ratify the Convection on the Legal Status of the Caspian Sea unless the waters and the shelf are divided between Iran and Turkmenistan and Iran and Azerbaijan complicates the multilateral cooperation in the Caspian which Russia offered to institutionalize as a Caspian Council in December 2023.

At the same time, within the framework of the Commonwealth of Independent States (CIS) which became a more cohesive grouping after the de facto withdrawal of Ukraine and Moldova the agreement on the free trade in services regulating the trade in services and investments regime between the EAEU countries and Uzbekistan and Tajikistan and the treaty on the establishment of the Intentional Organization for the Russian Language were signed in 2023. The potential of the "Russia – Central Asia" framework was highlighted by the first meeting at the presidential level held in October 2022.

Global and regional transformations have induced the countries of the region to intensify the intra-regional interactions. In particular, the cooperation between Kazakhstan and Uzbekistan which includes the elements of foreign policy coordination gained momentum. The agenda of the Consultative meetings of the heads of state expanded significantly. Although the regional milieu has generally become less permeable for Russian influence, Central Asia remains the region of the world with the most favorable conditions for the advancement of Russian political, economic and humanitarian interests.

2. RUSSIA AND CENTRAL ASIA: SECURITY INTERACTION

2.1. Traditional and New Security Challenges in the Region

The exacerbation of the military-political situation in Europe, the South Caucasus and the Middle East in 2021-2023 makes us pay closer attention to Central Asian security. Regretfully, the regional countries do not always succeed in finding adequate responses to security challenges which are primarily internal though have implications for foreign policy. Central Asian security challenges can be roughly divided into traditional and new, with the latter crystallized within the recent decade. These factors are densely intertwined, and their separation somewhat arbitrarily reflects their predominantly political or mostly societal and technological nature. Traditional challenges are primarily political while new challenges are mostly societal and technological.

Among the traditional security challenges of primarily political nature are the following:

1) Political instability and the fragility of political regimes. The civil war in Tajikistan (1992-1997), the series of coups in Kyrgyzstan (2005-2020), the political crisis and violence in Kazakhstan in January 2022 are illustrative of the fragility of regional political systems, of the entrenched intra-elite contradictions, social and economic instability, the continued functioning of strong social groupings capable of defying the state, pervasive corruption at all levels of power and low efficiency of state structures.

2) Religious radicalism and terrorism. Central Asian states are in the period of the renaissance of interest in Islamic culture. Growing numbers of citizens follow Islamic tenets in their daily lives, clothing, food and rites. On the wave of interest in Islam, radicals and Islamic fundamentalists have occupied a significant societal niche, with some of them moving to openly terrorist activities. Despite the serious pressure from the authorities and law enforcement structures, powerful semi-legal radical structures of Islamic fundamentalists continue to permeate Central Asia, with a network of underground religious schools active in all the five countries. Every year the authorities and law enforcers shut down hundreds of such schools, but new ones replace them. Semi-legal radical structures penetrate into all the life spheres, ranging from education to business and state institutions. When the authority of the state weakens, it is the Islamists who often come to the foreground as the sledgehammer capable of shaking the foundations of the political regime.

3) Interethnic contradictions. Another serious challenge that the Central Asian states have confronted since the first days of their independence is the complexity of interethnic relations. Central Asia, where dozens of diverse ethnic groups live since ancient times, has more than once been an arena of violent interethnic conflicts and clashes: in the Ferghana Valley of Uzbekistan in 1989, in the Osh region of Kyrgyzstan in 1990 and 2010. The ethnic factor played a significant role in the recent upsurges of violence in the Gorno-Badakhshan autonomous region of Tajikistan in 2021 and 2022 and in the unrest in Karakalpakstan before the adoption of the new constitution of Uzbekistan in 2022. The problems of equal political representation of different ethnic groups, of their social and economic equality continue to be unresolved in Central Asia, therefore any weakening of the political power results in the redistribution of the spheres of influence among political actors, including the ethnic groups.

4) Border conflicts. On the one hand, the countries of the region have succeeded in resolving border issues with their largest neighbors, Russia and Chian. On the other hand, unresolved border disputes remain within the region, especially among Uzbekistan, Kyrgyzstan and Tajikistan in the Ferghana Valley. Mosaic ethnic structures and high population density, as well as the deficit of land and water resources, make border conflicts particularly acute. At present, the most serious contradictions are between Tajikistan and Kyrgyzstan. In 2021 - 2022 they resulted in the military clashes around the Tajik enclave of Vorukh surrounded by the Kyrgyzstan's territory, with hundreds of casualties on both sides. Although the parties have made steps to resolve the disputes, the ultimate solution of border problems is far ahead.

Among the new security challenges in Central Asia are the following:

1) Demographic changes. Though the average population growth rates are declining, Central Asia remains the only region of the post-Soviet space where the population continues to grow. The prevalence of young people, multi-child families and increased life expectancies combine to produce a stable annual population growth of 1-2 %. Despite wide-scale immigration (8 million people left Central Asia after 1991 and another 5 million spend years beyond the region as labor migrant), since independence the regional population has grown by 60 %, or almost by 30 million. 80 million people live in Central Asia nowadays, with the projected increase to 85 million by 2030. It exerts enormous pressure on education and health care systems, the labor market and the natural environment. The high share of the youth increases the risks of political crises as young people are likely to become a moving force and main participants of social unrest and violent protests.

2) Ecologic challenges and climate change. In Central Asia, the pace of climate changes exceeds the world average, and its transformations become less predictable. This dynamics is largely accounted for by the significant increase in pressure on the natural environment. The regional population has grown sixfold within the last 100 years. Climate changes engender serious consequences, such as frequent droughts, desertification, greater frequency of landslides, mudflows, floods, dust storms and sandstorms. It entails the degradation of agriculture and ecologic migrations, increasing the levels of social, economic and political instability in Central Asia.

3) Infrastructure problems. One of the most serious security challenges for Central Asia is poor infrastructure limiting the possibilities for economic development. In many parts of Central Asia infrastructure collapsed as early as in the 1990s – early 2000s. However, the degradation goes on, with the recent years demonstrating the growing salience of infrastructure crises. The accident at the TPP in Bishkek in2018, the blackout in Kazakhstan, Uzbekistan and Kyrgyzstan in January 2022, heating and power outages in Tashkent in winter 2023 are illustrative of the scope of the problem. Both transport and water infrastructures are unable to meet the development challenges. The transport connectivity within Central Asia countries is severely limited. The region lags behind both in the levels of infrastructure investment and in the efforts to maintain the existing infrastructure. An acute problem for many parts of Central Asia is the combined degradation of different infrastructural subsystems, such as inadequate transportation, destroyed systems of irrigation, lack of centralized water supplies and sewerage, electricity and gas shortages. Regular electricity outages are typical for many regions of Uzbekistan, Tajikistan and Kyrgyzstan while the difficulties of linking to electricity networks are one of the major obstacles to the development of industries.

The comprehensive analysis and prognostication of Central Asian developments requires singling out **the potential zones of conflicts and contradictions that would retain significance within the next 10 to 15 years:**

1) The border conflict between Tajikistan and Kyrgyzstan. Tensions at the border would simmer unless the parties conclude the delimitation and demarcation of the contested territories. On the one hand, Tajikistan and Kyrgyzstan state their readiness to border dispute resolution and conduct negotiations, on the other hand, provocations at the border leading to new escalations cannot be ruled out.
2) Instability in the regions with high proportions of ethnic minorities (the Republic of Karakalpakstan in Uzbekistan, the Gorno-Badakhshan Autonomous Region in Tajikistan, southern regions of Kazakhstan and Kyrgyzstan with significant shares of Uzbeks and other ethnic minorities). Social and economic problems, political inequality, ecologic challenges, resource deficiencies are first and foremost characteristic for the territories with significant ethnic minorities. In this context interethnic tensions are likely to come to the foreground and become a new element of instability in Central Asia.
3) Security problems would be of particular importance for big cities and major industrial centers where both traditional and new security challenges are concentrated. Kazakhstan where Western areas with the centers of oil and gas industries have repeatedly become flashpoints of political instability is particularly vulnerable in this regard. In December 2017 violent protests engulfed the town of Zhanaozen in Mangistau region while in January2022 it was in the Western regions that the unrest had begun that later spread to the whole country. The key events of January 2022 happened in Almaty, the largest city of Kazakhstan, which for several days remained an epicenter of violence and looting.
4) An important area of contradictions is the problem of water resource distribution. Along with the degradation of irrigation infrastructure and continued population growth the problem is exacerbated by the construction of a wide-scale Qosh Tepa Canal in North Afghanistan launched in 2022. The implementation of this project will make Afghanistan a new powerful player in the area of water distribution.

After the fall of the pro-American regime and the Taliban return to power the Afghan factor remains, at least for the near future, a grave external challenge to Central Asia. Its importance consists not so much in the problem of terrorist and Islamist groups endangering the Central Asian countries' security as in the questions of energy and transport infrastructure development and water resource distribution.

2.2. Relations with the CSTO Countries

Russia's security relations with Central Asian countries can be divided into two blocks: the relations with the CSTO countries and the relations with the countries who are not members of this Organization. The first group includes Kazakhstan, Kyrgyzstan and Tajikistan while Uzbekistan and Turkmenistan belong to the second.

Though Russia's relations with Kazakhstan, Kyrgyzstan and Tajikistan develop within the CSTO framework, at present they can be characterized as primarily bilateral within the common security paradigm. This paradigm relies on security guarantees, primarily from Russia, and on the instruments of providing these guarantees (Russian military bases in the CSTO countries, the CSIO Collective Rapid Deployment Forces), the building of joint security systems (such as the joint air-defense system) and the maintenance of common defense and security standards, mainly due to Russian commercial and donated supplies of weapons and military equipment.

Russian security guarantees and instruments of their provision. The largest Russian military contingent beyond its borders is deployed in Central Asia, with the total number of military personnel exceeding 10000. The largest unit is the 201st Russian military base (Dushanbe and Bokhtar, Tajikistan) which is part of the Central Military District and includes the 670th air group and the 303rd helicopter squadron (Ayni, Tajikistan). The total personnel numbers more than 7000. Along with that, the military objects in Central Asia include the 999th air base (Kant, Kyrgyzstan) which is part of the Central Military District's 14th Air Force Army. The base has personnel of more than 500 and deploys planes Su-25 and Su-25SM, Mi-8MTB helicopters and Orlan-10 drones. Besides, in the territories of Kazakhstan, Kyrgyzstan and Tajikistan there are multiple objects of the Russian military: objects of the 929th State Fight Test Center and of the 4th State Central Polygon in West Kazakhstan, the Sary-Shagan testing polygon (Priozersk, Kazakhstan), the Optical-electronic complex "Window" (Nurek, Tajikistan) and the 954th anti-submarine base (Karakol, Kyrgyzstan).

Russian security guarantees and a significant military contingent in the region allows the Central Asian countries to maintain stability in critical moments. The CRDF mostly consisting of Russian servicemen made it possible to rapidly pacify the situation in Kazakhstan in January 2022.

Building joint security systems. By 2023 the long and arduous efforts of the CSTO member states had resulted in the establishment of the joint air defense system (ADS). It is of particular importance for Central Asian countries where the ADS almost ceased to exist after independence. Russia has signed appropriate agreements with each of these countries, and ADS exercises are held regularly. Under these agreements, Russia delivered air defense complexes to Kyrgyzstan and Tajikistan.

The SCO is another important element of the common security system. During more than 20 years of its existence, the Organization has become a multilateral forum with a broad security agenda. Nowadays the SCO, with its huge political, economic and human potential, can be called a guarantor of regional security. Strengthening cooperation within the SCO is one of the priorities for Russia and regional countries.

Maintaining common defense and security standards. In 2022-2023 Russian arms deliveries to the CSTO member states were almost halted because of sanctions and the reorientation of the Russian military industry to providing for the internal needs. It is problematic for the Central Asian countries as they had received around 80 % of military procurements and donations from Russia. Shrinking deliveries are likely to significantly influence the continued exploitation by the regional countries of the Soviet and Russian weapons and military equipment. Nevertheless, in 2022 Kyrgyzstan purchased from Russia 55 armored military vehicles “Tigr” and 50 specially equipped KamAZ trucks, in 2023 Pechora-2 BM mobile anti-aircraft missile systems, trucks, ambulance cars and microvans were purchased. In 2023, Russia delivered to Tajikistan two S-300 missile systems (8 launchers). In late November 2023 Astana announced a decision to purchase 10 Russian fighter jets Su-30SM in 2023 and 2024.

Besides, Russia helps the regional CSTO countries in developing their military production and repairs. Thus, Russian helicopters Mi-8AMT and Mi-171Sh are assembled in Kazakhstan since 2020 at the Aircraft Repair Plant # 405 in Almaty, with the assemblage going on in 2022-2023. In particular, 2 helicopters were assembled in 2023 for Kazakhstan’s Ministry for Emergency Situations. In 2024 another three helicopters Mi-8AMT/ Mi-171Sh are expected to be assembled out of Russian-made components. The production of Kalashnikov assault rifles (AK-12, AK-15) continues at the Tynys plant in Kokshetau. In 2022 the Kyrgyz Defense Ministry’s Central Repairs Base of weapons and military equipment was opened with Russia’s help in the town of Balykchi. It has the up-to-date equipment allowing for the comprehensive technical servicing and the current repairs of weapons and military vehicles.

2.3. Russia’s Relations with Uzbekistan and Turkmenistan

The security relations between Russian and Uzbekistan rely on the bilateral Treaty on the development of military-technical cooperation which was signed on November 29, 2016 and entered into force in April 2017 and on the Strategic Partnership Program in the military sphere for 2021-2025 signed in Bukhara in April 2021 during Defense Minister Shoigu’s visit to Uzbekistan. According to these documents, deliveries of military equipment, servicing and repairs of arms and military vehicles, military-technical assistance, cooperation in research and development were envisaged. In

2021 Russia’s deliveries to Uzbekistan included Su-30SM jets, Mi-35M helicopters, Buk-M2E air defense missiles systems, BTR-80 and BTR-82A armored personnel carriers, Orlan-10E drones, Typhoon-K armored fighting vehicles and small arms, with the total volume of deliveries estimated at more than 2 million dollars. Arms deliveries continued in 2022-2023, though in lesser volumes which cannot be specified because of restrictions on publishing Russian foreign trade statistics. Along with that, Uzbek enterprises assemble military equipment on Russian licenses. In particular, a plant in Samarkand assembles KamAZ-4326 and KamAZ-5350 trucks for Uzbekistan’s military.

Security relations between Russia and Turkmenistan develop on the bilateral basis. The key documents defining Russia- Turkmenistan security relations are the Treaty on strategic partnership which was signed in Ashgabat on October 2, 2017 and entered into force in June 2018 and the Agreement on security cooperation of April 10, 2003, which was ratified and entered into force only in November 2022. Relying on the neutrality principle, Turkmenistan has traditionally showed little interest in security cooperation with Russia. Ashgabat has always refused to join multilateral security platforms such as the CSTO and the SCO and has avoided participation in joint military exercises and maneuvers. However, since 2017, after a new impetus had been given to bilateral cooperation, Russia intensified its efforts aimed at inducing Turkmenistan to develop deeper security partnership. In the 2010s Russian military deliveries to Turkmenistan totaled 400 million dollars and included T-90c tanks, Mi-17-1B helicopters, Smerch multiple rocket launcher system, infantry fighting vehicles, KamAZ trucks and two Molniya missile boats of Project 12418.

The major issue for Russia – Turkmenistan security cooperation is the security of the Turkmen-Afghan border. The two countries are also interested in combating transnational crime, terrorism, extremism, drug trafficking, as well as in guaranteeing information security and blocking the channels of terrorism financing.

3. ECONOMIC COOPERATION: GROWTH AND ITS LIMITS

3.1 Trade

Spurred by the anti-Russian sanctions introduced by the countries of the collective West, in 2022 the Russian business was compelled to turn to the East. Though some Russian physical and legal entities have been facing the sanctions since 2014, the current wave of sanctions is incomparably stronger and broader. The existing US and EU sanctions include restrictions on deliveries to Russia of a wide list of groups of goods and services, including high-tech goods, ban on imports of a number of goods and services from Russia, fiscal and transport restrictions, and freezing of assets. No Central Asian country has introduced sanctions against Russia in response to the SMO. Accordingly, their governments found themselves under pressure of the Western countries, and their companies face the threats of secondary sanctions for cooperating with Russian partners.

Statistical data show the increased imports to Russia of goods from the countries that did not join the sanctions, including from China and most of Central Asian countries. The former leaders in imports of goods to Russia largely lost their positions. In 2022, significant growth of imports of goods to Russia was recorded for Kyrgyzstan (in 2.8 times) and for Uzbekistan (in 1.5 times). Imports from Kazakhstan increased by 23 % while imports from Tajikistan fell by 11 %. Th growth of trade with some Central Asian countries was connected with the expansion of parallel imports which allows the Centra Asian countries both to earn money and to stimulate the development of logistics[8].

