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INDUSTRIALIZATION AND GEOPOLITICAL BALANCING: CENTRAL ASIA BETWEEN NATIONAL STRATEGIES AND THE BELT AND ROAD INITIATIVE

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ABSTRACT

This article explores the dynamics of industrial development in Central Asia within the context of the Belt and Road Initiative (BRI), focusing on the interaction between national strategies of the Central Asian republics and China's economic and geopolitical ambitions. By examining key projects, policy frameworks, and foreign investment trends, the article sheds light on how Central Asian countries strive to balance their sovereign industrial agendas with external influences, particularly from China. It also discusses the role of Russia, the USA, the EU, Turkiye and multilateral development institutions in this geopolitical balancing act.

Key words: Central Asia, Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan, Turkmenistan, Belt and Road Initiative, industrialization, geopolitics, economic diplomacy, regional development, infrastructure, Eurasia.

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Индустриаландыру және геосаяси тенгерістік: Орталық Азия ұлттық стратегиялар мен «Белдеу және Жол» бастамасы арасында

Аңдатпа. Бұл мақала Орталық Азия республикаларының ұлттық стратегиялары мен Қытайдың экономикалық және геосаяси амбицияларының өзара әрекеттесуіне назар аудара отырып, «Белдеу және жол» бастамасы (BRI) аясында Орталық Азиядағы өнеркәсіптік даму динамикасын зерттейді. Негізгі жобаларды, саяси құрылымдарды және шетелдік инвестиция тенденцияларын қарастыра отырып, мақала Орталық Азия елдерінің егемен өнеркәсіптік күн тәртібін сыртқы әсерлермен, әсіресе Қытайдан қалай теңестіруге ұмтылатынын көрсетеді. Сондай-ақ Ресей, АҚШ, ЕО, Түркия және көпжақты даму институттарының осы геосаяси тепе-теңдік актіндегі рөлі талқыланады.
Түйін сөздер: Орталық Азия, Қазақстан, Өзбекстан, Қырғызстан, Тәжікстан, Түрікменстан, Белдеу және жол бастамасы, индустрияландыру, геосаясат, экономикалық дипломатия, аймақтық даму, инфрақұрылым, Еуразия.

Индустриализация и геополитический баланс: Центральная Азия между национальными стратегиями и инициативой «Пояс и Путь»

Аннотация. В данной статье рассматривается динамика промышленного развития Центральной Азии в контексте инициативы «Один пояс, один путь» (ОПОП), уделяя особое внимание взаимодействию национальных стратегий центральноазиатских республик с экономическими и геополитическими амбициями Китая. Анализируя ключевые проекты, политические рамки и тенденции иностранных инвестиций, статья проливает свет на то, как страны Центральной Азии стремятся сбалансировать свои суверенные промышленные программы с внешним влиянием, в частности со стороны Китая. Также обсуждается роль России, США, ЕС, Турции и многосторонних институтов развития в этом геополитическом балансировании.
Ключевые слова: Центральная Азия, Казахстан, Узбекистан, Кыргызстан, Таджикистан, Туркменистан, инициатива «Один пояс, один путь», индустриализация, геополитика, экономическая дипломатия, региональное развитие, инфраструктура, Евразия.

Introduction

The collapse of the Soviet Union in 1991 marked a new phase in China-Central Asia relations. China quickly recognized the independence of Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan, and Turkmenistan in 1992, establishing the foundation for bilateral diplomatic ties. The initial focus was on establishing embassies and consulates, and crucially, peacefully resolving inherited Soviet-era border disputes. China successfully negotiated and demarcated its borders with Kazakhstan, Kyrgyzstan, and Tajikistan, laying a vital foundation for trust and stability.

Central Asia, located at the crossroads of global trade and geopolitical competition, has since faced the dual challenge of economic transition and industrial revitalization. The Belt and Road Initiative (BRI), launched by China in 2013, has significantly intensified infrastructure development and trade connectivity in the region, with Kazakhstan playing a key role. Starting from the beginning it should be remembered that while the BRI offers substantial investment opportunities, it also raises concerns about economic dependence and strategic autonomy. Because, global supply chains may speed up industrialization but make it less resilient for smaller Asian economies that lack the bargaining power of a country like China (Devesh Kapur and Manik Suri (2014) [1].