Table. Leaders in exports of goods to Russia, 2017 – 2022 [9]

	Country	Volume of imports, USD thousands					
		2017	2018	2019	2020	2021	2022
1	China	48,042,300	52,217,993	54,126,998	54,913,425	72,693,299	76,122,649
2	Germany	24,228,044	25,510,486	25,111,891	23,383,773	27,351,555	15,523,310
3	USA	12,663,805	12,682,131	13,436,080	13,213,422	17,265,391	1,715,080
4	Belarus	11,768,319	12,179,232	12,800,697	12,604,664	15,635,533	…
5	South Korea	6,933,359	7,008,953	8,001,954	7,159,386	12,986,922	6,328,173

[8] Salikhov M. Economic Relations between Central Asia and Russia at the Time of Global Changes. URL: https://ru.valdaiclub.com/a/highlights/ekonomicheskie-svyazi-tsentralnoy-azii-i-rossii/

[9]Data source: List of supplying markets for a product imported by Russian Federation. URL: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c643%7c%7c%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1

6	France	9,633,011	9,561,721	8,567,151	8,083,817	12,211,464	3,242,573
7	Italy	10,108,735	10,590,386	10,906,984	10,207,443	12,044,765	6,646,331
8	Japan	7,761,399	8,819,217	8,960,307	7,111,572	9,127,294	4,639,548
9	Kazakhstan	4,916,678	5,295,922	5,570,993	5,054,817	7,132,347	8,780,725
10	Turkey	3,383,401	4,215,914	4,971,001	5,111,623	6,514,509	9,343,472
32	Uzbekistan	1,026,407	1,063,042	1,177,681	1,221,770	1,705,446	2,599,858
65	Kyrgyzstan	206,052	248,325	316,215	240,152	348,099	963,507
81	Turkmenistan	84,372	155,203	151,475	320,701	140,605	…
87	Tajikistan	25,246	44,308	36,906	42,559	99,101	88,221

Due to the fact that the previously concluded contracts with Russia for deliveries of goods, including the oil contracts, continued to be implemented in 2022, the changes in the geography of Russia's exports to its key partners showed diverging trends: the exports to the Netherlands and the UK fell sharply (in 1.8 and 3.3 times respectively), but the exports of goods to Germany and particularly to Italy increased despite the sanctions. Russian exports of goods to China and Turkey increased substantially. However, the growth of exports to the Central Asian countries was not impressive: the largest increase was recorded in Russian exports to Tajikistan (by 42.3 %) while the volume of exports to Kazakhstan somewhat reduced.

Table. Major destinations of Russian exports in goods, 2017-2022[10]

	Country	**Volume of imports, USD thousands**					
		2017	**2018**	**2019**	**2020**	**2021**	**2022**
1	China	38,922,044	56,040,503	56,791,577	49,146,337	68,679,248	114,148,971
2	Netherlands	35,611,335	43,470,987	44,788,952	24,819,407	42,145,025	23,348,465
3	Germany	25,747,379	34,096,334	28,049,481	18,618,931	29,645,676	30,301,291

[10] Data source: List of importing markets for the product exported by Russian Federation. URL: https://www.trademap.org/Country_SelProductCountry.aspx?nvpm=1%7c643%7c%7c%7c%7cTOTAL%7c%7c%7c2%7c1%7c2%7c2%7c1%7c1%7c2%7c1%7c1%7c1

4	Turkey	18,220,741	21,345,044	21,063,254	15,929,123	26,426,295	58,853,499
5	Belarus	18,424,583	21,819,797	20,544,970	15,979,802	23,130,752	…
6	UK	8,746,712	9,769,710	13,272,051	23,158,449	22,274,620	6,766,920
7	Italy	13,838,765	16,405,936	14,341,995	10,071,381	19,285,527	30,718,451
8	Kazakhstan	12,323,913	12,923,333	14,050,846	14,051,466	18,493,830	17,342,678
9	USA	10,735,054	12,534,204	13,189,312	10,958,295	17,747,414	15,071,129
10	South Korea	12,345,338	17,832,181	16,357,313	12,468,101	16,894,810	14,817,362
19	Uzbekistan	2,625,391	3,320,803	3,908,165	4,659,636	5,203,921	6,053,274
42	Kyrgyzstan	1,388,934	1,635,408	1,550,053	1,456,872	2,156,019	2,270,003
57	Tajikistan	692,305	849,555	953,101	795,511	1,114,247	1,585,687
62	Turkmenistan	343,780	288,831	543,322	649,475	725,003	…

Reports by the relevant Russian ministries prove that the shares of trade partners such as China, India, Kazakhstan and Belarus in Russian foreign trade increased[11]. By some estimates, in 2022, Russia's trade turnover with the Central Asian countries increased by 15 %[12], by other estimates there was a 20 % increase, with the turnover exceeding 41 billion dollars[13].

Traditionally, Russia's trade with the Central Asian countries was dominated by different categories of raw materials (first and foremost, by mineral raw). Industrial goods, agricultural products, chemicals, oil products, pharmaceuticals, metals, machinery, vehicles were also present in the picture[14]. Since 2022, the Russian Federal Customs Service stopped publishing by-country data on

[11] Tectonic shft: how Russian foreign trade changed in 2022. URL: https://www.rbc.ru/economics/05/01/2023/63a449789a79477778972b81?from=copy

[12] Russia's trade turnover with Central Asian countries increased by 15 % in 2022. URL: https://tass.ru/ekonomika/17600953

[13] Investments of Central Asian countries in Russian economy increased fourfold in 2022. URL: https://www.interfax.ru/business/901627

[14] Russia and Central Asia. URL: https://www.mid.ru/ru/foreign_policy/vnesnepoliticeskoe-dos-e/problematika-prostranstva-sng/rossia-i-problemy-central-noj-azii/

the foreign trade structure[15]. Accordingly, estimates of the structure of Russia's trade with the Central Asian countries can be made only on the basis of the published national statistics of the partner countries.

The structure of the imports of goods from Kazakhstan to Russia did not change substantially in 2022-2023. From January to October 2022 it was dominated by metals and their articles (23.9 %), machinery, equipment, vehicles, appliances (22.9 %), chemicals, including plastics and rubber (21,1 %). From January to October 2023 the imports of machinery, equipment, vehicles, and appliances increased to 27.3 %, of chemicals – to 27.1 %, the imports of metals and their articles fell to 18.6 %. From January to October 2023 the imports from Kazakhstan increased by 14 % and reached 8.12 billion dollars[16]. In January – October 2022 the share of Russia in the total volume of Kazakhstani exports was 10 %, in January – October 2023 it increased to 12.6 %[17].

The structure of Russian exports to Kazakhstan in 2022-2023 remained stable as well. From January to October 2022, it was dominated by machinery, equipment, vehicles and appliances (19.4 %), metals and their articles (18.0 %), animal and vegetable products and foodstuff (17,9 %), and chemical products (16.7 %). Mineral raw accounted for 11.8 %, including 7.1 % of fuels. In January – September 2023 metals and their articles rose to the top of Russian exports to Kazakhstan (their share increased to 19.8 %). They were followed by animal and vegetable products and foodstuff (19.5 %), machinery, equipment, vehicles and appliances (18.9 %), chemicals (16.8 %). The share of mineral raw increased modestly (to 12.1%), including 9.1 % of fuels[18]. On the whole, the volume of Russian exports to Kazakhstan decreased by almost 10 % as compared to the relevant period of 2022 and amounted to 13.2 billion dollars. Meanwhile, Russia's share in the total volume of Kazakhstani imports fell significantly, from 36.4 % in January – October 2022 to 26.7 % in the relevant period of 2023[19].

Major categories of Russian imports from Kyrgyzstan in January – October 2023 were copper and articles thereof (67.5 million dollars), dishwashers (57.7 million dollars), cars (43.8 million dollars), footwear (23.2 million dollars), metal cutting machines (22.5 million dollars), turbojet, turboprop and gas engines (19.4 million dollars). As compared to the relevant period of 2022, the value of imports of metal cutting machines (in 1843.7 times), cars (in 3.7 times) and printing equipment (in

---

[15] Exports of Russian goods set the record in 2022. Why the indicators can go down in 2023. URL: https://www.rbc.ru/economics/14/03/2023/640f35739a7947254d6f8154?from=copy

[16] Structure of exports by major product groups with the EAEU countries, January – October 2023. URL: https://stat.gov.kz/ru/industries/economy/foreign-market/spreadsheets/

[17] Major foreign trade indicators of the Republic of Kazakhstan, January – October 2023. URL: https://stat.gov.kz/ru/industries/economy/foreign-market/spreadsheets/

[18] Imports from the EAEU countries by major categories of goods, January – October 2023. URL: https://stat.gov.kz/ru/industries/economy/foreign-market/spreadsheets/

[19] Main foreign trade indicators of the Republic of Kazakhstan, January - October 2023. URL: https://stat.gov.kz/ru/industries/economy/foreign-market/spreadsheets/

170 times) skyrocketed. Previously, engines had never been imported from Kyrgyzstan to Russia[20]. Thus, statistics shows the increased volumes of parallel imports of high added value goofs from Kyrgyzstan to Russia. Meanwhile, the imports to Russia of light industry products traditionally significant for Kyrgyzstan fell sharply. The imports of cotton yarn fell in 38400 times, of knitted fabric with elastane wider than 30 cm. in 2300 times, of sewing thread made of chemical fibers in 507 times, of travel bags by 61.5 %, of dried fruit and nuts by 48 % [21].

Uzbekistan's exports to Russia were growing in 2021-2022, resulting in the increase of Russia's share in the total volume of the country's exports (from 12.5 % to 16 %)[22]. Within the 11 months of 2023, the volumes of Uzbek exports to Russia exceeded the cumulative volume of the previous year, amounting to more than 3 million dollars, or 13.2 % of the total country's exports[23]. Major categories of Uzbek exports to Russia in 2022, as in the previous five years, were cotton (516 million dollars), sewing accessories (448 million dollars), fruit and nuts (361 million dollars)[24].

Russian exports to Uzbekistan have been growing since 2017 and exceeded 6.2 billion dollars in 2022. Russia's share of Uzbekistan's total imports reached 20.25 %[25]. In 2022, as in the previous five years, major categories of Russian exports to Uzbekistan were iron and steel (1.14 billion dollars), timber and articles of timber and charcoal (734 million dollars), mineral fuels (709 million dollars), articles of iron and steel (403 million), nuclear reactors, boilers and other appliances (365 million dollars), animal and vegetable fats and oils (355 million dollars)[26]. Accordingly, the structure of trade between Russia and Uzbekistan did not undergo significant changes in 2022.

Within the first seven months of 2023, the value of trade between Russia and Uzbekistan increased by 14.5 % while its physical volume grew by almost 40 %. The leaders of the growth were Russian exports of mineral products (by 61 %) and chemicals (by 20 %), exports of foodstuff grew modestly (by 5%). Russian imports from Uzbekistan increased as well, in particular the imports of textiles (by

---

[20] Mutual trade in goods between Kyrgyzstan and Eurasian Economic Union member states in January - October 2023. Statistical bulletin. URL: https://www.stat.kg/ru/publications/vzaimnaya-torgovlya-tovarami-kyrgyzskoj-respubliki-s-gosudarstvami-chlenami-evrazijskogo-ekonomicheskogo-soyuza/

[21] Mutual trade in goods between Kyrgyzstan and Eurasian Economic Union member states in January - October 2023. Statistical bulletin. URL: https://www.stat.kg/ru/publications/vzaimnaya-torgovlya-tovarami-kyrgyzskoj-respubliki-s-gosudarstvami-chlenami-evrazijskogo-ekonomicheskogo-soyuza/

[22] The Republic of Uzbekistan's by country exports of goods and services. URL: https://stat.uz/ru/ofitsialnaya-statistika/merchandise-trade

[23] The Republic of Uzbekistan's by country exports of goods and services in 2023. URL: https://stat.uz/ru/ofitsialnaya-statistika/merchandise-trade

[24] Bilateral trade between Russian Federation and Uzbekistan. URL: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c860%7c%7c643%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1

[25] The Republic of Uzbekistan's by country imports of goods and services. URL: https://stat.uz/ru/ofitsialnaya-statistika/merchandise-trade

[26] Bilateral trade between Uzbekistan and Russian Federation. URL: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c860%7c%7c643%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1

more than 25 %) and of machinery and vehicles[27]. The latter are apparently part of parallel imports whose flows began to reach Russia via Uzbekistan in 2023.

In 2014, the volumes of Tajikistan's exports to Russia fell sharply, with the growth resuming in 2021-2022. In 2022, Russia's share of Tajikistan's exports was only 4.1 %, or 88.2 million dollars[28]. In 2022, the main categories of exports from Tajikistan to Russian remained cotton (47.3 %), fruit and nuts (19.4 %), albuminoidal substances, modified starches, glues, enzymes (5.7 %). However, in 2022 new categories of Tajikistan's exports to Russia appeared that had not been registered earlier such as copper and articles of copper (2492 thousand dollars), books and other products of the printing industry (1993 thousand dollars), ores, slag and ash (1935 thousand dollars), tanning or dyeing extracts (8093 thousand dollars), artificial fabrics (192 thousand dollars), raw hides and skins (139 thousand dollars), soap and washing preparations (160 thousand dollars). Moreover, 2022 saw sharp increases in Tajikistan's exports to Russia of aircraft and their parts (in 43 times), of inorganic chemicals, organic or inorganic compounds of precious metals, rare-earth metals (in 15.7 times), knitted or crocheted fabrics (in 5.9 times), locomotives, roiling stock, railway or tramway track fixtures (in 5 times), made-up textiles (in 5 times), nuclear reactors, boilers, machinery and mechanical appliances (in 4.2 times). Accordingly, Tajikistan became a conduit of parallel imports to Russia, though to a lesser degree than Kazakhstan, Uzbekistan and Kyrgyzstan. It also increased the exports of traditional light industry products.

Russian exports to Tajikistan were growing in 2021-2022, with the Russian share of Tajikistan's imports being 30.7 %, or 1585.7 million dollars, in 2022[29]. Major categories of Russian exports to Tajikistan in 2022 were mineral raw (39.4 %), timber, articles of timber and charcoal (11.7 %), iron and steel (7 %), animal and vegetable fats and oils (5.4 %)[30].

From January to August 2023 the trade turnover between Russia and Tajikistan reached 1.1 billion dollars, 3.1 % more than for the relevant period of 2022. By comparison, Tajikistan's trade with Germany increased twofold, trade with the US in 1.8 times, with Belarus by 39.3 %, with China by 8.7 %[31]. From January to October 2023 the trade turnover between Russian and Tajikistan amounted to 1.35 billion dollars, 2.1 % less than for the relevant period of 2022. The shares in Tajikistan's imports of Russia, China and Kazakhstan were around 26.6 %, 20.9 % and 15.3 % respectively. These three countries provide for more than 60 % of Tajikistan's imports. Major destinations of Tajikistan's exports were Switzerland (29.9 %), Kazakhstan (14.8 %), and China (14.6 %), with Russia accounting

---

[27] Trade turnover between Uzbekistan and Russia grew by 14.5 % within 7 months // TASS, 04.10.2023. URL: https://tass.ru/ekonomika/18906699
[28] Export destination countries, 1993-2022. URL: https://stat.tj/ru/tables-external-sector
[29] Import origin countries, 1993-2022. URL: https://stat.tj/ru/tables-external-sector
[30] Bilateral trade between Tajikistan and Russian Federation. URL: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c762%7c%7c643%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1
[31] Turkmenistan – Russia trade turnover exceeds 1 billion dollars in 2023. URL: https://tass.ru/ekonomika/18964563

for only 7.5 % of Tajikistan's exports[32]. Although Russia is still a significant supplier of goods to Tajikistan, the Russian market is not crucial for Tajikistan's exports. However, it is planned to increase the turnover due to greater exports of metal structures and building materials[33].

In 2020-2021, major categories of Russian exports to Turkmenistan were unspecified goods (34.8 % in 2021), articles of iron and steel (8.5 %), animal and vegetable fats and oils (7.8 %), nuclear reactors, boilers and other appliances (5.3 %), pharmaceuticals (4.7 %)[34]. In 2020, Russia's share of Turkmenistan's imports was around 20.1 %, the second largest after Turkey's (24.4 %)[35]. In 2020-2021, major categories of Turkmenistan's imports to Russia were vegetables and roots (32.4 % in 2021), plastics and articles thereof (20.8 %), cotton (17 %), made-up textile articles (11.2 %)[36].

In 2022 the trade turnover between Russia and Turkmenistan amounted to more than 1.6 billion dollars[37]. According to the Russian data, major categories of exports to Turkmenistan were machinery, equipment and vehicles, foodstuff and agricultural raw, chemicals, metals and their articles. Major categories of Russian imports from Turkmenistan were textiles and footwear, foodstuff, chemicals and rubber[38]. Within the first 10 months of 2023 the trade turnover between Russia and Turkmenistan grew by 11.6 % as compared to the relevant period of the previous year, a fact that experts explain by the increased trade flows from Iran to Russia via Turkmenistan[39].

Against this backdrop the importance of the Central Asian countries, in particular of Kazakhstan, as a transportation hub began to grow, allowing the Russian business to continue working under sanctions[40]. However, Central Asia suffers from the insufficient transport and warehouse

[32] Russia provides for major volumes of imports to Tajikistan for 10 months. URL: https://tass.ru/ekonomika/19420731
[33] Russia and Tajikistan increase their trade turnover with building materials. URL: https://tj.sputniknews.ru/20231018/russia-tajikistan-tovarooborot-stroymaterialy-1059997891.html
[34] Bilateral trade between Turkmenistan and Russian Federation. URL: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c795%7c%7c643%7c%7cTOTAL%7c%7c%7c2%7c1%7c2%7c2%7c2%7c1%7c1%7c1%7c1%7c1
[35] Import origin countries. URL: https://infotrade.gov.tm/menu/16?l=ru
[36] Bilateral trade between Turkmenistan and Russian Federation. URL: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c795%7c%7c643%7c%7cTOTAL%7c%7c%7c2%7c1%7c2%7c2%7c2%7c1%7c1%7c1%7c1%7c1
[37] Article by the Ambassador Extraordinary and Plenipotentiary of the Russian Federation to Turkmenistan I.K. Volynkin for the Russia Day. URL: https://turkmenistan.mid.ru/home/-/asset_publisher/ZAJDCURhDPSR/content/stat-a-crezvycajnogo-i-polnomocnogo-posla-rossijskoj-federacii-v-turkmenistane-i-k-volynkina-ko-dnu-rossii
[38] Russia – Turkmenistan trade turnover grows to $171,1 million in the first quarter of 2022. URL: https://tass.ru/ekonomika/14878223
[39] Russia – Turkmenistan trade turnover increases by 11.6 % because of intensive trade development in the East branch of the North-South transport corridor. URL: https://www.newscentralasia.net/2023/11/27/tovarooborot-mezhdu-rossiyey-i-turkmenistanom-vyros-na-116-v-svyazi-s-burnym-razvitiyem-torgovli-po-vostochnoy-vetke-transportnogo-koridora-sever-yug/
[40] On Kazakhstan's role as logistics center see e.g.: Drobot E.V., Makarov I.N., Kolesnikov V.V., Zhidkov N.S. Formation of New System of Transport and Logistics Infrastructure as an Indispensable Component of Russia's and Asian Countries' Economic Growth // Central Asian Economy. 2023. Volume 7. № 1. P. 37–48; Go to the East: why Central Asian countries have become a trend in logistics // RBC, 17.05.2022. URL: https://trends.rbc.ru/trends/industry/626b8b709a7947d0e334ccfc?from=copy

infrastructure, lack of carriers and low number of experts[41]. Anti-Russian sanctions and the subsequent reorientation of trade flows have given an impetus to the development of infrastructure in Central Asia. The regional countries try to make use of the situation both to increase the volumes of transit and trade and to attract foreign investments into infrastructure projects. The key player in this area is China which gives loans for the development of transport infrastructure under the "Belt and Road" Initiative[42]. However, the implementation of wide-scale connectivity projects is hindered by political contradictions and the growing competition for trade flows and investment among the Central Asian countries. While political contradictions have been typical for the region since the 1990s, economic competition has intensified in the recent years, especially between Kazakhstan and Uzbekistan.

After leaving the Russian market, some Western companies relocated to Central Asia which resulted in the upsurge of production in several industries, such as light and food industries in Kyrgyzstan and manufacturing industries in Kazakhstan and Uzbekistan[43]. These industries are largely oriented to the Russian market, but they have a potential for further expansion to other Asian markets.

3.2. Investment

The Central Asian countries have traditionally been recipients of investments, including of Russian investments. By 2021, the Russian investment stock in Central Asia totaled almost 50 billion dollars, with the major recipients being Kazakhstan (36 billion dollars) and Uzbekistan (about 10 billion dollars)[44]. In 2022 the inflow of Russian direct investment into Central Asia was estimated at more than 3.6 billion dollars[45]. Accordingly, by 2023 Russia remained the largest investor in the CIS and the EAEU. In 2023, Russin businesses invested in 12 projects in Eurasia totaling 1.1 billion dollars[46].

In 2022 Central Asia succeeded in attracting 10 billion dollars of foreign direct investment, which is 39 % more than in the previous year. Kazakhstan was the leader in investment, with the net inflow of 6.1 billion dollars. Uzbekistan was in the second place, with the FDI net inflow of 2.5 billion dollars[47]. Russia and China were the largest investors in the region.

[41] What problems do logistics companies face starting business in Central Asia? URL: https://trans.ru/news/s-kakimi-problemami-stalkivayutsya-logisticheskie-kompanii-otkrivaya-biznes-v-tsentralnoi-azii
[42] Mikhailov G. Central Asia: competition or cooperation? URL: https://ru.valdaiclub.com/a/highlights/tsentralnaya-aziya-konkurentsiya-ili-sotrudnichestvo/
[43] Ibid.
[44] Volume of Russian assistance to Central Asian countries reached about 3 trillion rubles within the recent 3 years. URL: https://tass.ru/ekonomika/11421837
[45] Central Asian countries' investments in Russian economy grow fourfold in 2022. URL: https://www.interfax.ru/business/901627
[46] EDB Monitoring of Mutual Investments – 2023. P. 13. URL: https://eabr.org/upload/iblock/82b/EDB_2023_Report-5_Monitoring-of-Mutual-Investments_rus.pdf
[47] Ibid., p. 12.

Kazakhstan has become the most attractive country for investment in Eurasia. In particular, Russia is active in investing in the country, with the stock of Russian investment in Kazakhstan reaching 13 billion dollars in the first half of 2023. The total volume of Chinese investment in Kazakhstan reached about 41.9 billion dollars by the first half of 2023. The stock of Turkish investment in Kazakhstan is more than 2.6 billion dollars[48].

In 2022-2023, major transactions of Russin investors were the acquisition by *Rosatom* of the Stepnogorsk Mining and Chemical Combine (the transaction value is estimated at 1.6 billion dollars) and *EuroChem* Company's investment into the construction of a mineral fertilizer plant in the Zhambyl Region of Kazakhstan (the transaction value is estimated at 160 million dollars). In 2022, the Russian *Technonicol* company started building a stone wool plant in Kazakhstan (71 million dollars), announcing the plans to build a second plant by March 2024[49]. Jn 2022, the *Tatneft* company invested about 197 million dollars in the butadiene rubber joint venture with *KazMunayGas*. In total, the company plans to invest 1 billion dollars in this project within five years. In 2023, the Russian petrochemical *SIBUR* company invested 456 million dollars in the polyethylene plant construction in Kazakhstan. A joint venture is planned, with the shares of SIBUR, KazMunayGas and Samruk-Kazyna Trust constituting 40 %, 49.9 % and 10.1 % respectively[50]. In 2022-2023, the Russian *Ultrastab* company invested 4,1 billion dollars[51] in geosynthetic fabric manufacturing in Atyrau[52]. In early 2023, the Russian hosting provider *RuVDS* opened data centers in Astana and Almaty, investing about 0.7 million dollars[53]. In summer 2023 the Russian marketplace *Ozon* announced the plans to build a logistics hub in Kazakhstan by the end of the year and to expand the network of pickup points in the country[54]. The projected investments are estimated at 33.3 million dollars[55]. Accordingly, in 2022-2023 it was not only not only in the traditional raw materials sector but also in new productions and infrastructure that Russia invested in Kazakhstan.

These investments counterbalanced the exit of Russian banks from Kazakhstan in 2022 when *Alfa-Bank* sold its subsidiary *Alfa-Bank Kazakhstan* to *CenterCredit* Bank[56] and *Sberbank* sold its

[48] Ibid, pp. 27, 43, 46.
[49] Ibid, p. 14.
[50] "Sibur" and "KazMunayGas" will invest $7.6 billion in a gas chemical project in Kazakhstan. URL: https://www.vedomosti.ru/business/articles/2023/05/15/975144-sibur-kazmunaigaz
[51] EDB Monitoring of Mutual Investments – 2023. P. 25.
[52] Vaziev T. Two new plants open in Atyrau. URL: https://rusgc.ru/about/news/v-atyirau-otkryilos-srazu-dva-proizvodstva
[53] EDB Monitoring of Mutual Investments – 2023. P. 28.
[54] Ozon and Wildberries expand investments in Kazakhstan and Uzbekistan. URL: https://tribune.kz/ozon-i-wildberries-usilivayut-investitsii-v-kazahstan-i-uzbekistan/
[55] Ozon will build a 3 billion rubles logistics complex in Kazakhstan. URL: https://www.interfax.ru/business/913316
[56] Alfa-Bank sells its subsidiary in Kazakhstan to the CenterCredit Bank. URL: https://www.vedomosti.ru/business/news/2022/05/06/921126-u-podsanktsionnoi-kazahstanskoi-dochki-alfa-banka-nashelsya-pokupatel

Kazakhstani subsidiary to the national government-controlled holding *Baiterek*[57]. Nowadays, among Russian banks only *VTB* has a subsidiary in Kazakhstan, *VTB-Kazakhstan*.

Kazakhstan benefited from increased geopolitical tensions as foreign companies relocated from Russia to Kazakhstan, a process spurred by the policy of simplifying legal procedures for relocations. The examples are the US motorcycle producer *Ural Motorcycles* that moved from Irbit (Russia) to Petropavlovsk (Kazakhstan), the mobile game developer *Playrix* and the online bank *Tinkoff*[58].

Turkish investments in Kazakhstan concentrate in trade and hotel businesses[59]. As of September 2023, Turkish companies were investing in 36 projects in Kazakhstan estimated at more than 2.8 billion dollars[60]. In 2023, the preparation of project documents for sugar production in the Aktobe Region and tomato paste production in the Kyzylorda Region, for the construction of a 250 MW TPP and a multi-profile hospital in Kokshetau and for the building of a mining and processing complex for the enrichment of chromite in the Abai Region started[61].

The Chinese investments in Kazakhstan concentrate in the raw materials sector and in the development of wind energy. In 2022, the preparation of the project documents for the “Sastobe” innovation complex in the Turkestan Region, for the sodium production in the Kyzylorda Region and for the building of a multi-profile hospital in Shymkent started. In 2023, the list of the projects with the Chinese participation that were at the initial stage of document preparation expanded to include the car production *Great Wall Motors* in Almaty and the production of ultra-thin glass for smartphones and platelets in the Kyzylorda Region. In 2023, the financing of the construction of a mining and processing plant for the titanium production in the Kyzylorda Region began[62].

Within Central Asia Kazakhstan is the major investor in neighboring countries. Among top investors are *Kaz Minerals*, *United Cement Group*, *People’s Bank* and *Verny Kapital*. The Kazakhstani companies the *PTC Holding* and *TGS Energy Limited* plan several investment projects in logistics and alternative energy for 3 to 5 years in Georgia, Uzbekistan and Kyrgyzstan totaling 120 million dollars. In 2023, *PTC Holding* announced its plans to invest about 70 million dollars in the construction of logistics center on the Kazakh-Uzbek border by 2026[63].

---

[57] Sberbank sells its subsidiary in Kazakhstan to a local holding. URL: https://www.forbes.ru/finansy/475077-sberbank-prodast-docku-v-kazahstane-mestnomu-upravlausemu-holdingu
[58] EDB Monitoring of Mutual Investments – 2023. P. 22.
[59] On cooperation in trade and economy between Kazakhstan and Turkey. URL: https://clck.ru/37Shf2
[60] 36 projects for 2.8 billion dollars are implemented in Kazakhstan with Turkish investors. URL: https://kapital.kz/economic/118981/v-kazakhstane-realizuyet-sya-36-proyektov-na-2-8-mlrd-s-uchastiyem-turetskikh-investorov.html
[61] The National Pool of Investment Projects. URL: https://invest.gov.kz/ru/services/pool-of-investment-projects/
[62] Ibid.
[63] EDB Monitoring of Mutual Investments – 2023. Pp. 14, 32.

Kazakhstan invests in Russia as well. In 2022, the Kazakh copper producer *Kaz Minerals* invested 577 million dollars in the development of the Baim ore zone in the Chukotka autonomous district[64]. The raw materials sector remains the most attractive for investments in Russia. At the same time anti-Russian sanctions compelled the Kazakh investors to withdraw capital from the Russian financial sector. In particular, in late 2022 the *People's Bank of Kazakhstan* sold its *Moskommertsbank* subsidiary for 15.8 million dollars[65].

As Uzbekistan's both domestic-oriented and export-oriented production expands, the country attracts substantial foreign investments. At the end of 2022 Russia was the largest investor in Uzbekistan with the share of 20.3 %. Most investments, including those of *Lukoil*, *Gazprom* and *Tatneft,* go into oil and gas industry[66]. The Russian marketplace *Wildberries* plans to invest about 137.5 million dollars into a logistics hub in the Ferghana Valley[67]. In December 2022, *Sberbank* applied for the registration of trademarks *Sber* and *«Сбер»* in Uzbekistan which might indicate the Bank's intention to develop its network in the country[68]. Besides, Uzbekistan hosed some of the companies relocated from Russia, including the IT-companies *iTechArt* and *EPAM*.

China also expands its investments in Uzbekistan, in particular in infrastructure, energy, and mining. In December 2022 it was announced that the Chinese consortium *GD Power – Powerchina* had won a tender for building a solar power station in Uzbekistan[69].

Within Central Asia, Uzbekistan is the second largest investor after Kazakhstan. The trend to growing Uzbek investments in the neighboring countries has been visible since 2016.Major Uzbek investors are *Artel*, the producer of household appliances, and the Association of light industry companies *«Alliance Textile»*. In the second half of 2022 *Artel* launched a household appliance production project in Karaganda estimated at 52.5 million dollars.[70] The Uzbek car maker *UzAuto Motors* plans to produce *Chevrolet Onix* in Kazakhstan for deliveries to the Russian market. In May 2023 the SKD assembly began, since 2024 a complete KD production will be launched at the *SaryarkaAvtoProm* plant in Kostanay[71].

---

[64] Ibid. Pp. 6-8.

[65] Halyk Bank sells Russian subsidiary Moskommertsbank for 1.1 billion rubles. URL: https://www.kommersant.ru/doc/5874758

[66] EDB Monitoring of Mutual Investments – 2023. P.29.

[67] Ozon and Wildberries expand investments in Kazakhstan and Uzbekistan. URL: https://tribune.kz/ozon-i-wildberries-usilivayut-investitsii-v-kazahstan-i-uzbekistan/

[68] Sberbank decides to register trademarks Sber and «Сбер» in Uzbekistan. URL: https://rb.ru/news/sberbank-uzbekistan/?utm_source=yxnews&utm_medium=desktop&utm_referrer=https%3A%2F%2Fdzen.ru%2Fnews%2Fsearch%3Ftext%3D

[69] Rogozhin A.A. Chinese Expansion in Uzbekistan: Economic Aspects // Analysis and Prognosis. IMEMO RAN Journal, 2023, № 2, p. 49-54.

[70] EDB Monitoring of Mutual Investments – 2023. Pp. 21, 25.

[71] Onix production begins in Kazakhstan. URL: https://www.autostrada.uz/onix-nachali-proizvodit-v-kazahstane/

The other Central Asian countries, Kyrgyzstan, Tajikistan and Turkmenistan, are investment recipients. Kyrgyzstan has traditionally attracted investments in mining, tourism and agriculture, Tajikistan – mostly in mining, but is also interested in investments in energy, light and food industries, and agricultures. In 2022, Tajikistan managed to attract about 430 million dollars of investments, mostly in mining. Turkmenistan is active in attracting investments in gas and chemical industries[72]. Besides, in 2023 the Turkish company *Bursali* began building a textile factory in Turkmenistan, with the investment of almost 22.5 billion dollars[73].

Thus, Russia continued to invest actively in Central Asia in 2022-2023. Russian investments went both to the raw materials sector and the manufacturing industries, in particular in Kazakhstan. Though Russian banks had to withdraw from Kazakhstan, Sberbank seeks the opportunities to enter the Uzbek market. Kazakhstan and Uzbekistan expand their investments in Central Asian countries, as do foreign players topped by China. By the second half of 2023 Chinese investment stock in Central Asia exceeded Russia's in 2.3 times (55.9 billion dollars vs. 23.8 billion dollars)[74]. Both Rusia and China prioritize raw materials sectors, so the competition between them would intensify, with China having much better long-term prospects. By 2023, China invested in Kazakhstan much more actively than in Russia[75].

Against the background of rapidly declining foreign investments in Russia in 2022 and the barrage of sanction packages, the reverse trend of growing Central Asian investments in Russia became visible. In 2022 the inflow of investments from the Centra Asian countries to Russia increased fourfold. In total, it reached almost 4 billion dollars[76]. Nevertheless, the investment potential of the Central Asian countries remains limited, and it cannot be expected that their investments would be able to replace those from the West. The search for other foreign investment sources and internal reserves will be of utmost importance for Russia in the coming years as the country needs to modernize its production and technology base and to secure its long-term development prospects.

3.3. Labor Migration

Traditionally, Russia has attracted labor migrants from the Central Asian countries. A visa-free regime between Russia and all of Central Asia except Turkmenistan facilitates labor migration. Along with visas, citizens of Turkmenistan have to receive work permits. Citizens of Tajikistan and of Uzbekistan enjoy visa-free entries to Russia, but have to receive patents permitting labor activities in the territory of a concrete region (Federation unit) of Russia. Citizens of Kazakhstan and of

---

[72] EDB Monitoring of Mutual Investments – 2023. Pp. 36-37.
[73] Turkish company *Bursalı* opens textile production in Turkmenistan. URL: https://clck.ru/37SkA5
[74] EDB Monitoring of Mutual Investments – 2023. P. 10.
[75] Ibid. P. 47.
[76] Central Asian countries' investments in Russian economy grow fourfold in 2022. URL: https://www.interfax.ru/business/901627

Kyrgyzstan which are EAEU member states do not need visas and patents to work in Russia except for certain categories of employees[77].

Table. Number of citizens of Central Asian states in possession of documents permitting labor activities in Russia at the end of the year, 2019-2022[78]

Country	2019	2020	2021	2022
Kazakhstan	191	147	170	281
Kyrgyzstan	1 179	1 141	1 230	1 253
Tajikistan	495 052	327 096	737 581	761 365
Turkmenistan	604	401	191	345
Uzbekistan	1 039 160	669 333	1 235 111	1 222 281

The statistics above shows that in 2022 the number of documents allowing their holders to work in Russia increased by 1.9 % for Kyrgyzstan, by 3.2 % for Tajikistan, by 65.3 % for Kazakhstan and by 80.6 % for Turkmenistan. This number decreased by 1 % for Uzbekistan. Accordingly, the Russian labor market remained attractive for these countries' citizens despite the economic difficulties Russia faced.