Central Asia seeking for leveraging the opportunity for industrialization presented by the BRI to achieve regional economic prosperity. While previous regional economic integration efforts of Central Asian Union were largely unsuccessful, the BRI's infrastructure projects, including transportation networks, are fostering greater connectivity among Central Asian countries.The BRI is a major infrastructure and economic development project aimed at enhancing connectivity, expanding economic influence, and promoting regional integration [2].

The war in Ukraine and the resulting sanctions against Russia have led Central Asian countries to seek new trade routes to Europe and other areas, as the sanctions made it much harder to export goods through Russia, their traditional transit route. This search for alternative routes is driven by the need to diversify their economies as well.

The sanctions affecting the primary northern trade route, which the former Soviet Central Asian countries relied upon for trade with Europe, spurred those five nations to urgently seek alternative routes, such as the Trans-Caspian International Transport Route (TITR), opened in 2017.

It is obvious that Central Asia must seize the current window of opportunity for active industrialization — offered by China's Belt and Road Initiative — as a vital pathway to regional economic prosperity.

Methodology

The research methodology employed in this article includes an analysis of scientific literature, comparative studies of Central Asian countries's economic development in the frames of BRI, content analysis and a comparative analysis of the geopolitical and infrastructural projects. Using a qualitative approach, the author sought to establish the correlation between economic, industrial and geopolitical factors and their impact on the outcomes of Central Asian regional development.

Theoretical and empirical analysis is based on the study of official documents and national economic strategies. A historical-comparative approach is applied to analyze the dynamics of participation of countries in the region in international structures. Projects such as the Belt and Road Initiative, Organization of Turkic States, Eurasian Economic Union, and the "Middle Corridor" are studied as examples. A comparative analysis of cooperation formats allows us to identify their advantages and disadvantages.

Main part

Industrialization Strategies in Central Asia: a National Perspective

Since gaining independence, Central Asian countries have navigated their foreign relations, adopting a "multi-vector foreign policy" to balance historic ties with Russia and expanding partnerships with other global powers. They aim for balanced relations with Russia, China, the Western world (US, EU), and Turkey. This strategy involves maintaining economic and security links with Russia while exploring alternatives. They utilize hedging strategies or "hybrid allegiances" to seek a balance between economic opportunities offered by China and the security shield offered by the West, avoiding alignment with any single bloc [3]. They seek to maximize their goals regarding superpowers without compromising independence and want to avoid being excessively mortgaged to any great power.

Let us understand the objectives and development plans of Central Asian nations concerning the Belt and Road Initiative.

According to a CADGAT report, as of 2019, Kyrgyzstan was implementing 46 BRI projects, Tajikistan 44, Uzbekistan 43, and Kazakhstan 102, compared to 26 in Turkmenistan. Overall, there were 237 bilateral and 24 multilateral BRI projects in Central Asia, with 209 local and 52 regional projects [4].

The BRI priorities in Central Asia include: (a) rail and road connectivity, (b) energy connectivity, (c) trade promotion and industrial development (mineral/petroleum exploration, industry, finance/IT, and agriculture/food), and (d) people-to-people projects [5].

Kazakhstan

The energy transition's effects vary significantly by nation, strengthening technologically advanced states while forcing hydrocarbon exporters to adapt. Rather than simply reducing geopolitical tension, it reshapes it, presenting new opportunities and challenges for global collaboration (Agajanova (2025) [6].

Kazakhstan aims to double its national economy to $450 billion within five years, prioritizing citizen well-being. This goal is to be achieved through industrial projects, a new tax code, and revised fiscal policies [7]. According the the World Bank the potential economic impact of the BRI on Kazakhstan's GDP is substantial. Estimates suggest that infrastructure improvements alone could contribute around 6.5% to Kazakh GDP, while advancements in trade facilitation and tariff reductions along the corridors are expected to add a further 15% [8].

Kazakhstan's "Nurly Zhol" program, focusing on infrastructure and industrial modernization, aligns with the BRI's logistics objectives. Its Strategy 2050 seeks economic diversification away from raw materials[8]. Kazakhstan plans to repair over 27,000 km of local roads by 2025 along with other 112 projects[9]. China's BRI complements Kazakhstan's Nurly Zhol by developing infrastructure and boosting connectivity across Eurasia. This synergy positions Kazakhstan as a key transit corridor, enabling economic diversification, investment attraction, and a stronger role in regional trade [10].