Data on the intra-EAEU migration for 2022 show an upsurge in immigration to Armenia (in more than 5 times) and to Kyrgyzstan (in more than 1.5 times) from the other EAEU countries as compared to 2021. The inflows came mostly from Russia where the number of migrants to the other EAEU countries tripled (from 75 000 to 228 000)[79]. For the first time in five years, Armenia and Kyrgyzstan had the positive net migration rate with the other EAEU countries in 2022 while Russia finished the year with the negative net migration rate[80].

Labor migration is densely connected with the migrants' money transfers to home countries. According to the Russian Foreign Ministry's data, from 2013 to 2018 citizens of the Central Asian countries transferred more than 55.2 billion dollars from Russia to their home countries[81]. The data

[77] Labor market. URL: https://new.cisstat.org/social-labour

[78] Monitoring of the Commonwealth of Independent States national labor markets. Pp. 28-29. RL: https://new.cisstat.org/documents/20143/840037/Monitoring_labour2019-2022.pdf/17782753-2708-ef78-ab7b-9cd41e41036f?t=1700464670795

[79] Statistical Yearbook of the Eurasian Economic Union. Pp. 39-41. URL: http://www.eurasiancommission.org/ru/act/integr_i_makroec/dep_stat/econstat/Documents/Stat_Yearbook_2023.pdf

[80] Ibid. P. 42.

[81] Russia and Central Asia. URL: https://www.mid.ru/ru/foreign_policy/vnesnepoliticeskoe-dos-e/problematika-prostranstva-sng/rossia-i-problemy-central-noj-azii/

for 2021 show that Uzbekistan was the largest recipient of money transfers. By a wide margin, it was followed by Tajikistan and Kyrgyzstan.

Table. Migrants' money transfers from Russia to Central Asian countries, 2021, million dollars[82]

	Kazakhstan	Kyrgyzstan	Tajikistan	Turkmenistan	Uzbekistan
Money transfers	184	2018	2307	1	9198

Because of anti-Russian sanctions, the relocation of Russian businesses and employees abroad and the continued labor migration from the Central Asian countries to Russia, the volumes of money transfers from Russia to foreign countries were growing from April 2022 to May 2023. In 2022, about 775.4 million dollars were transferred from Russia to Kazakhstan. The transfers to Kyrgyzstan totaled more than 2.7 billion dollars[83]. In 2022, money transfers from Russia to Uzbekistan reached 14.5 billion dollars[84].

The volumes of money transfers from Russia to the Central Asian countries in 2022 – early 2023 were higher than in the previous years due to relocations of businesses and employees to the region[85]. However, tens of thousands of students from the regional countries, in particular from Kazakhstan, study in Russia, so there are regular money transfers of physical entities from Central Asia to Russia as well. Traditionally, volumes of non-repayable money transfers of physical entities from Kazakhstan to Russia have been higher than the volume of transfers moving in the opposite direction. This tendency is still in place. Nevertheless, in 2022 there was an upsurge in the volumes of money transfers from Russia to Kazakhstan, probably accounted for by the emigration of Russian citizens to Kazakhstan. Besides, currency controls compelled some labor migrants to rely increasingly on the official channels of money transfers, with part of transfers moving out of the grey zone[86].

[82] Bilateral remittance matrix. URL: https://www.knomad.org/data/remittances
[83] Transfers from Russia to neighboring countries shrink for the first time since March 2022. Why the outflows to the near abroad have fallen. URL: https://www.rbc.ru/finances/13/07/2023/64ad47299a79475a155abb64?from=copy
[84] The volume of money transfers to Uzbekistan sets a record of $16,9 billion in 2022. URL: https://www.gazeta.uz/ru/2023/01/26/transfers/
[85] Remittances Remain Resilient but Are Slowing. Migration and Development Brief 38. P. 16-18. URL: https://www.knomad.org/sites/default/files/publication-doc/migration_and_development_brief_38_june_2023_0.pdf
[86] Money transfers from Russia to the neighboring countries increase by hundreds of percent. URL: https://www.vedomosti.ru/finance/news/2023/01/28/960805-denezhnie-perevodi-iz-rossii-v-sosednie-strani-uvelichilis-na-sotni-protsentov

Table. Volume of person-to-person transfers between Russia and Kazakhstan, 2019 – the first half of 2023, million dollars[87]

	2019	2020	2021	2022	The first half of 2023
From Russia to Kazakhstan	206,92	110,31	62,89	195,28	45,39
From Kazakhstan to Russia	418,65	494,41	537,58	312,89	128,35

The picture of money transfers to Kyrgyzstan is reverse: traditionally, the volume of transfers from Russia to the country has been higher than in the opposite direction. However, in 2022 the volumes of money transfers from Kyrgyzstan to Russia increased sharply, which is apparently a consequence of the relocation of businesses to Kyrgyzstan.

Table. Volumes of physical entities' money transfers through transfer systems

	2019	2020	2021	2022	January- October 2023
From Russia to Kyrgyzstan	2 358,4	2 324,7	2 690,7	2 780,2	1 463,9
From Kyrgyzstan to Russia	547,6	474,4	542,6	927,5	324,2

Despite the difficulties faced by the Russian economy, labor migration from Russia to the Central Asian countries continued in 2022-2023. A reverse trend has also emerged, the emigration of Russian employees to Central Asian countries stimulated by the mobilization and business relocations. These changes influenced the dynamics of money transfers. In 2022, money transfers from Russia to Central Asia increased, but by mid-2023 this tendency apparently petered out.

3.4. Natural Gas

Since the 1990s Russia has imported gas from Central Asia for internal demand, exporting the large volumes of its own gas to Europe[88]. Despite the new sanctions against Russia, the long-term gas

[87] Person-to-person transfers (physical entities' nonrepayable money transfers). URL: https://www.nationalbank.kz/ru/news/platezhnyy-balans-vn-sektora
[88] Kazantsev-Vaisman A. Divergent flows: why Russia faces difficulties in setting up the gas alliance in Central Asia. URL: https://www.forbes.ru/mneniya/482368-rashozdenie-potokov-pocemu-rossii-trudno-sozdat-gazovyj-souz-v-central-noj-azii

contracts did not allow the European countries to halt the Russian deliveries abruptly. However, the UK banned the imports of Russian liquified gas at the end of 2022[89]. In late December 2023, the EU institutions worked out a scheme allowing the member states to limit Russian gas imports to provide for national security or the security of the EU[90] which has not yet been approved[91]. Accordingly, Russia had to look for new gas markets. Central Asia found itself in the focus of Russian attention, as the region demonstrates a growing demand for gas and has the opportunities to deliver it further beyond Central Asia.

The dynamics of gas production and consumption varies significantly across the Central Asian countries. The gas production is gradually reduced in Uzbekistan which faced gas shortages in the winter of 2022-2023[92]. The production decline is accounted for by both the exhaustion of the exploited gas deposits and the reduced interest of investors resulting from low government-controlled internal gas prices and limited export opportunities. Similar reasons account for the stagnating gas production in Kazakhstan. However, these countries intend to stimulate the gas production in the nearest future.

In May 2023, it was announced that the new formula of calculating the wholesale gas price would be applied in Kazakhstan. It was specified in the memoranda signed between *QazaqGaz* and the gas producing companies. The new formula allows the companies to sell gas at a price two or three times higher than the current average price (at 110-120 US dollars instead of 40-50 US dollars). Thus, the country hopes to attract investments to the gas industry[93].

In September 2023, Uzbekistan's Ministry for Energy started the discussion of the draft Government's decree on the gradual introduction of market instruments into the energy sector. First and foremost, it was envisaged that the gas and electricity prices would be liberalized for large enterprises, state-financed organizations and legal entities[94]. On October 1, gas prices for these categories of consumers were increased in 2.3 – 2.7 times[95]. Gas prices for individual consumers remained unchanged, but the enterprises are likely to make up for their increased expenditures by raising process on their goods and services.

[89] The Russia (Sanctions) (EU Exit) (Amendment) (No. 15) Regulations 2022. URL: https://www.legislation.gov.uk/uksi/2022/1110/regulation/6/made

[90] Gas package: Council and Parliament reach deal on future hydrogen and gas market. Press-release. URL: https://www.consilium.europa.eu/en/press/press-releases/2023/12/08/gas-package-council-and-parliament-reach-deal-on-future-hydrogen-and-gas-market/

[91] Budris A. Gas ban: how Europe fights against the Russian LNG. URL: https://www.forbes.ru/biznes/502355-gazovyj-zapret-kak-evropa-boretsa-s-rossijskim-spg

[92] Salikhov M. Op. cit.

[93] Fakhrutdinov A. QazaqGaz increases wholesale prices for gas from new fields to stimulate production. URL: https://kz.kursiv.media/2023-05-15/lbrt-qazaqgaz/

[94] Increase in electricity and gas prices for organizations is planed from October 1. URL: https://www.gazeta.uz/ru/2023/09/09/tariffs/

[95] Electricity and gas tariffs for businesses will grow from October. URL: https://www.spot.uz/ru/2023/09/16/tariffs-raise/

Meanwhile, Kazakhstan and Uzbekistan have been purchasing greater gas volumes from Turkmenistan. Due to increased production, Ashgabat meets the growing domestic needs and supplies the neighboring countries' markets. Kyrgyzstan and Tajikistan are minor producers and consumers of natural gas[96]. Turkmenistan is the top gas exporter in Central Asia. However, analysts doubt that the country would be able to meet all of its obligations and contracts to export gas to China, India, Pakistan, Iran and Azerbaijan[97]. Besides, the Central Asian countries buying Turkmen gas would seek the diversification of supplies, including at the expense of increased deliveries from Russia. Nevertheless, in late 2022 as well as in August 2023, Ashgabat and Tashkent concluded short-term contracts for gas deliveries from Turkmenistan to Uzbekistan. It was planned to sign a long-term contract by the end of 2023, but no announcement to this end has so far been made [98].

Russia also seeks increased gas deliveries to Central Asia because of the closure of the European market, though gas exports to Central Asian countries are less profitable than to Europe. Though the *Central Asia – Center* gas pipeline built in the 1960s can pump gas in both directions, the energy cooperation among the post-Soviet countries has traditionally been complicated by the frayed infrastructure and contradictions about prices[99]. For a long time the gas prices in the region remained at the level of 100 dollars for cubic meter, but they began to grow sharply in 2022-2023[100].

Though the idea of a gas alliance of post-Soviet countries is not new and emerged as early as in 2002[101], Russia began to push actively for the trilateral alliance with Kazakhstan and Uzbekistan since the late 2022. However, the three countries turned out to have different points of view on this initiative. Unlike Kazakhstan and Uzbekistan, Russia saw it as essentially a political project. As Kazakhstan is closer connected to Russia through the EAEU framework, it did not exclude coordinating gas policies. Uzbekistan regarded the potential gas alliance as a purely commercial project[102].

In June 2023 the formal conditions for the trilateral cooperation were laid out. The head of Gazprom Aleksei Miller and the Uzbek minister of energy Jurabek Mirzamakhmudov signed a contract for Russian gas deliveries to Uzbekistan and a roadmap for appropriate preparations of the Uzbek gas

[96] Kondratiev S. In deficit and no longer cheap. URL: https://itek.ru/analytics/deficitnyj-i-uzhe-ne-deshevyj/
[97] Ibid.
[98] Russia and Central Asia build a Eurasian gas market. URL: https://e-cis.info/news/566/112536/
[99] Salikhov M. Op.cit.
[100] Kondratiev S. Op.cit.
[101] Aramov Zh. The gas alliance of Russia, Kazakhstan and Uzbekistan: costs and benefits for Uzbekistan. URL: https://cabar.asia/ru/gazovyj-soyuz-rossiya-kazahstan-uzbekistan-izderzhki-i-vygody-dlya-uzbekistana
[102] Kazantsev-Vaisman A. Op. cit.

transportation system. According to the latter, 56 km of pipelines were to be repaired in Uzbekistan and 22 km were to be built[103].

Since October 2023 Russian gas began to be transported via the *Central Asia – Center* pipeline through Kazakhstan, as stipulated by the contract signed between *Gazprom* and *QazaqGaz*. The two-year contract set the volume of deliveries at 2.8 billion cubic meters per year[104]. In late 2023 *Gazprom* announced its plans to sign long-term contracts for gas deliveries and transportation with Kazakhstan, Kyrgyzstan and Uzbekistan in 2024[105]. However, the countries still have different approaches to gas cooperation: Kazakhstan and Uzbekistan are cautious about it for a number of reasons varying from the danger of secondary sanctions to a potential Russian control over the Central Asian gas transportation system[106]. Gazprom has already monopolized gas imports to Kyrgyzstan and has taken control over its gas distribution network[107]. The rhetoric of the countries' leaders changed, with the term "gas alliance" replaced by "energy project"[108].

Nevertheless, in the short-term and mid-term perspectives this cooperation can be beneficial for all the sides. Kazakhstan and Uzbekistan will be able to satisfy the growing domestic demand for gas at the expense of Russian deliveries and to modernize their gas infrastructure with Russia' help while Gazprom will diversify its gas exports.

3.5. The EAEU in the System of Russia's Foreign Economic Relations

In 2022 Kyrgyzstan chaired the EAEU governing bodies. On January 1, 2022 the EEC Council Decision of 14.09.2021 № 80 "On Adopting the common Commodity Nomenclature of Foreign Economic Activity of the Eurasian Economic Union and the Common Customs Tariff of the Eurasian Economic Union…" entered into force amending the CN FEA EAEU[109]. In 2022, out of the remaining 11 obstacles in the EAEU internal market three were removed[110]. The mutual trade of the EAEU member states grew by more than 13 % and reached about 74 billion dollars[111].

---

[103] Uzbekistan agrees with *Gazprom* on gas deliveries. URL: https://www.vedomosti.ru/economics/news/2023/06/19/981119-uzbekistan-dogovorilsya-s-gazpromom-o-postavkah-gaza

[104] Russia begins gas deliveries to Uzbekistan through Kazakhstan. URL: https://tass.ru/ekonomika/18934949

[105] Savenkova D., Volobuev A. *Gazprom* tries to replace the unsold exports with deliveries to Central Asia. URL: https://www.vedomosti.ru/business/articles/2023/11/02/1003812-gazprom-pitaetsya-zamestit-vipavshie-obemi-eksporta

[106] Aramov Zh. Op. cit.

[107] Savenkova D., Volobuev A. Op. cit.

[108] Aramov Zh. Op. cit.

[109] Decision of the EEC Council of 14.09.2021 № 80 " On Adopting the common Commodity Nomenclature of Foreign Economic Activity of the Eurasian Economic Union and the Common Customs Tariff of the Eurasian Economic Union as well as on Amending and Annulling Certain Decisions of the Council of the Eurasian Economic Commission". URL: https://www.alta.ru/tamdoc/21sr0080/

[110] On the Priorities of Russian Chairmanship in the Eurasian Economic Union in 2023. URL: https://ecuador.mid.ru/ru/informatsiya_o_deyatelnosti_evraziyskogo_ekonomicheskogo_soyuza_eaes/

[111] The EAEU countries mutual trade growth in 2022 is measured. URL: https://eurasia.expert/stalo-izvestno-naskolko-vyrosla-vzaimnaya-torgovlya-stran-eaes-v-2022-godu/

In May 2022 the first Eurasian Economic Forum took place. Bishkek held it online because of the pandemic aftershocks. The Forum formulated suggestions and recommendations on a number of issues ranging from the infrastructure development to the EAEU future and from the digital agenda to the "green" technologies[112].

The mutual trade is complicated by administrative barriers. From time to time, bottlenecks occur at checkpoints on the Kazakh-Kyrgyz border because of slow and meticulous inspection of goods by the Kazakh officials. Though the problem has become chronic, the EAEU has not succeeded in changing the situation, which stimulates discussions on the search for alternative ways to transport goods from Kyrgyzstan to Russia that would bypass Kazakhstan[113].

The EAEU allows the member states to develop cooperation with third countries both under the Union's aegis and bilaterally. Due to the fact that in December 2020 Uzbekistan became an observer state at the EAEU and regular interaction between the EEC and the country's government began, Uzbekistan occupied the leading position among the EAEU's trade partners in the CIS[114]. In 2022 the trade turnover between the EAEU states and Uzbekistan grew by almost 27 %. Besides, in 2022 the shares of such countries as China, India, the UAE and Iran increased in the EAEU's trade turnover (the interim free trade area agreement with Iran entered into force in late 2019). The trade turnover between the EAEU and Cuba increased as well (the Memorandum of understanding between the EEC and Cuba was signed in 2018). Along with that, 2022 saw the beginning of the formalization of the EAEU's relations with the UAE (the EEC – UAE Government dialogue), Myanmar and Laos[115]. In 2023 negotiations on free trade areas with the UAE and Indonesia started. On December 25, 2023 the free trade agreement with Iran was signed.

In 2023 the EAEU chairmanship passed to Russia. The priorities for 2023 were defined as development of the technologic potential, promoting digital transformation, agricultural development, establishing common energy markets, harmonization of fiscal markets, levelling the competitive playing fields for member states' companies. In May 2023 the second Eurasian Economic Forum was held where the heads of the member states confirmed their commitment to intensifying cooperation both within the EAEU and with Asian and African countries. The potential of the "North – South" transport corridor was discussed. Within the Forum's framework a number of events with

---

[112] Main theses of the First Eurasian Economic Forum "Eurasian Economic Integration in the Epoch of Global Changes. New Opportunities for Investments". URL: https://eec.eaeunion.org/upload/medialibrary/253/itogovaya-rezolyutsiya_EEF.pdf

[113] The EAEU Court will resolve the disputes on the Kyrgyz-Kazakh border. URL: https://www.rg.ru/2023/12/06/sud-razberetsia-s-incidentami.html

[114] Sergey Glaziev: «Uzbekistan leads among the EAEU trade partners in the CIS». URL: https://eec.eaeunion.org/news/sergey-glazev-uzbekistan-zanimaet-pervoe-mesto-sredi-torgovykh-partnerov-eaes-v-sng/

[115] The EAEU increases the number of international partners in 2022. URL: https://eec.eaeunion.org/news/eaes-uvelichil-kolichestvo-mezhdunarodnykh-partnerov-v-2022-godu-/

the participation of Indonesian authorities and businesses was organized, underlining Indonesia's prospects as the EAEU's partner[116]. In June 2023 the Intergovernmental Council approved the plans of the "East – West" and "North – South" transport corridors development[117] and appointed the operator of centralized electric power trade on a day-ahead basis in the EAEU common electric power market, the Russian company *Administrator of the Trading System of the Wholesale Electric Power Market* [118].

In October the Intergovernmental Council approved "The Rules for Mutual Trade in Electric Power of the Common Electric Power Market of the Eurasian Economic Union" that will enter into force on January 1, 2025. In the area of promoting industrial cooperation the Council approved the Regulation on selecting joint cooperation projects in industries and providing financial support for their implementation by the Eurasian Economic Union states. It sets out the procedure and criteria for selecting joint industrial projects as well as the industries where such projects can be implemented.

A cooperative project may be considered for selection if its participants are enterprises of three or more Union states and the product's country of origin is one of the Union states. The timeframe for the project's implementation must not exceed five years. The project must result in one of the following: creating a new joint industrial enterprise or a technical update / modernization of an existing enterprise and creating new jobs; making a new value-added chain; increasing exports of the production to third countries; increasing the intra-EAEU trade or investments[119].

The Regulation will enter into force after the depositary, the Eurasian Economic Commission, receives from the member states the last of the five notifications on the completion of the necessary internal procedures.

In November 2023 the Council of the Eurasian Economic Commission approved the Agreement on the common system for customs transit between the Eurasian Economic Union and third party (third parties) which must simplify and optimize the transportation procedures through the use of a single transit declaration in the electronic form, the use of navigation seals for monitoring the transportation of goods along the entire route of transportation as well as through the mutual

[116] Results of the II Eurasian Economic Forum. URL: https://forum.eaeunion.org/news/itogi-ii-evraziyskogo-ekonomicheskogo-foruma/

[117] Results of the Eurasian Intergovernmental Council Meeting, June 7-8, 2023. URL: https://eec.eaeunion.org/news/itogi-zasedaniya-evraziyskogo-mezhpravitelstvennogo-soveta-7-8-iyunya-2023-g/

[118] EIGC decides on the operator of centralized electric power trade on a day-ahead basis in the EAEU common electric power market. URL: https://eec.eaeunion.org/news/emps-prinyal-reshenie-ob-operatore-tsentralizovannoy-torgovli-elektroenergiey-na-sutki-vpered-na-obshch/

[119] Decision of the Eurasian Intergovernmental Council of 26.10.2023 № 3 "On Adopting the Regulation on selecting joint cooperation projects in industries and providing financial support for their implementation by the Eurasian Economic Union states ". URL: https://www.alta.ru/tamdoc/23ms0003/

recognition of decisions adopted by customs authorities and of the results of customs controls. The Agreement was forwarded to the EAEU member states for internal legal procedures[120].

On December 25, 2023 the meeting of the Supreme Eurasian Economic Council took place in St. Petersburg. On the Russian initiative the heads of the member states signed the Declaration on further development of economic processes within the EAEU until 2030 and for the period until 2045. The document points out the following major directions of development until 2030:

- providing the EAEU common market with key goods and resources and its efficient functioning through removing barriers, expanding trade and economic relations, development of infrastructure and improving the regulation in the relevant areas;
- forming a common space of cooperative interaction and cooperation in the field of technological development through improving the business climate, developing mechanisms and instruments of supporting cooperative projects financially, developing the countries' interaction in the areas of "smart" energy technologies;
- forming a common transport and logistics space through coordinating national efforts at infrastructure development, implementing joint infrastructure projects, simplifying and digitalizing customs administration, developing a single system of customs transit in the EAEU, liberalizing international transport of goods by road;
- forming a common financial market through providing non-discriminatory access to member states' financial markets, wider usage of national currencies in mutual trade payments, mutual recognition of credit ratings assigned by national credit rating agencies;
- developing economic cooperation in the fields with integration potential, in particular in services, providing medical care to employees from the EAEU member states and their family members, tourism, recycling and reusage of wastes, developing statistical agencies, mobile communications, promotion of the EAEU's positive image;
- the EAEU functioning as a pole of economic attraction in the international arena through developing its relations with third countries and the EAEU's global positioning[121].

The Eurasian Economic Commission was instructed, jointly with the member states' representatives, to elaborate and submit for approval in 2025 a draft Roadmap for implementing the Declaration[122]. The text of the Declaration reveals that the document reflects both the EAEU's traditional agenda, i.e. the development of common markets and trade and economic cooperation among member

---

[120] A common system for customs transit between the EAEU and third countries is established. URL: https://eec.eaeunion.org/news/sozdaetsya-edinaya-sistema-tamozhennogo-tranzita-eaes-i-tretikh-stran-/

[121] Declaration on further development of economic processes within the EAEU until 2030 and for the period until 2045 "Eurasian Economic Path". URL: https://docs.eaeunion.org/docs/ru-ru/01443175/ms_26122023

[122] Decision of the Supreme Eurasian Economic Council № 6 of 25.12.2023 «On the Plan of Measures ("Roadmap") for the implementation of the Declaration on further development of economic processes within the EAEU until 2030 and for the period until 2045 "Eurasian Economic Path". URL: https://docs.eaeunion.org/docs/ru-ru/01243168/err_26122023_6

states, and the priorities of the Russian chairmanship in the EAEU, such as the development of technological potential, promoting digital transformation and building a common financial market.

The cooperation within the EAEU framework turned out to be one the first foreign economic instruments that Russia tried to use to mitigate the consequences of the sanctions. Ambiguous positions of the EAEU partner states on anti-Russian sanctions and a wide range of substantive and technical questions that have to be coordinated on the EAEU's platform undermine the efficiency of trade and economic cooperation within this grouping. Nevertheless, the barriers to cooperation are gradually removed, though it will probably take more time under the current international conditions.

4. HUMANITARIAN COOPERATION: SOFT POWER AND HARD REALITIES

4.1. Kazakhstan

In 2022-2023, the conditions for the development of humanitarian cooperation between Russia and Kazakhstan became less favorable. The main reason for this shift is the deepening divergence between the Russian and Kazakhstani elites in the estimates of crucial international political trends that are of existential importance for Russia.

The beginning of 2022 promised a quite different dynamic. Higher education was referred to as one of the major areas of bilateral cooperation during the visit of Kazakh President to Russia in February 2022. On February 24, 2022 the intergovernmental Agreement on the creation and functioning of branches of Russian higher education establishments in the Republic of Kazakhstan and of branches of Kazakhstani higher educational establishments in the Russian Federation was signed. Plans were announced to open in Kazakhstan the branches of MEPhI, MISiS, Bauman MSTU, the Russian State University of Oil and Gas, Mendeleev University of Chemical Technology of Russia, Novosibirsk State University, Tomsk State University, Russian State Social University and St. Petersburg Polytechnic University.

However, the launch of the SMO and the sanctions imposed on Russia by the US and its allies, including the sanctions in the area of humanitarian cooperation, brought about a substantial change in the strategic context within which Kazakhstan’s policy in the area of higher education was developed. Astana began to shift its policy in the area of international higher education cooperation toward prioritizing the expansion of cooperation with the US, the EU countries, the UK, Turkey, the Republic of Korea and China over the cooperation with Russia. In 2022-2023, the branches of a US, a British, a Korean and an Uzbek university as well as of a consortium of German universities were opened in the country (previously, there was only one branch of a non-Russian university in Kazakhstan – the branch of the British De Montfort University opened in 2021). Plans were announced to open the branches of a Canadian, a Turkish, a Bulgarian, two US and two Chinese universities as well as the Kazakh-French University. From the long above-cited list of Russian university branches that had been in the offing in early 2022 only two materialized. In September 2022, the branches of MEPhI at Kazakh National University and of the Russian State University of Oil and Gas at Atyrau University of Oil and Gas were opened. The Russian- Kazakh agreement on creating university branches did not enter into force until April 2023 as Kazakhstan delayed its ratification. In 2023 no new branches of Russian universities appeared in Kazakhstan. For 2024, the opening of the branch of the University of Chemical Technology in Taraz is planned.

The number of Kazakhstani citizens studying at Russian universities went down. In 2021, about 70 000 students from Kazakhstan studied in Russia, in 2023 their number fell to 61 000. Astana launched a campaign to promote the Central Asian Higher Education Area (CAHEA) that implied, first and foremost, the acceptance of the Bologna system by the other regional countries. Kazakhstan saw Russia's difficulties in the international arena and Russia's exit from the Bologna system as an opportunity to increase the attractiveness of the national higher education system. The President of Kazakhstan commented on the issue personally. He noted that he "understood" Russia's decision to leave the Bologna process and acknowledged that the Bologna system had "many shortcomings" but underlined that Kazakhstan was not going to follow Russia's suit and the Russian decision would have "negative consequences" as well[123]. In July 2022 Kazakhstan's minister for science and higher education Saysat Nurbek stated that, in view of the events in Russia, Kazakhstan expects "a rather substantial inflow both of our citizens who will return to seek educational opportunities and of other states' citizens"[124]. According to the Ministry's estimates, more than 2500 students transferred from Russian to Kazakhstani universities between May and mid-September 2022[125]. Commenting on the mass inflow of Russian citizens to Kazakhstan in late September 2022, Minister Nurbek stated that the opportunity emerged to strengthen the cadre of Kazakh universities "at the expense of our colleagues who are just in search for stable positions to continue their research"[126].

In fact, in 2022-2023 Kazakhstan began to move from the model of international educational cooperation that largely relied on cooperation with Russia to the model that implied competing with Russia both for its own students and for school graduates from other Central Asian countries. It is noteworthy that the Concept of higher education and science development for 2023-2029 approved by the Kazakh government in March 2023 does not mention educational and scientific cooperation with Russia as a priority or a matter of importance.

As previously, Kazakhstan's language policy was aimed at a gradual reduction of the areas where the Russian language is applied. In spring 2023 the Kazakh President made a number of program statements on language policies. The problem of the proficiency in the Kazakh language by all the country's citizens was called a "strategic" one. In the words of K.-Zh. Tokayev, "learning the state language, seeking to gain proficiency in it must become an everyday norm….proficiency in the state language, in particular in the native Kazakh language, is an indicator of how culturally advanced a citizen is, how developed his sense of social responsibility is, and, in the final analysis, how patriotic he is". It was declared that "the Kazakh language must become a means of familiarization with the best achievements of scientific progress and education"[127].

---

[123] Tokayev says Kazakhstan will not refuse from the Bologna system. URL: https://www.rbc.ru/politics/15/06/2022/62a9a8219a79472dcdbe3d10

[124] Kazakhstan expects a big inflow of students from abroad. URL: https://www.inform.kz/amp/kazahstan-ozhidaet-bol-shoy-potok-studentov-iz-za-rubezha_a3954330/

[125] More than 2500 students transfer to Kazakhstani universities from Russia and Ukraine. URL: https://www.inform.kz/ru/svyshe-2-5-tysyach-studentov-perevelis-v-kazahstanskie-vuzy-iz-rossii-i-ukrainy_a3982487

[126] Bologna reforms in CA will be implemented by special bureau. URL: https://24.kz/ru/news/obrazovanie-i-nauka/item/567232-bolonskie-reformy-v-tsa-budet-prodvigat-spetsbyuro-vysshego-obrazovaniya.

[127] «Learning the state language, seeking to gain proficiency in it must become a norm». URL: https://www.business-gazeta.ru/article/592090

Following the President's guidance, in October 2023 the Kazakh government adopted the Concept of the language policy development for 2023-2029. It sets out the following objectives: by 2029, the share of population proficient in the Kazakh language must increase from 81 % to 84 %; share of the written communication's participants using the Latin alphabet will make up 15 %; share of Kazakh language school graduates with the B2 level of language skills will grow from 40 % to 75 %; share of officials with the B2 level of Kazakh language skills will increase from 35 % to 41 %; share of the Kazakh language content in state-sponsored mass media will increase from 77 % to 90 %. The concept envisages the instruments of removing the Russian language from the area of academic research and postgraduate education, such as introducing the mandatory minimum of Kazakh language papers where the results of dissertation research must be reflected as well as the similar mandatory minimum for academic publications supported by state grants. It is planned to publish a series of the specific terminology dictionaries and to attract professionals from higher education and academic institutions to implementing this project. Putting forward the initiative of the International Organization for the Russian Language, the Kazakh president emphasized that this idea "does not imply creating an alternative for the language policy of the state».

In the area of international scientific cooperation, the Kazakh Ministry for science and higher education declared the interaction with the EU's Framework programs on science, technology and innovations a priority. It is telling that in spring 2023, when the Astana IT University hosted the first meeting of the Presidential national council on science and technology and the week of science with the lectures of leading foreign physicists and biologists, not a single Russian scientist was invited.

While academic cooperation with Russia in natural and technical sciences is carried out at least because it is impossible, in the mid-term, to replace Russian partners with those from the West, Turkey or China, in the social sciences and the humanities the Kazakh state promotes a number of approaches that go against the values of most Russian researchers. Thus, the State commission for the complete rehabilitation of the victims of political repressions discussed the rehabilitation of the "Turkestan Legion" members and of the activists of the Basmachi movement. The interpretation of the Asharshylyk, the famine of 1932-1933, that is contradictory to the dominant Russian interpretation of the event have become commonplace.

The milestones of the Russian – Kazakh cooperation in culture were the Days of Kazakhstani culture in Astrakhan, Kazan and Moscow, the "Russian Seasons" in Kazakhstan, the days of Russian cinema in Kazakhstan and of the Kazakh cinema in Russia. However, the concerts of a number of Russian pop artists in Kazakhstan were cancelled because of their support for the SMO; as the Kazakh minister for culture and information said, «the concerts for our society should promote the art itself, not the politics".

The problems of bilateral humanitarian cooperation were discussed during President Putin's visit to Kazakhstan in November 2023. K.-Zh. Tokayev mentioned that «the opportunities for the *reciprocal* opening of the branches of Kazakh and Russian universities in our countries were considered" while the Russian leader underlined Russia's readiness to open the branches of «*our* universities" in Kazakhstan[128]. It was announced that the project of building three Russian-Kazakh schools with enhanced teaching of Russian in the Turkestan, Kyzylorda and Zhambyl Regions of Kazakhstan would be launched. The Kazakh leadership emphasized its interest in cooperating in this area on an equal footing, i.e. in the opening of the equal number of schools specializing in teaching the Kazakh language in the Russian regions bordering Kazakhstan with significant Kazak populations.

On the whole, the fundamental factors accounting for the high level of Russian-Kazakh humanitarian cooperation continue to be in force. The number of Kazakhstani students studying in Russia is more than six times higher than the number of Kazakh citizens studying for higher education degrees in China and Turkey, the countries that follow Russia as major destinations of educational migration of young people from Kazakhstan. In Russia, students from Kazakhstan are the largest contingent of foreign students. The Russian universities have six branches in Kazakhstan, which equals the combined number of the branches of third countries' universities. Kazakhstan remains a bilingual country. Russian continues to be the dominant language of lawmaking, legal proceedings and business records. 17 % children of Kazakh ethnicity attend Russian-language schools and almost a third of university students study in Russian. In 2022, 63 % of dissertations in Kazakhstan were written and defended in Russian. The changes in the humanitarian track of Russia – Kazakhstan relations in 2022-2023 that we have noted are so far superficial, and their cumulative effect has not transformed into a negative trend.

4.2. Uzbekistan

The international crisis of 2022-2023 did not influence the Russian-Uzbek cooperation in the humanitarian area that had been on the sharp rise since the beginning of Sh.M. Mirziyoyev presidency. Especially active is the two countries' cooperation in the area of higher education within the framework of Uzbekistan's policy of its "total internationalization"[129]. Activities aimed at developing the network of Russian university branches in Uzbekistan continued, though facing material, technical, organizational and other difficulties. At present, out of 30 branches of foreign universities in Uzbekistan 14 are branches of Russian universities. All of them were opened either before 2022 or later, but on the basis of decisions made prior to 2022[130]. In 2022-2023, media published information about the possible opening of up to seven new branches of Russian universities, but these branches are yet to materialize. A process of opening and developing

[128] President of Russia and President of Kazakhstan make press statements. URL: http://kremlin.ru/events/president/news/72706
[129] Troitskiy E.F., Yun S.M. Uzbekistan: New Milestones of Higher Education Internationalization // Vysshee obrzovanie v Rossii. 2021. Vol. 30. № 10. P. 157-168. URL: https://vovr.elpub.ru/jour/article/view/3040/1729
[130] Pogorelskaya A.M., Kobzeva O.P. Foreign Universities at the Higher Education Market of Uzbekistan // Vestnik Tomskogo gosudarstvenogo universiteta. Istoriya. 2023. № 83. P. 191–198. URL: https://journals.tsu.ru/engine/download.php?id=260839&area=files

branches in Uzbekistan is very costly for Russian universities, probably making the financial support of the Russian government imperative.