Kazakhstan's participation in the BRI has enhanced its geopolitical status and reduced its dependence on Russia. The synergy between the BRI and Kazakhstan's "Nurly Zhol" program creates opportunities for strengthening the strategic partnership between China and Kazakhstan.

The war between Russia and Ukraine has created a "window of opportunity" for Kazakhstan, increasing the transit potential of routes through the country, particularly the TMTM. The decline in transit through Russia has driven the need for alternative routes [11]. China has become Kazakhstan's top trading partner, surpassing Russia. Furthermore China and Kazakhstan have established a special fund for cooperation in production capacity and utilize financial platforms like the Asian Infrastructure Investment Bank has a total planned capital expenditure of US$26 billion and the Silk Road Fund has allocated US$2 billion for equity to support BRI in potential projects. Over the past 25 years, China has committed approximately US$30 billion in loans and equity investment to Kazakhstan [12]. In 2016, Kazakhstan and China signed a cooperation plan to align "Nurly Zhol" with the "Silk Road Economic Belt", outlining joint projects in Kazakhstan within the framework of which a list of 51 joint projects in Kazakhstan was formed for a total of $24–26 billion, later, the list expanded to 55 enterprises [13]. In 2023, the trade volume between the two countries reached $41 billion [14].

However there is a risk that Kazakhstan could become overly dependent on exporting raw materials to China. Chinese trade with Central Asia predominantly involves importing energy and natural resources while exporting processed goods.

By 2050, Kazakhstan aims to become a key Eurasian power, with China as a modern global power [15]. Thus, Kazakhstan is the leading power in Central Asia in terms of transit potential and the richest. It has the ambitious goals that can be achieved in the frames of BRI project. And the economic achievements will strengthen its middle-power status.

Uzbekistan

Uzbekistan's post-independence economic transformation involved gradual reforms, which mitigated the impact of the Soviet Union's collapse and fostered economic growth. Initially reliant on raw material exports, Uzbekistan strategically pursued economic independence and self-sufficiency, prioritizing industrial policy.

Uzbekistan implemented a multifaceted industrialization policy to reduce dependence on cotton, achieve food and energy self-sufficiency, and increase industry's share of GDP. The government used various instruments, including incentives, state orders, selective FDI, and trade measures.

Uzbekistan's industrial development shows encouraging trends. Uzbekistan has shown significant industrial growth, with the World Bank (2024) reporting an increase in value-added industry from $11 billion in 2010 to $25 billion in 2022. Additionally, industrial employment rose from 20% to 24% of total employment during 2000-2022 [16].

Under President Shavkat Mirziyoyev, Uzbekistan has pursued economic reforms. The new Uzbekistan Development Strategy 2022–2026 aims to pursue 100 defined goals and 398 actions, one of which is aimed at increasing the country's GDP per capita from the current USD 1,983 to USD 4,000 by the end of 2026, by mobilizing available resources and opportunities. This goal will be achieved by stimulating Uzbekistan's private sector, attracting foreign direct investment, and establishing a cluster system for key industries such as textiles, electrical engineering, automotive, building materials, chemicals, petrochemicals, agricultural machinery, and energy, all in support of the national development strategy. To boost regional economic potential, the country established free trade zones and provided foreign investors with subsidies and rebates for modernization projects. Additionally, specialized small industrial zones were developed, complete with the necessary infrastructure for efficient operation [17]. Uzbekistan is the second largest economy in Central Asia, and the government aims to achieve uppermiddle income status by 2030 [18].

Uzbekistan's 2030 Development Strategy supports industrial clusters, technology parks, and energy diversification, with goals to significantly increase GDP and per capita income. Uzbekistan also aims to enhance its integration into global transport and logistics networks.

A cornerstone of Uzbekistan's 2030 Strategy involves a dramatic increase in investor protections, safeguarding rights and enhancing the Tashkent International Arbitration Centre's dispute mechanisms. This is complemented by a strategic expansion of its visa-free policy, now covering 93 countries, which actively draws global talent and investment [19].

Thus, under President Shavkat Mirziyoyev's leadership, Uzbekistan anticipates a promising future, driven by strategic national industrialization plans aligned with the Belt and Road Initiative (BRI).