Russian universities are leaders in the number of joint education programs with Uzbek universities[131], but since the academic year 2021-2022 the relevant activities of Uzbek universities showed a downward dynamic because of the Uzbek students' insufficient knowledge and skills, including the level of Russian language proficiency. The levels of professors' and students' mobility are on the increase, as is the number of joint projects implemented by Russian and Uzbek universities. Uzbek authorities try to dilute Russia's prevalence in the foreign contacts of national universities with cooperation with the countries of Europe, Asia, the Middle East, the US as well as by stimulating the learning of foreign languages, in particular of English. The inevitable drop of Russian universities in international rankings will result in their declining access to various instruments of support provided by the Uzbek authorities, as these support mechanisms use global rankings as indicators. E.g., receiving a grant from Uzbekistan's national "El-Yurt Umidi" Foundation for studies abroad requires that the chosen university was among the top 300 of at least one of the rankings, QS, THE or ARWU.

Russia remains the main destination of Uzbek citizens' educational migration, though the number of school graduates from Uzbekistan enrolled in Russian universities was declining: by 4 % in 2022 and by 23 % in 2023 (enrolment for bachelor, specialist and master programs combined). Accordingly, as of the beginning of the academic year 2023-24, the total contingent of students from Uzbekistan decreased by 7.9 % and numbered 53 400[132]. This trend is accounted for by the general negative information background connected with the SMO rather than by an anti-Russian information campaign pf any kind in Uzbekistan where the authorities control public activities and sentiments tightly and follow the line of neutral coverage of the relevant events[133]. The Uzbek authorities do not hinder the Russian universities' education fairs, professional orientation meetings, entrance exams, their opening of resource centers at Uzbek universities. In 2022-2023, the Russian Government quota for free education for Uzbek citizens was doubled and reached 800 enrolments for 2023.

The previously launched major projects aimed at promoting education in Russian in Uzbekistan at other levels, such as "Class" (school education) and "Malysh" (pre-school education), go on

[131] Sergey Yun. Belarussian Universities in Uzbekistan: The Main Competitor for Russian Universities? TSU Center for Eurasian Studies. Analytic review # 7. August 27, 2020. P. 6. URL: http://eurasian-studies.tsu.ru/analitika/publikatcii/sergei-iun-vuzy-belorussii-glavnyi-konkurent-rossiiskikh-vuzov-v-uzbekistane/

[132] Calculated on the basis of Russian universities' reports submitted as "The Form # VPO-1 "Information on the Organizations Carrying Out Educational Activities Under Educational Programs of Higher Education: Bachelor Programs, Specialist Programs, Master Programs" published in the aggregate form on the website of the Russian Ministry for Higher Education and Science. URL: https://www.minobrnauki.gov.ru/action/stat/highed/

[133] "Sanctions have already hit the region". How the conflict in Ukraine changed the attitude to Russia in Central Asian countries. URL: https://lenta.ru/articles/2023/03/13/chizhova/

(https://classzur.ru/). The implementation of the "Class" project in 2022 was provided by 120 Russian teachers of the Russian language and other subjects working at schools in Uzbekistan. Uzbekistani educational organizations continue to participate in the international program "Ambassadors of the Russian language in the world" implemented by the Pushkin State Russian Language Institute (Pushkin Institute)[134]. At the same time bilateral interaction at the level of vocational education remains undeveloped.

The mechanisms supporting the research and educational cooperation between Russia and Uzbekistan continued functioning. The most recent, fifth meeting of the Subcommittee on Science and Education of the Intergovernmental Commission on Economic Cooperation (ICEC) took place on September 26, 2023. In October 2023 the Russian Ministry for Higher Education and Science and the Uzbek Ministry for Higher Education, Science and Innovation signed the interagency Joint Action Plan on higher education, science and innovation that envisages, in particular, carrying out joint research (which is a weak spot in bilateral relations), developing a roadmap for joint engineering and technical education programs, cooperating in the enrolment of Uzbek citizens in Russian universities[135]. The university administrations of the two countries continued their interactions: in October 2023 the Third Russian-Uzbek Educational Forum and in September 2023 the Fourth Interregional Conference of the University Rectors of Russia and Uzbekistan were held. However, the special financial mechanisms that could allow for the competition-based support of the joint research of the two countries' academics are still lacking. On the Russian side, such mechanism could be operated by the Russian Science Foundation.

The Russian-Uzbek cooperation in the area of culture develops intensively, supported by the activities of the ICEC Subcommittee on Culture. It is exemplified by guest performances, the cooperation between libraries, museums, organizations of cinematography. The Days of cinema are held on the reciprocal basis, in 2022 the Conference of museum curators of Russia and Uzbekistan was launched, in 2023 the "Russian Seasons" in Uzbekistan were held for the first time. The latter included about 40 events, such as theatre performances, exhibitions, concerts, master classes of the leading Russian institutions of culture[136]. The humanitarian cooperation is facilitated by the growing number of joint youth events and the tourist flow from Russia to Uzbekistan. According to the Russian Foreign Affairs Ministry, 567 700 Russian tourists visited Uzbekistan in 2022 which is three times more than in the previous year. In the first half of 2023, the number of Russian tourists visiting

---

[134] Ambassadors of the Russian language in Uzbekistan. URL: https://pushkininstitute.ru/news/14818

[135] The interagency Joint action plan on higher education, science and innovation is signed between the Russian Federation and the Republic of Uzbekistan. URL: https://www.minobrnauki.gov.ru/press-center/news/novosti-ministerstva/73969/?sphrase_id=8015829

[136] «Russian Seasons» in Uzbekistan are concluded by Valeriy Gergiev's concert. URL: https://culture.gov.ru/press/news/russkie_sezony_zavershilis_v_uzbekistane_kontsertom_valeriya_gergieva/?sphrase_id=915956

Uzbekistan increased in 1.9 times as compared to the relevant period of 2022 and reached 345 000 [137].

At the same time a complicated problem of bilateral relations is the historical memory of the 19th and 20th centuries, the time when Russia and Uzbekistan shared a common statehood. In the politics of memory there are both unifying thematic areas, such as the Great Patriotic War, and the controversial topics that require objective academic research and a respectful dialogue between the two countries' academic communities that would not depend on the politicized internal and external discourses[138]. Both Russia and Uzbekistan are interested in establishing the network of permanently functioning dialogue platforms of historians and other researchers of social and humanitarian profile.

4.3. Kyrgyzstan

In 2022-2023, the Kyrgyz authorities continued to pursue the policy aimed at deepening humanitarian relations with Russia. This policy focuses on education and strengthening the positions of the Russian language. Within the Russian Ministry of Education project "Russian Teacher Abroad" 116 Russian teachers of the Russian language and literature, physics, mathematics, chemistry, biology, IT and elementary school taught at 51 Kyrgyz schools in the academic year 2022-2023. Since September 1, 2023 120 teachers have been working at 51 schools in Kyrgyzstan[139]. Kyrgyzstan's participation in the program "Ambassadors of the Russian Language in the World" continued as well[140].

In March 2023 Russia and Kyrgyzstan signed an agreement on the conditions of building, establishing and functioning in Kyrgyzstan of nine joint Russian-language secondary schools, in Bishkek, Osh, and seven regions (Chu, Osh, Issyk-Kul, Jalal-Abad, Talas, Batken and Naryn). According to the Russian Ministry of Education, these schools will teach on the basis of the two countries' combined educational standards. The Russian standard will form the basis of educational process and will be supplemented by national and cultural components[141]. It is planned to open the first three schools in September 2025. Subsequently, three schools will be opened every year. By 2029, more than

[137] Russia – Uzbekistan: the interstate relations. URL: https://ria.ru/20231005/otnosheniya-1900511470.html

[138] Communication Regimes of the Neighboring Countries. The amicability ranking – 2022. Report on the results of annual monitoring. M.: NIIRC, 2023. P. 36. URL: https://nicrus.ru/wp-content/uploads/2023/03/Коммуникационные-режимы-соседних-стран-2022.pdf

[139] In the new academic year 120 teachers will teach at 51 schools in Kyrgyzstan under the project "Russian Teacher Abroad". URL: https://edu.gov.ru/press/7457/v-novom-uchebnom-godu-120-pedagogov-budut-prepodavat-v-51-shkole-kirgizii-v-ramkah-proekta-rossiyskiy-uchitel-za-rubezhom

[140] What the schoolchildren told the Russian language ambassadors in Kyrgyzstan. URL: https://e-cis.info/news/566/111617/

[141] Joint Russian – Kyrgyz schools will contribute to strengthen friendship and cooperation between Russia and Kyrgyzstan. URL: https://edu.gov.ru/press/6768/sovmestnye-rossiysko-kirgizskie-shkoly-budut-sodeystvovat-ukrepleniyu-druzhby-i-sotrudnichestva-mezhdu-rossiey-i-kirgiziey

11000 pupils will get education at nine schools[142]. The cost of building one school is estimated at 450-500 million rubles.

According to the Pushkin Institute's estimate, in 2022 Kyrgyzstan had the second position among the post-Soviet countries in the index of the Russian language resilience, in 2023 it was ranked third after Belarus and Kazakhstan[143]. The positions of the Russian language in Kyrgyzstan in various spheres will be undermined by the implementation of the Law "On the State Language of the Kyrgyz Republic" signed by the country's President S.N. Japarov on July 17, 2023. In particular, the law makes the Kyrgyz language proficiency mandatory for administrators and employees of all the educational establishments without exceptions, state and municipal officials, medical workers of state and municipal health care establishments, judges, prosecutors and defense lawyers[144]. As a preventive measure it is recommended to increase the number of financial mechanisms supporting the mobility of young teaching staff and students, professional communication and experience exchange projects (in particular, professional trainings in Russia) between Russia and Kyrgyzstan.

In the area of higher education an important role in the two countries' cooperation belongs to the Kyrgyz-Russian Slavic University (KRSU). In September 2023 a new KRSU rector was appointed and on October 12, 2023 Russia and Kyrgyzstan signed an updated agreement on the KRSU activities which should facilitate "the accelerated modernization" of the University[145]. The new rector D.V. Fomin-Nilskiy stated that one of the current KRSU priorities will be the opening of the Pedagogical Faculty that will educate teachers in all the basic school subjects with the mandatory requirement of the teachers' bilingualism[146]. In the recent years, the leading Russian universities have expanded their presence in Kyrgyzstan. In May 2023, the "Lomonosov" Center was opened in Osh at Osh State University (OshSU). The Center will implement joint programs of OshSU and MSU. In October 2023 the President of Kyrgyzstan signed a decree on the opening of MSU branch in Karakol[147]. The Forum of Russian and Kyrgyz University Rectors continued its activities, with the third meeting held in October 2023 in Osh. In June 2022 the second Forum established the Association of Russian and Kyrgyz Universities. The development of the Russian universities' branch network in Kyrgyzstan requires even greater financial support of the Russian government than in Uzbekistan.

---

142 On September 1 the project of building nine Russian-Kyrgyz schools in Kyrgyzstan was launched. URL: https://edu.gov.ru/press/7450/startoval-proekt-stroitelstva-v-kirgizskoy-respublike-devyati-rossiysko-kirgizskih-shkol

143 Index of the Russian language position in the world-2023: expert assessment. URL: https://www.youtube.com/watch?v=1t5qXW-O_dQ

144 The Constitutional Law "On the State Language of the Kyrgyz Republic" is signed. URL: https://president.kg/news/all/24396

145 What will change at the KRSU – Kyrgyzstan and Russia sign new agreement. URL: https://ru.sputnik.kg/20231012/kygyzstan-rossiya-krsu-soglashenie-1079405917.html

146 How the Kyrgyz – Russian (Slavic) University will develop. URL: https://rg.ru/2023/10/25/lechit-bolno-no-neobhodimo.html

147 Branches of Russian universities open in Kyrgyzstan. URL: https://rg.ru/2023/10/18/universitety-prihodiat-v-stranu.html

The Russian Government quota for free education of Kyrgyzstani citizens in Russian universities was increased from 370 in 2020 to 1000 in 2023. Russian universities remain the prime foreign destination for Kyrgyz school graduates. In 2022, the enrolment from Kyrgyzstan increased by 2 %, in 2023 it decreased by 10.6 %. At the beginning of the academic year 2023-2024, the total contingent of Kyrgyz citizens studying at Russian universities was 8800 (a decrease by 8.4 %). In Kyrgyzstan, where the political regime is more liberal as compared to the other regional countries, the US Agency for International Development and other Western donors increased the funding of anti-Russian NGOs and mass media that work to project Russia's negative image and depict the consequences of Russia's actions in Ukraine as catastrophic[148]. On the Russian side, the number of the long-term "smart" public diplomacy projects must be increased.

Kyrgyzstan and Russia maintain intensive interactions in the area of culture. In 2022, the Russia – Kyrgyzstan cross years prolonged because of the coronavirus pandemic were closed. In 2023, the reciprocal Days of Culture were continued. A museum forum of the two countries is planned for 2024[149].

At the same time, although the Russian vector is a priority, the Kyrgyz authorities continue to pursue the "open doors" policy in the humanitarian sphere, expanding the relations with Turkey based on the common Turkic identity, with the countries and institutions of Europe, China, Central Asian neighbors and other states. Under these conditions, Russia should continue to invest in the quality of Russian-language education in Kyrgyzstan. Cooperation in vocational training might become one of the new aspects of bilateral relations.

4.4. Tajikistan

In 2022-2023, the humanitarian cooperation between Russia and Tajikistan did not undergo significant changes and even intensified in the area of education. The latter demonstrated remarkable progress due to the opening of new Russian-language schools. On September 1, 2022 five new schools with teaching in Russian were opened in Tajikistan in accordance with the 2019 Intergovernmental Agreement[150]. These schools are located in Dushanbe (school named after Yu. Gagarin), Bokhtar (Lomonosov school), Khujand (Chekhov school), Tursunzade (Mendeleev school), Kulyab (Ushinsky school). 25 % of teaching staff must be provided by the Russian side, 75 % - by the Tajik side. As of August 2023, the schools provided teaching to 4830 children and employed 283

[148] Troitskiy E.F. US Policy in Central Asia: inertia and innovation. TSU Center for Eurasian Studies, 2023. URL: https://eurasian-studies.tsu.ru/analitika/publikatcii/evgenii-troitckii-politika-ssha-v-tcentral-noi-azii-inertciia-i-novatcii/; Who rocks the boat? Thunderclaps of information wars in Kyrgyzstan. URL: https://rg.ru/2023/08/16/kto-raskachivaet-lodku.html

[149] Ministries of Culture of Russia and Kyrgyzstan will organize a museum forum in 2024. URL: https://culture.gov.ru/press/news/minkultury_rossii_i_kirgizii_provedut_muzeynyy_forum_v_2024_godu/?sphrase_id=916160

[150] Development of the Russian language and humanitarian cooperation between Tajikistan and the RF is discussed in Dushanbe. URL: https://tass.ru/politika/17447715

teachers[151]. In total, there are 60 schools in Tajikistan where teaching is carried out in Russian, 178 schools have Russian classes. More than 120000 schoolchildren in Tajikistan get secondary education in Russian, the others learn Russian as one of the subjects[152]. According to the Russian Deputy Minister of Education, in 2024 the building of an educational center for talented children in Dushanbe will start. The center's educational program will be based on the methodologies developed by the Russian "Sirius" Center[153].

The Intergovernmental Agreement between Russia and Tajikistan on the organization of pedagogical activities carried out by Russian pedagogues in the educational establishments of the general education system of the Republic of Tajikistan of November 30, 2021 entered into force In May 2022. Under the project "Russian Teacher Abroad" teachers of the Russian language and literature continued to settle in Tajikistan's distant regions. In the academic year 2022-2023, 74 teachers from Russia worked at schools in Tajikistan[154].

Many students from Tajikistan study abroad. The dynamics of their enrolment in Russian universities in recent years is noteworthy. Since 2013, the number of enrolments from Tajikistan was growing steadily, but in 2023 the enrolment fell by almost 20 %. The total number of Tajik citizens studying at Russian universities stabilized at around 29 000[155]. The Russian – Tajik (Slavic) University and the branches of three Russian universities, MSU, MISiS and MPEI are functioning in Tajikistan. All of them are active for more than 10 years. The popularity of Russian higher education has been reinforced by the increase in the number of quotas for Tajik students to 750 in 2022 and further to 900 in 2023[156]. In November 2023 after the meeting of the two countries' presidents it was announced that the quota for Tajik students will be increased to 1000[157].

Educational cooperation remains one of the most promising areas of bilateral relations. In March 2023 during the working visit of the Russian Prime Minister M.V. Mishustin to Tajikistan the intergovernmental agreements on cooperation in health care, medical education and science and on the mutual recognition of academic degrees and academic ranks[158]. The cooperation in research

[151] Russian schools in Tajikistan are fully staffed with teachers. URL: https://tass.ru/obschestvo/18422523
[152] Russia and Tajikistan: interstate relations. URL: https://ria.ru/20231013/otnosheniya-1902318326.html
[153] The center for talented children in Dushanbe. URL: https://tj.sputniknews.ru/20230718/shkola-sirius-dushanbe-1058326078.html
[154] To the forthcoming visit of the Russian Foreign Minister S.V. Lavrov to Tajikistan. Press release. URL: https://www.mid.ru/ru/maps/tj/1874047/
[155] Form # VPO-1 "Information on the Organizations Carrying Out Educational Activities under Educational Programs of Higher Education: Bachelor Programs, Specialist Programs, Master Programs". URL: https://www.minobrnauki.gov.ru/action/stat/highed/
[156] More quotas: what Russia offers the Tajik students. URL: https://tj.sputniknews.ru/20221110/russia-tajikistan-students-1052737375.html
[157] Yegorova V. Putin sums up the Russia – Tajikistan talks in the Kremin. URL: https://rg.ru/2023/11/21/putin-podvel-itogi-rossijsko-tadzhikistanskih-peregovorov-v-kremle.html
[158] Russia – Tajikistan talks. URL: http://government.ru/news/47911/

is less active. However, in June 2023 Russia and Tajikistan signed agreement on cooperation in exploration and use of outer space for peaceful purposes[159].