Kyrgyzstan

Kyrgyzstan pursued rapid market-based reforms, joining the WTO early. Despite this, it experienced a severe economic depression in the early post-Soviet period. The Kyrgyz government has sought to foster growth through tax incentives and infrastructure development, benefiting sectors like gold mining and the garment industry. The garment industry is a major part of Kyrgyzstan's manufacturing sector, benefiting from low wages but facing low productivity. The government prioritizes this sector due to its economic contribution [20].

The BRI is important for Kyrgyzstan, with China as its largest exporter and investor. The BRI is improving Kyrgyzstan's infrastructure and energy security [21].

The largest projects on which Kyrgyz side has major expectations within the BRI are the China-Kyrgyzstan-Uzbekistan railways and the Turkmenistan-China gas pipeline, both crossing the Kyrgyz territory.

China has supported social development in Kyrgyzstan through various projects. In addition to the BRI cooperation program, both sides formalized agreements on trade, the digital economy, artificial intelligence (AI), social security, energy, and infrastructure. Other agreements include Chinese assistance for Kyrgyzstan's judicial information system, medical equipment for hospitals, and economic reforms [22].

However, Kyrgyzstan is among the nations considered potentially vulnerable to falling into a "debt trap" due to Chinese loans. Some experts note that a lack of trust among the people of Kyrgyzstan is the only factor preventing the thorough promotion of the Belt and Road project [23].

Tajikistan

According to Tajikistan's National Development Strategy until 2030 outlines goals for energy security, transit development, food security, and employment expansion. It emphasizes structural reforms, investment attraction, and industry growth in sectors like energy, mining, light and food industries, metallurgy, and building materials. The strategy aims to increase industrial production and the share of industry and private investment in GDP, emphasizing the processing of local raw materials and attracting foreign direct investment [24].

Industrial development in Tajikistan is influenced by various factors and partnerships, with China's BRI playing a role primarily in the context of infrastructure and connectivity.

BRI transport infrastructure in Tajikistan mainly facilitates the movement of goods from western China towards markets in Iran, the Caucasus, and the Middle East, with limited direct benefit to Tajikistan's domestic industry. Tajikistan's mountainous terrain means that many BRI trade routes bypass the country [25].

China is a significant investor in Tajikistan's industrial sector, particularly in mining and processing. China involved in Tajikistan's modernization of the TALCO aluminum plant by China Machinery Engineering Corp. (CMEC) [26]. Chinese companies involved in gold mining and processing. The joint venture Bilol Suyulin, a cement factory in Konibodom, Sughd Province, with an annual capacity of 200,000 tonnes. Most cement plants in Tajikistan have been built with Chinese assistance [27]. Expected increase in Chinese investment in aluminum, antimony, and gold production continued.

In 2022, Tajikistan received $257 million in Chinese investment, of which $192 million was direct investment, constituting 74% of the country's total foreign direct investment for that year.[28]

The BRI-induced fall in shipment time and increased FDI are estimated to raise Tajikistan's GDP by 5 percent from transport infrastructure improvements alone, potentially by 32 percent if accompanied by complementary reforms that halve border crossing delays [29].

Tajikistan is also pursuing other international partnerships for industrial and economic development, including a joint industrial park with Russia by 2030 [30] and cooperation with the European Union [31].

Turkmenistan

Turkmenistan has 12 projects within the "Trade and industrial development" sector under China's BRI and bilateral projects [32]. Turkmenistan's development strategies, synchronized with China's BRI, aim to transform the country from primarily agricultural to industrial, attract investment, and develop free trade zones [33].

China, through the BRI, seeks to expand transportation and logistics infrastructure, trade links, and industrial promotion in Turkmenistan. Turkmenistan views China as its most important partner and aligns its national development plans with BRI cooperation [34].

To ensure comprehensive development, the China-Turkmenistan Cooperation Committee plays a crucial coordinating role in aligning the Belt and Road Initiative with Turkmenistan's national strategy for reviving the Silk Road. This involves intensifying efforts to effectively execute the 2021-2025 five-year cooperation plan between the two governments, thereby promoting parallel advancements in diverse areas of collaboration[35].

There are several specific areas of industrial development linked to BRI cooperation in Turkmenistan. Gas cooperation is a cornerstone of the China-Turkmenistan relationship, with BRI assistance speeding up the development of the Galkynysh field. Expansion and deepening of investment in chemical Industry through BRI cooperation[36]. Besides there are also value-added processing through the development of free trade and economic zones along transport corridors.

Since the collapse of the Soviet Union, Central Asia has been navigating a complex path of economic transition and industrial revitalization, with China and its Belt and Road Initiative (BRI) playing an increasingly significant role. The early post-Soviet period saw the establishment of diplomatic ties and the resolution of border disputes, laying the groundwork for future cooperation.

The BRI has since become a major driver of infrastructure development and trade connectivity across the region, offering opportunities for economic growth but also raising concerns about potential over-reliance on China. Central Asian nations are actively pursuing industrialization strategies, with varying degrees of BRI involvement, to diversify their economies, enhance their geopolitical standing, and secure regional economic prosperity.

The war in Ukraine has further accelerated the need for new trade routes, highlighting the strategic importance of initiatives like the TITR. While each Central Asian country has its own unique approach, the common thread is a desire to leverage the opportunities presented by the BRI and other international partnerships to achieve sustainable industrial development and a more prominent role in the global economy.

Geopolitical Implications and Strategic Balancing

Central Asia, long perceived as the crossroads of empires and civilizations, has reemerged as a strategic pivot in the 21st century. Situated between major powers — China to the east, Russia to the north, and proximate to the Middle East and South Asia — this region is experiencing renewed interest due to its vast natural resources, transport potential, and political significance. Infrastructure development, particularly in transportation, energy, and digital connectivity, has become a central domain through which geopolitical rivalries and partnerships manifest.

Industrialization also spurs technological advancements that affect international relations. Innovations in transportation, communication, and information technology can shift the balance of power and influence diplomatic relations. Countries at the forefront of technological advancements can leverage this to gain strategic advantages in various geopolitical contexts [37].

The geopolitical implications and strategic balancing acts undertaken by Central Asian states in managing infrastructure projects, while navigating the competing interests of China, Russia, the USA, the European Union (EU), and Türkiye.

China's Infrastructure Ambitions: The Belt and Road Initiative (BRI)

Industrialization can lead to the emergence of new powers, altering traditional geopolitical hierarchies. The rise of industrialized nations like China has reshaped global power dynamics, challenging the dominance of previously established powers and leading to a more multipolar world [38].

China's Belt and Road Initiative (BRI) has had a transformative effect on the infrastructure landscape of Central Asia. Through significant investments in roads, railways, pipelines, and logistics hubs, China has positioned itself as a principal economic partner. The China–Kyrgyzstan–Uzbekistan railway project, Khorgos dry port in Kazakhstan, and various highways and energy pipelines demonstrate Beijing's commitment. These projects enhance China's westward connectivity, reducing its dependence on maritime routes and increasing its geopolitical leverage. China has become and will certainly remain the largest investor in Central Asia, capable of mobilizing huge investments beyond what Western countries and Russia can offer [39]. China's Belt and Road Initiative (BRI) is a key driver of its engagement, seen as a holistic strategy with political, logistical, and economic interests intertwined, aiming to increase China's capacity to project influence. BRI aims to spur growth in China's hinterland, address excess capacity, and find alternative markets for state-owned companies [40]. China is seen as offering the most promising proposal for regional integration compared to other projects. Through BRI, China expands its geopolitical influence and seeks resource security. China's increasing influence is reinforced by major infrastructure projects and investment abroad. While appreciative of investments, countries like Kazakhstan and Uzbekistan seek to avoid overdependence, occasionally renegotiating terms or diversifying partners.

Russia's Regional Clout and Infrastructure Legacy

Russia retains considerable influence in Central Asia due to historic, linguistic, economic, and security ties especially for Kazakhstan and Kyrgyzstan. . The region's infrastructure systems — railways, energy grids — remain deeply interconnected with Russian networks. Participation in the Eurasian Economic Union (EAEU), joint energy projects, and digital infrastructure integration (e.g., Russia-led data centers). The EAEU promotes customs union integration, often overlapping or competing with Chinese BRI infrastructure strategies. Moscow seeks to preserve its sphere of influence through the CSTO, counterbalance China's rising dominance, and prevent Western encroachment. Moscow needs Central Asia now more than ever as a conduit for sanctions evasion, to re-orient its trade and to demonstrate that it still has allies [41]. Russia's economic constraints and the Ukraine conflict have limited its investment capabilities, causing Central Asian states to recalibrate their dependency and it strengthened intra-regional cooperation, fostering regional autonomy. The governments of Central Asian nations prioritize a broad network of relationships conducting the multi-vector diplomacy over participation in trade blocs created by Moscow. Central Asia has historically relied on Russia for economic and security partnerships. Russia maintains significant influence through institutions like the CIS, CSTO, and the Eurasian Economic Union (EAEU), serving as platforms for regional security and economic collaboration [42]. The EAEU is described as Russia's regional integration project, driven more by geopolitics than economics, with member states hesitant to cede national sovereignty. Despite this, Russia is noted as one of BRI's most enthusiastic partners, pledging to link the EAEU with BRI. However, experts are skeptical of this partnership's economic asymmetry, given Russia's economy is much smaller than China's [43]. Russia's two-century-long dominance is described as receding and likely to shrink. Russia continues to dominate the region's information space. Moscow has explicitly threatened Kazakhstan and issued warnings to others following the war in Ukraine. Turkmenistan and Tajikistan continue to seek accommodation with Russia.