Despite the current international background, the rhetoric of mass media about Russia remains relatively neutral. At the official level attempts are made to preserve the historical memory. In 2022 the Law "On Perpetuation of Memory of the Fallen for the Motherland" was adopted, replacing a similar act of 1995[160]. A new chapter on financial, material and technical provisions for these activities was added to the Law[161]. The Law of 2022 envisages a wide range of activities aimed at perpetuating the memory of the defenders of the Motherland, including caring for the war graves, establishing tombstones and memorial pillars, naming settlements, streets, squares, educational establishments and military units after the fallen[162]. In 2022 the monument to the Unknown Warrior was opened in the Gorno-Badakhshan region and the monument to the Civil War hero N. Tomin was opened in Kulyab. After restoration, a monument to A.S. Pushkin was reopened in Dushanbe.

In September 2022 it was announced that Tajikistan's Center of Culture would be opened in Moscow[163], but no subsequent information followed. The Days of Tajikistani Culture were held in Russia in October 2022 to mark the 30th anniversary of the establishment of diplomatic relations between the two countries (May 25, 2023). In December 2022 Dushanbe hosted the culture forum "Russia – Tajikistan: interculture dialogue and common humanitarian space". In June 2023 the opening of the exhibition "Russian Classical Writers and the Orthodox Christianity" was attended by the visiting Foreign Minister S.V. Lavrov[164].

In June 2023 the Days of Russian Culture were held in Tajikistan. A number of events were organized such as the performances of the pianist Denis Matsuev in the Tajik State Academic Theatre of Opera and Ballet and of the State academic folk dance ensemble of Adygea "Nalmes" in Dushanbe and in Khujand, the Russian – Tajik museum forum and the exhibition of the State Central Film Museum "The sacred magic of your land"[165]. In October 2023 the international Book Fair "Book of Dushanbe"

---

159 The RF and Tajikistan sign agreement on cooperation in space. URL: https://tj.sputniknews.ru/20230619/russia-tadjikistan-soglashenie-sotrudnichestvo-kosmos-1057796873.html

160 Law of the Republic of Tajikistan of April 7, 1995 № 61 «On Perpetuation of Memory of Citizens Fallen for the Defense of the Motherland» (with amendments and additions as of 25.03.2011. URL: https://continent-online.com/Document/?doc_id=30602821#pos=0;0

161 Law of the Republic of Tajikistan of December 24, 2022 № 1919 «On Perpetuation of Memory of the Fallen for the Motherland». URL: https://online.zakon.kz/Document/?doc_id=39650714&pos=5;-106#pos=5;-106

162 The parliament of Tajikistan adopts law on perpetuation of the memory of the fallen for the Motherland. URL: https://www.asiaplustj.info/ru/news/tajikistan/society/20221108/parlament-tadzhikistana-prinyal-zakon-po-uvekovechivaniyu-pamyati-pogibshih-pri-zatshite-rodini

163 Tajikistan's Center of Culture will open in Moscow. URL: https://tass.ru/kultura/15625043

164 Statement of the Russian Foreign Minister S.V. Lavrov at the opening ceremony of the exhibition-presentation of the book series "Russian Classical Writers and the Orthodox Christianity", Dushanbe, June 6, 2023. URL: https://www.mid.ru/ru/maps/tj/1880004/

165 Tajikistan enriched with Russian culture. URL: https://pobedarf.ru/2023/07/10/tadzhikistan-proniksya-rossijskoj-kulturoj/

was opened at the National Museum of Tajikistan with the participation of Russian representatives. The Russian delegation brought more than 500 books from 30 publishing houses including the recently published "Anthology of CIS Countries Literature". Master classes and meetings with Russian writers and publishers were organized[166].

4.5. Turkmenistan

On the whole, the humanitarian cooperation with Turkmenistan remained at the previous level and saw no significant changes in 2022-2023. Formally, educational cooperation received a new impetus, but the negative trends of the previous decades do not bode well for the implementation of the current declarations.

The Russian language has been losing positions in Turkmenistan both in the social and political sphere and in education[167]. Since the 2000s, the number of Russian language schools in Turkmenistan and of the "Russian classes" in Turkmen schools has been reduced, resulting in the decrease of the number of people fluent in Russian. The Joint Russian – Turkmen Pushkin secondary school remains the crucially important center of teaching Russian in Turkmenistan. It was founded in 2002, and in 2022 it won the international competition "The best Russian school abroad"[168]. In early 2023 the visiting Russian Prime Minister M.V. Mishustin ordered to look for the opportunities to expand the school [169]. Moreover, Turkmenistan announced 2023 the Year of the Russian Language.

In late 2022 news appeared that the building of the Turkmen-Russian University should start in 2023.[170]. However, in October 2023 the Russian Deputy Prime Minister A.L. Overchuk stated that the agreement on the establishment of this university had not yet been signed[171]. It is difficult to foretell the future of this project as the country's policy vis-à-vis educational cooperation with Russia is changeable.

Many students from Turkmenistan study abroad. However, the state seeks to obstruct this process. In 2019 the rules of recognition of foreign diplomas in Turkmenistan were restricted: a list of

---

166 International book exhibition with the participation of Russian writers opens in Dushanbe. URL: https://tass.ru/kultura/18896965

167 Index of the position of the Russian language in the world. Issue 2. P. 26-29. URL: https://cis.minsk.by/img/news/24669/63bfff90826a3.pdf

168 General information. URL: http://trsosh.edu.tm/index.php?p_id=2501

169 Mishustin orders to expand the Turkmen-Russian school in Ashgabat. URL: https://realty.ria.ru/20230119/ashkhabad-1846013215.html

170 In 2023 the building of the Turkmen-Russian University will start in Ashgabat. URL: https://turkmenportal.com/blog/53633/v-2023-godu-v-ashhabade-nachnetsya-stroitelstvo-turkmenorossiiskogo-universiteta

171 RF deputy prime minister Overchuk comments on the establishment of Turkmen – Russian University. URL: https://turkmenportal.com/blog/68226/rabotu-nad-sozdaniem-turkmenorossiiskogo-universiteta-prokommentiroval-vicepremer-rf-overchuk

universities whose diplomas were to be recognized automatically was introduced. Mostly it included the leaders of world rankings. In 2023 Turkmenistan's Ministry of Education updated the list. Now it consists of 1500 universities, including 75 Russian universities[172].

The inflow of students from Turkmenistan to Russia was falling from 2020. The enrolment of Turkmen citizens was constrained both by the consequences of the pandemic and the technical and logistic difficulties it caused and by the above-mentioned restriction of foreign diploma recognition rules in Turkmenistan. On its part, Russia plans to expand the number of quotas for Turkmen citizens' enrolment in Russian universities. In 2022 their number was increased to 250, in 2023 – to 500[173]. In recent years, the number of Turkmen citizens studying at Russian universities started to grow. 2023 saw an upsurge in the number of enrolled Turkmen citizens. Their number more than doubled, from 10 000 in 2022 to almost 23 000 in 2023[174].

In 2022-2023, the bilateral cooperation in the area of culture somewhat intensified, though it still meets difficulties. In particular, *Rossotrudnichestvo* in Ashgabat functions within the Russian Embassy and has no resources to implement projects in the regions of the country. Nevertheless, in August 2022 the bureau of TASS information agency was opened in the country[175]. In June 2023 a festival dedicated to Pushkin Birthday was held in Ashgabat. It was organized by the Russian Embassy and the Russian House [176]. From June 9 to June 14, 2023 the Week of Russian Cinema and Animation was held[177]. In December 2023, Ashgabat hosted an exhibition of documents from the archives of the Russian National Museum of Music and a concert dedicated to S. Rachmaninov's 150th anniversary[178].

---

[172] The list of Russian universities whose diplomas are recognized by Turkmenistan is published. URL: https://turkmenportal.com/compositions/1513

[173] Application deadline for free education in Russia extended for Turkmen citizens. URL: https://clck.iru/376roz; Russia and Turkmenistan agree to develop cooperation in sciene and higher education. URL: https://minobrnauki.gov.ru/press-center/news/mezhdunarodnoe-sotrudnichestvo/61058/; More than 30 000 studnets from Turkmenistan study in Russia. URL: https://goo.su/WDMvKXD

[174] Form # VPO-1 "Information on the Oranizations Carrying Out Educational Activities Uner educational Progams of Higher Education: Bachelor Programs, Specialist Prograns, Master Programs". URL: https://www.minobrnauki.gov.ru/action/stat/highed/

[175] Russian Freign Minisry expects that the opening of TASS bureau in Turkmenustan willconsolidate bilateral relations. URL: https://tass.ru/politika/15447673

[176] Festival dedicated to Pushkin Birthday in Ashgabat. URL: https://rs.gov.ru/news/prazdnichnyj-festival-ko-dnyu-rozhdeniya-pushkina-v-ashhabade/

[177] The Week of Russian Cinema. URL: https://t.me/asgabatrus/585

[178] Exhibition and concert in honor of Rakhmaninov's150th anniversary held in Ashgabat. URL: https://tass.ru/kultura/19494293

5. SIBERIAN FEDERAL DISTRICT REGIONS AND CENTRAL ASIAN COUNTRIES: CROSS-BORDER AND INTERREGIONAL INTERACTIONS

Russia's cooperation with Central Asia is influenced by divergent trends that in the mid-term will form a new landscape of international and interregional cooperation. The analysis of new opportunities and risks remains a subject of intense interest for researchers, economic actors and political elites. For Siberian regions these issues are of particular importance.

From February 2022 the structural transformation of foreign trade activities in Russia began, accompanied by the inevitable imbalances of transition. Since early 2022 the regions of the Siberian Federal District which are traditional partners of Central Asian countries have been influenced by many factors making them reconsider the objectives and instruments of international cooperation. On the one hand, their geography and well-established economic and business connections with Central Asian countries have allowed them to avoid the situation of hard landing that the regions of Western and North-Western Russia faced because of their dense links with the neighboring European countries. The share of SFD regions' exports to unfriendly countries was 20 % in 2021, in some regions, such as the Tomsk Region, it was as low as 7.5 %[179]. Besides, as of 2021, out of 6000 exporters of the SFD 3500 worked with Kazakhstan, 749 with Kyrgyzstan, 653 with Uzbekistan. On the whole, 75 % of exporters worked with the CIS countries[180].

On the other hand, for Siberia the reorientation to the East had a somewhat different sense and mid-term effect. The decrease in the number of traditional markets for Russian exports quite logically resulted in stronger competition in the other markets. Central Asian countries, as markets with a low entry threshold, became one of the priorities for manufacturers from the European Russia. Along with increased interregional competition, "the turn to the East" had consequences for transport logistics. Greater eastward cargo flow impacted the accessibility of railroad infrastructure for Siberian regions. This impact became visible not only for the Eastern polygon of Russian railways, but also for the railway infrastructure of Kazakhstan. Due to the upsurge in load in early 2022, the railway operator of Kazakhstan had to impose conventional restrictions on the acceptance of certain cargo categories. To a varying degree it touched the exporters from all the Russian regions. Businesses were compelled to pay fines for demurrage to wagon owners which resulted in increased commercial costs and delays in deliveries. In particular, the exporters of timber, grain, chemicals and metals were hit.

[179] Export and import of the Siberian Federal District in January – December 2021 by major partner countries and categories of goods. URL: https://stu.customs.gov.ru/storage/document/document_file/2022-03/15/форма_6-ТС_ЭК_и_ИМ_СФО_по_странам_и_группам_товаров_2021.xls

[180] Analytics. Exports of a selected federal district. RF Federal District: Siberian Federal District. Period: 12 months of 2021. Russian Export Center, 2021. P. 35.

The trade and investment cooperation of the regions with Central Asian partners gained special importance as an instrument of mitigating the effects of the sanctions. An essential consequence of the structural transformation became **the shift of emphasis** in international trade. One of the tendencies is connected with the growing role of imports in foreign trade and the search for suppliers in local markets. The narrowing channels of priority import deliveries alongside with faster growth of demand in the Russian internal market pushed the foreign trade actors to build new cooperative chains with the partners from friendly countries. Whereas the results of 2022 were the growth of Russian export by 19 % and the decrease in import by 11.7 %[181], the preliminary results for the ten months of 2023 show a reverse picture. According to the Federal Customs Service open data, the Russian exports decreased by 28.8 % as compared to the relevant period of 2022 while the import grew by 15.6 %[182]. Paradoxically, the reasons for this situation consist in intensified imports substitution and the investment boost that set the 12-year record. The implementation of investment projects in the manufacturing sector is impossible without the modern investment and intermediary goods, such as machines, equipment, raw materials, spare parts and components, many of which ae nowadays imported from the friendly countries' markets.

According to the Bank of Russia data, from January to September 2023 investment grew by 10 % as compared to the level of the previous year and reached the record 20 trillion rubles[183]. The key contributors to the growth were the manufacturing industry, transportation and storage (including the major state-sponsored projects) and mining. Investments into transport and storage (warehouses and logistics) infrastructure reached the level of the investments in mining and exceeded 3 trillion rubles (+10,1 % to the nine months of 2022). This upsurge is accounted for by the necessity to underpin the economy's turn to the East by the transport and logistics infrastructure. Moreover, investments into transportation inevitably accrue the costs and result in the growing prices. Thus, in early 2023 the freight railway tariffs grew by 8 % (after the 17 % growth in 2022) and from December 1, 2023 by further 10.75 % (including the 2 % surcharge for the capital infrastructure repairs). In manufacturing, the main spheres of anomalous investment growth are the production of metal goods (+ 73 %), of electric equipment (+ 59 %), of machines and equipment (+ 44 %), of vehicles (+ 41 %).

The maximum utilization of the existing production capacity and the investment growth influenced the industrial production dynamics. According to the *Rosstat* data for the 10 months of 2023, the

---

[181] Foreign trade of the Russian Federation. URL: https://customs.gov.ru/storage/document/document_statistics_file/2023-03/13/AphA/%D0%9F%D1%83%D0%B1%D0%BB%D0%B8%D0%BA%D0%B0%D1%86%D0%B8%D1%8F%D0%A2%D0%A1%D0%A2%D0%92_2022.xlsx

[182] Export and import of goods by the Russian Federation by groups of countries. URL: https://customs.gov.ru/storage/document/document_statistics_file/2023-12/11/xDkM/%D1%81%D1%82%D1%80%D0%B0%D0%BD%D1%8B102023.xlsx

[183] Regional Economy. Comments of Federal District Bureaus. # 24. December 2023. URL: https://www.cbr.ru/Collection/Collection/File/46644/report_01122023.pdf

volume of industrial production grew by 5.3 %, with the main contribution to the growth provided by the manufacturing industries that demonstrate a higher-than-average growth. In the second and third quarters of 2023, the growth of 10.4 % and 10.2 %, respectively was recorded[184]. For instance, in the Tomsk Region the growth drivers were producers of electric equipment (+12.5 %) and electronics (+ 41.5 %)[185].

Tellingly, the increase in the volume of production is accompanied by the decrease of exports. In the Siberian Federal District, the 9 months of 2023 saw a 20 % decrease. As to the CIS countries, the decrease in deliveries from Siberia has been recorded for all the major categories of goods except foodstuff. Evidently, the current situation in the internal market will be a mid-term export constraining factor.

The second important tendency is that, for those companies, industries and territories where exports remain an essential part of their strategies, of prime importance becomes the task to **build their own infrastructures of presence abroad**. The authorities and businesses realized it after the sanctions had been imposed and undermined the potential of free trade and of making use of the transnational operators' potential. It became an important factor accounting for the post-2022 upsurge of the number of companies with Russian participation in Central Asia. In Uzbekistan, the number of companies with the participation of the Russian capital approaches 3000. According to the country's ambassador to Russia Botirzhon Asadov, their number doubled within the recent three years. In Kazakhstan, the number of companies with the Russian capital increased by 70 % in 2022-2023, with their total number approaching 18 000. More than 100 Russian investment projects are under implementation. In Kyrgyzstan and Tajikistan, the number of Russian companies increased by 10 %.

It has become eident that under the conditions of high uncertainty providing for a company's smooth operations in the international markets requires not the opening of a foreign company "on paper" but the establishment of physical infrastructure, i.e. supply chains and production facilities. Therefore, the Russian Ministry for Industry and Trade initiated the inclusion of the instruments of cofinancing and compensation of costs of establishing transport, logistics and industrial infrastructure in the key foreign markets into the measures of state support since 2024. It is an important innovation in Russia's industrial policy as the classic understanding of state support implies attracting investments in the national economy but not investing abroad. It should be underlined that what is implied is not the movement of assets and relocations of companies abroad but the establishment of the points of spatial localization, including those on the basis of techno

---

[184] Industrial production dynamics in October 2023. URL: https://rosstat.gov.ru/folder/313/document/224168

[185] Industrial production of the Tomsk Region in January – September 2023. URL: https://70.rosstat.gov.ru/storage/mediabank/%D0%9F%D1%80%D0%BE%D0%BC%D0%BF%D1%80%D0%BE%D0%B8%D0%B7%D0%B2%D0%BE%D0%B4%D1%81%D1%82%D0%B2%D0%BE%20%D1%8F%D0%BD%D0%B2%D0%B0%D1%80%D1%8C-%D1%81%D0%B5%D0%BD%D1%82%D1%8F%D0%B1%D1%80%D1%8C%202023.pdf

parks and industrial zones. Among the pioneers are the projects of Tatarstan's technopolis *Himgrad* that opened two industrial parks in Uzbekistan, *Chirchik* and *Jizzakh*. In 2023 another Russian-Uzbek project was launched in Jizzakh, the new agrologistics complex *BMB-NRC Agrologistics*. In 2024 it plans to join the program of accelerated railway and multimodal transportation of agricultural products "Eurasian Agroexpress". Under implementation is the establishment of an industrial park with Russian participation in Navoi. According to the chairman of the Russian – Uzbek Business Council Andrey Knyazev, at present 90 investment projects with Russian participation with the total cost of 2.7 trillion rubles are implemented[186]. The projects of establishing points of industrial presence in Tajikistan are close to completion.