The USA's Selective Engagement: Soft Infrastructure Focus

While geographically distant, the USA remains an active geopolitical player in Central Asia through diplomatic, economic, and security channels. Washington has shown interest in supporting infrastructure that promotes sovereignty, transparency, and independence from authoritarian influence. USAID's infrastructure capacity-building projects, CASA-1000 electricity transmission project, and support for digital infrastructure resilience [44]. The US has engaged with the region through initiatives like the C5+1 platform, holding a summit in September 2023 [45]. The United States aims to counter China's Belt and Road Initiative (BRI) by promoting its own strategic interests in the Eurasian Convergence Zone. This includes fostering military, political and economic ties with regional powers like India and Japan while advocating for a multilateral approach to avoid unilateralism. The US seeks to maintain its influence in the region and prevent the establishment of a new geopolitical Shatter-belt that could arise from the increased competition among Eurasian powers[46]. The USA's strategic Goal is to curb the influence of China and Russia, enhance regional energy export options (e.g., toward South Asia), and promote good governance. However the absence of massive investment compared to BRI; U.S. projects often emphasize standards and institutions over hardware. Moreover the USA is able to conduct the overseas operations as the Colored Revolutions in the Middle East known as Arab Spring and in the post-Soviet space. Besides the Biden's administration left great mass of various weapons in Afghanistan making the Taliban's army one of the mightiest in the region. There is a risk of starting insurgencies by the Afghan militants under the aegis of the USA into the territory of Central Asian countries to undermine the BRI project.

The US closed its last base in Central Asia in 2014. Some argue that America has fallen far behind in the communication sphere and that giving China and Russia a free hand risks creating a situation where Central Asia falls under exclusive Sino-Russian control, impacting US interests. Competition between the US and China is intensifying, although some argue it's not a "new cold war" due to a lack of clear ideological camps. Providing alternatives to BRI is suggested as a way for the US to deal with China's influence [47].

Recognizing the strategic importance of heavy industry, the United States has sought to counter China's influence. The U.S. administration views China as a major economic and geopolitical competitor and has actively sought to counter the BRI.

EU's Role: Sustainability and Connectivity

The EU, recognizing Central Asia's geostrategic value, has rolled out its Global Gateway strategy, aiming to offer an alternative to the BRI through sustainable, transparent, and green infrastructure. EU-funded transport corridors, green energy transitions, and digital economy initiatives in Kazakhstan and Uzbekistan. Its strategic purpose is to Counterbalance China, promote climate-resilient development, and foster regional connectivity with Europe via the Trans-Caspian International Transport Route (TITR). The EU primarily projects its influence through setting new norms. The EU also promotes job creation through programmes that catalyse the growth of young small and medium-sized enterprises [48]. In January of this year, the European Union committed 10 billion euros (approximately US$10.75 billion) to support logistics and transportation initiatives in Kazakhstan and other Central Asian countries. This initial funding is set to be complemented by a further 18.5 billion euros (around US$19.9 billion), aimed at upgrading highways, rail networks, and the seaports of Aktau and Kuryk to facilitate smooth transit of goods from China to Europe [49]. National security concerns have become a key motivation behind many EU industrial measures, with significant investments aimed at strengthening domestic industrial capabilities to prepare for potential geopolitical conflicts or challenges [50].

The rise of protectionism and economic nationalism, the main preacher of which is the United States - is becoming increasingly clear. Under these conditions, political and business circles of the European Union are beginning to fear that the U.S., ignoring international treaties and thus destabilizing the situation in the world, can impose conditions disadvantageous for Brussels on the European Union [51].