It is expected that the foundations for industrial localization abroad will be laid by transport and logistics operators and the companies managing private techno parks that would attract residents. This model is particularly attractive because the Russian companies that have "landed" abroad are able to interact with the home-based managerial companies.

In parallel, **regions** develop their own points of presence. Whereas building assembly plants and logistics complexes is mostly within the grasp of big business, regional points of presence aim first and foremost at advancing the interests of small and medium businesses. Expanding the formats of presence abroad became a part of the regions' policies after these objectives had been included in the national project "International Cooperation and Export" and had been reflected in the Regional Export Standard. The regions of the Volga Federal District with advanced industries, Tatarstan and Bashkortostan, are the leaders in the development of regional offices abroad. While Tatarstan started the establishment of offices abroad in the early 1990s, Bashkortostan's foreign network was developed in the recent years. Bashkortostan uses different formats of presence abroad, such as opening its own offices, attracting representatives acting on a voluntary basis and representatives of the regional Chamber of Commerce and Industry.

The new format is the opening of regional showrooms, a way chosen by the Chelyabinsk, Tyumen and Ryazan Regions. The showroom of the Chelyabinsk Region in Uzbekistan is open permanently while Tyumen and Ryazan have implemented temporary formats when a showroom abroad is opened for a few months and the schedule of business meetings and presentations is denser. Among the **Siberian regions** only the Yenissei Siberia Development Corporation that advances the interest of three regions, the Krasnoyarsk Region, Khakassia and Tuva, has chosen to open its own offices abroad. On March 1, 2023 the Corporation's office in Kazakhstan (Astana) was opened, followed on November 28, 2023 by the office in Turkey (Istanbul). The offices' objectives are export promotion, development of cooperative projects and attraction of foreign investments. Maintaining presence abroad through permanent offices is complicated as this format needs substantial resources.

[186] 8th joint meeting of the Russian-Uzbek and the Uzbek-Russian Business Councils. URL: https://rus-ruds.tpprf.ru/ru/meetings/?CODE=8-e-sovmestnoe-zasedanie-rossiysko-uzbekskogo-i-uzbeksko-rossiyskogo-delovykh-sovetov_i516014

Therefore, the number of regional offices abroad is limited, and Siberian regions maintain their presence abroad within other frameworks, such as the advancement of their presence through the subcommittees on interregional cooperation, making use of the opportunities provided by Rossotrudnichestvo and singing “vertical agreements” between regional administrations and national governments.

The growing role of business councils as the instruments of advancing interests of companies and their clusters should be noted. The example is the participation of the Tomsk Region in the activities of the Russian – Uzbek Business Council. In 2022 the agreement between the Administration of the Tomsk Region and the Business Council was signed and a number of regional companies and organizations joined the Council. The business council membership allows the expansion of b2b contacts and the inclusion of problematic issues in the agendas of bilateral intergovernmental commissions.

The public-private partnerships when a local agent with the marketing instruments, personnel and experience in promoting goods and services becomes an operator are a promising framework pf realizing regions’ export potentials. This framework is based on self-sufficiency and benefits all the parties, being capable of functioning under the budgetary constraints and independent of the federal financial support. These suggestions are put forward by Central Asian partners and can be implemented in the foreseeable future.

As to the interest of the regions in the expansion of their presence, it should be noted that now we might witness the establishment of the basis for building a truly equal and mutually beneficial cooperation, in particular for achieving a balanced foreign trade when the Central Asian markets are seen not only as export destinations but also as a source of high value-added products and a space of industrial cooperation. The withdrawal of many industrial partners from the Russian markets has opened the spaces that Central Asian producers occupy as subcontractors. It is important to underline that local industrial goods necessary for making final products are in demand. The data for the nine months of 2023 show that the key Central Asian economies, Kazakhstan and Uzbekistan, increased their exports to Siberian markets by 20 % and 44 % respectively. This growth has been provided by intermediate goods needed by the industries, such as bearings, products of lighting and rubber industries, inorganic chemicals. In some regions it allowed for the balancing of the bilateral trade. For instance, in the Tomsk Region imports from Uzbekistan exceeded the exports of Tomsk products to this country for the first time.

Along with industrial cooperation, the most promising areas of cooperation in the nearest future are transport and logistics, energy, urban infrastructure, architecture and urban development, agriculture, information and communication technologies, and tourism. Will foreign partners be able to make use of the opportunities provided by the economic growth in the Russian regions and to hold their ground in the market when imports from the far abroad start to resume? Will they expand their presence through the development of infrastructure? The questions are open. It is the development of all kinds of infrastructure which lowers transaction costs and market thresholds that will define the scope and quality of international and interregional interactions.

6. 2024: SCENARIOS, PROSPECTS AND RECOMMENDATIONS

To draw the scenarios of the evolution of Russian policy in Central Asia in 2024 it is first and foremost necessary to single out the basic parameters that will define Russia's capacity to advance its national interests in the region. We assume that there are two basic parameters: the resistance of the external milieu, i.e. the extent of the external actors' activism which directly or indirectly hinders the advancement of Russian military-political, economic and humanitarian interests in Central Asia, and the stability of the regional subsystem of international relations. Both parameters are of course composite and multipartite. The resistance of the external milieu is defined by the direct pressure exerted by the US and its allies on the Central Asian countries with the aim of undermining Russian positions in the region, by the "soft power" toolkit they use to shape the intraregional milieu, and by the growing competition in the economic and humanitarian areas on the part of friendly and neutral countries faced by Russia in Central Asia. The stability of the regional subsystem includes both the stability of intraregional interstate relations and the socio-political stability in the regional countries. Stability is understood as dynamic stability, the capability of the regional subsystem and its elements to compensate through their reactions for the impact of external and internal sources of traditional and non-traditional threats to security.

Accordingly, four **basic** scenarios of the evolution of Russian policy in Central Asia in 2024 can be drawn:

The first scenario («inertia») is defined by the growing resistance of the external milieu whereas the regional subsystem remains stable. On the whole, this scenario assumes that the trends of 2022-2023 will continue. It allows Russia to develop the military-political, economic and humanitarian cooperation with the regional countries and to maintain the functioning of the EAEU, the CSTO and the CIS. The relations with Kazakhstan will undergo continued erosion constrained by the mutual recognition of interdependence and the unacceptably high costs of their abrupt degradation. The relations with the other countries will not change substantially.

The second scenario («**a thaw**») is defined by the lowered resistance of the external milieu whereas the regional subsystem remains stable. It might be assumed that the US administration will get so entrenched in the Middle Eastern conflict and the unprecedentedly intense election struggle that it will stop increasing pressure on Russia and will relegate the problems of Central Asia to the distant periphery. It is unlikely that the EU will be able to maintain a high level of confrontation with Russia on its own. In this case, Russia will have greater opportunities to project its interests into Central Asia and the regional countries will undoubtedly respond to the changes in external environment.

The third scenario («**a new front**») is defined by the growing resistance of the external milieu and the destabilization of the regional subsystem. The regional subsystem might be destabilized by a new socio-political crisis in Kazakhstan, the growing activism of the Islamist underground in Uzbekistan, the resumption of civil conflict in Tajikistan (for instance, in case of a failed transit of power) or the interethnic conflict in South Kyrgyzstan. However, as the recent history shows, the regional subsystem is able of coping with the local conflicts (such as the Tajik-Kyrgyz contradictions that showed a positive trend to resolution in the final months of 2023). We suppose that the regional subsystem would not be destabilized by a resumption of the civil war in Afghanistan while the problem of the Qosh Tepa Canal has good chances for a diplomatic solution. If the regional subsystem faced the threat of destabilization, Russia would be compelled to use military and economic resources rapidly to quell the sources of instability. Though Russia would undoubtedly receive China's political support, under the conditions of the SMO and the economic burden of the Western sanctions the realization of this scenario would entail exceptional difficulties and extremely high risks for Russia.

The fourth scenario («**a stabilizing role**») assumes the lower resistance of the external milieu coupled with the destabilization of the regional subsystem. In this case, Russia would be able to interfere with the situation rapidly and with the acceptable costs and risks and would strengthen its positions in the region.

As the specifics of the current historical moment consists in the accelerating transformation of the world order, the drawing of the basic scenarios is not enough. We have to single out a number of events that could abruptly change the external milieu and entail direct consequences for Central Asia. As compared to the previous years, in 2024 the following developments are of greater likelihood:

- beginning of the direct confrontation between the US and China (sparked, for instance, by the conflict over Taiwan) and the introduction of wide-scale Western sanctions against China;
- qualitative escalation of the conflict between Russia and the Western block (sparked, for instance, by the intensified strikes of the Kyiv authorities on the infrastructure in the Crimea and in the "deep" regions of Russia and by Russia's firm response, by provocations on the borders of Russia and (or) Belarus with the Baltic states and Poland and in the Baltic Sea). In this case the severance of Russia's diplomatic relations with the leading Western countries, the destruction of the remaining economic liaisons and the tightening of the sanction screws cannot be excluded;
- wide-scale war in the Middle East (e.g., a direct Israeli - Iranian collision with the US involvement).

The realization of the first variant would make it virtually impossible for the Central Asian countries to follow their preferred line of neutrality and multi-vector policies. The regional countries would be compelled to display solidarity with China and Russia that would include at least rendering active political support. Accordingly, the Russian – Chinese agreements and subsequent actions would become the factor defining the evolution of the entire regional subsystem.

The second variant would also mean that the Central Asian countries face a strategic choice. The extent of the practical solidarity with Russia that China would display in this case would apparently make a major impact on decisions taken in the Central Asian capitals. If China's solidarity remained at the level of 2022-2023, it might be assumed that Kyrgyzstan and Tajikistan would support Russia politically, Turkmenistan would distance itself from the situation while Kazakhstan and Uzbekistan would jointly declare a neutral position. However, in this case Astana's and Tashkent's neutrality would be seen by Russia as a "malevolent" neutrality, in fact, as a position of enmity.

If the third variant were to materialize, the Central Asian countries would have high chances to remain aloof from the conflict. The key Middle Eastern actors, Turkey and Saudi Arabia, would also try not to interfere with the conflict. However, its outcome would directly influence the positioning of Iran, the US, Turkey and Gulf monarchies in Central Asia and would change many of the external strategic milieu's parameters.

The economic consequences of any of the three variants or of their combination would reinforce the social and economic prerequisites of political destabilization in each of the region's countries.

According to our estimate, in 2024 the most likely **basic** scenario is the first one (65 %), followed by the third (20 %), the fourth (10 %) and the second (5 %).

The authors take the liberty to formulate the following recommendations for the government institutions which work out and implement the Russian policy in Central Asia.

In the foreign policy area:

- to hold consultations on the situation in Central Asia with the PRC leadership aimed at taking rapid coordinated measures in case of regional destabilization;
- to continue holding "Russia – Central Asia" summits and to complement the summit and foreign ministers' meetings with functional dialogues;
- to consider the possibility of mediation between the interested Central Asian states and the Afghan leadership aimed at resolving the Qosh Tepa Canal problem;
- to render cautious support to the development of relations between Iran and Central Asian states, giving particular consideration to the relations within the SCO and in connection with the Iranian Chairmanship in the Economic Cooperation Organization (ECO) in 2024;
- to consider the possibilities of Russia's joining the Organization of Turkic States (OTS) and the ECO as an observer;
- to consider the possibilities of concluding memoranda of cooperation between the EEC and the ECO Secretariat, the EEC and the OTS Secretariat, the CIS Executive Committee and the ECO Secretariat, the CIS Executive Committee and the OTS Secretariat.

In the military-political area:

- to expedite the adoption of the CSTO Targeted Program on Strengthening the Tajik-Afghan Border;
- to expand the cooperation in the area of training military cadre within the CSTO framework;
- to reinforce the Russian military base in Kyrgyzstan;
- to launch the joint Russian-Kyrgyz preparations for Kyrgyzstan's CSTO Chairmanship in 2025 and for the nomination of Kyrgyzstan's representative to the position of the CSTO Secretary General since January 1, 2026.

In the economic area:

- to expedite the establishment of the EAEU common markets for oil and oil products and for gas;
- to earmark resources for investments in the developing of industrial cooperation within the EAEU framework;
- to study the possibility of Uzbekistan's and (or) Tajikistan's joining the EAEU common electricity market without their entering the Union;
- to initiate the trilateral consultations of Russia, Kazakhstan and Kyrgyzstan on the problems of the transit of Kyrgyz goods through Kazakhstan and of their access to the Kazakhstani market;
- to consider the possibility of increasing Russian investments in Kyrgyzstan, Tajikistan and Uzbekistan.

In the humanitarian area:

- to work out and sign intergovernmental agreements on the opening and functioning of the branches of higher educational institutions with Kyrgyzstan and Tajikistan; to encourage Russian universities to open branches in Kyrgyzstan and Tajikistan;
- to increase significantly the quotas for the studies of students from the Centra Asian countries at Russian universities; to develop the set of measures aimed at facilitating the adaptation of Central Asian students to studies at Russian universities and life in Russia and to implement these measures in the universities with significant numbers of students from the Central Asian countries;
- to propose to Russian universities to launch wide-scale programs aimed at updating qualifications of university lecturers and school teachers from the Central Asian countries and to support these programs with federal funding;
- to encourage the leading Russian universities to launch, in cooperation with Central Asian universities, joint programs of studying languages, literatures and histories of Central Asian countries;
- to stimulate the opening of centers of Central Asian countries' languages and culture at Russian universities (if necessary, experts from the regional countries should be invited), with these activities widely covered in mass media and social networks;

- to organize the invitation of leading scholars from Central Asian countries, such as historians, ethologists, scholars of social sciences, whose positions on social, political and historical problems are not inimical to Russia, for guest lecturing at Russian universities;
- to expand the programs of building Russian-language schools in the Central Asian countries;
- to work out the mechanisms of grant support for the private Russian-language schools in Central Asia;
- to introduce the competitions for support of joint research carried out by Russian and Central Asian scholars on the basis of the Russian Science Foundation (RSF), with the special line of support to the joint research carried out by students and Ph.D. students from Russia and Central Asian countries (within the framework of the RSF, *Rossotrudnichestvo*, or the Presidential Grants Foundation);
- to explore the possibility of involving Uzbekistan and (or) Tajikistan in the EAEU projects in the area of science, technology and innovation and in the functioning of Eurasian Technology Platforms;
- to encourage the Russian Political Science Association, the Russian International Studies Association, the Russian Historical Society and (or) the leading Russian universities to initiate the establishment of associations of political scientists, IR scholars and historians of Russia and Central Asian countries.

CONCLUSION

In 2022-2023, Russia's active pursuit of policy in Central Asia, while remaining an undisputed foreign policy imperative, faced a considerably increased resistance of the external and internal milieu. Nevertheless, Central Asia remains the region of the world with the most favorable environment for the advancement of Russian political, economic and humanitarian interests.

An interested reader would undoubtedly notice that all the basic scenarios of the evolution of Russian policy in Central Asia that we have drawn rely on the assumption that Russian policy in the region continues to demonstrate a high level of activism. We do not take into consideration scenarios that assume Russia's "departure" from Central Asia and the curtailing of our country's links with the Central Asian states as we believe such scenarios to be incompatible with the fundamental interests of Russia as a Eurasian power.

It would certainly make sense to draw more detailed scenarios of the evolution of Russian regional policies that would focus on the policy areas analyzed in the report as well as on interactions with each of the Central Asian countries. However, we have chosen generalized, "integral" scenarios so that fragments of the general picture would not obfuscate its cohesiveness.

Our scenarios are short-term. For the early 2020s an exceptionally high dynamics of international political processes is typical, bringing into memory a famous thesis about "weeks where decades happen". We plan that, in the end of 2024, we will provide an updated version of the comprehensive analysis of the relations between Russia and the countries of Central Asia.

ABOUT THE AUTHORS

Editors: E.F. Troitskiy, S.M. Yun.
Authors of the chapters: A.G. Dankov (chapters 2, 6), A.M. Pogorelskaya (chapters 3, 4, 6), E.F. Troitskiy (chapters 1, 4, 6), D.M. Yadykin (chapter 5), S.M. Yun (chapters 4, 6).

Dankov Artyom Georgievich is Associate Professor at the Department of World Politics, National Research Tomsk State University.

Pogorelskaya Anastasiya Mikhailovna is Associate Professor at the Department of World Politics, National Research Tomsk State University.

Troitskiy Evgeny Florentievich is Professor at the Department of World Politics, National Research Tomsk State University.

Yadykin Dmitry Aleksandrovich is Deputy Chairman of the Committee on Foreign Economic Affairs, Department for International and Regional Affairs, Tomsk Region Administration.

Yun Sergey Mironovich is Head of the Department of World Politics, National Research Tomsk State University.