Thus the EU is extremely interested in fostering the infrastructure projects. It is worth mentioning that the EU is perceived by the Central Asian countries as a neutral and technologically advanced partner, though bureaucratic processes can slow implementation. The EU has been involved in investments aimed at freeing countries from the "Russian yoke" and expanding democratic spaces [52]. Like the US, the EU's ability to expand its sphere of influence could be crippled by potential Sino-Russian control.

Türkiye's Cultural Leverage and Regional Integration

Türkiye's involvement in Central Asia is grounded in linguistic, cultural, and historical ties, reinforced through the Organization of Turkic States (OTS).

As the international order's center of power moves from West to East, Türkiye finds itself at a crucial geostrategic nexus. Its unique geographical placement is believed to be key to unlocking new alignments and influencing evolving power balances across the region. Consequently, Türkiye, along with the Organization of Turkic States (OTS), is deemed highly significant for the Belt and Road Initiative's success, functioning as a primary conduit connecting Asia to Europe [53].

OTS's infrastructure cooperation has grown, especially in logistics, transport corridors, and energy. Contribution to the Middle Corridor, the Baku-Tbilisi-Kars railway, and logistics hubs to connect Türkiye with Central Asia via the Caspian Sea[54]. Turkish Geopolitical Intent is establish itself as a Eurasian connector, reduce Russian and Iranian transit dependency, and promote Turkic solidarity. Central Asian states generally welcome Türkiye's presence, though they balance it carefully to avoid upsetting other great powers. It should be noted that among the mentioned before projects the most promising are the Organization of Turkic States and Chinese "One Belt One Road" projects, as they have the potential to connect through the territories of Turkey, Azerbaijan and Kazakhstan as the main route. And there is another transport route that lies on the territories of Kyrgyzstan and Uzbekistan as well. The Zangezur corridor will sew the Turkic space and allow to reduce the time of delivery and accelerate the transit of goods from China to Europe and back [55]. OTS has the most effective political, cultural and linguistic platform for the integration of the Central states. The "Belt and Road" project provides the largest financial base and coincides with the infrastructure development programs of the countries of the region themselves.

Discussions

Central Asian countries adopt a "multi-vector" foreign policy, seeking to maintain strategic autonomy by engaging multiple powers simultaneously. Kazakhstan emphasizes balance among China, Russia, the West, and Türkiye. It is a key promoter of the Middle Corridor and a cautious partner in BRI. Since 2016, Uzbekistan has invited infrastructure cooperation from all actors, aligning projects with its economic liberalization strategy. Kyrgyzstan and Tajikistan are economically reliant on China and Russia, yet increasingly seek Western and Turkish investment for diversification. Turkmenistan maintains neutrality but shows growing openness to diversify infrastructure partners for its gas exports. Central Asian states made several attempts to integrate into a regional entity, however it was futile. There is a window of opportunity for the Cenrtral Asia opened with the engagement of Russia into the war against Ukraine and its economic and geopolitical weakening and strengthening of China and Turkiye to get united into a real union just like the EU.

Conclusion

Infrastructure development in Central Asia is far more than an economic exercise — it is a geopolitical chessboard where global powers compete and cooperate. Central Asian states, aware of their strategic value, have mastered the art of balancing competing interests to maximize benefits while preserving sovereignty.

As global competition intensifies, the region's ability to maintain this delicate equilibrium will define its future stability, prosperity, and geopolitical orientation. The infrastructure domain will remain the crucible in which the new regional order is shaped.

Central Asia's post-Soviet development is defined by the pursuit of economic revitalization and industrialization within a complex geopolitical landscape. The Belt and Road Initiative has emerged as a crucial factor, offering both opportunities and challenges to the region.

Kazakhstan has strategically aligned its "Nurly Zhol" program with the BRI, positioning itself as a key transit hub and aiming to diversify its economy. Uzbekistan has adopted a gradual reform approach, focusing on industrial policies to achieve self-sufficiency and reduce reliance on raw material exports. Kyrgyzstan, while embracing market reforms early on, is leveraging the BRI to improve its infrastructure, though concerns about debt dependence exist. Tajikistan, while participating in the BRI, sees its primary benefit in facilitating transit trade, with Chinese investment focused on its mining sector. Turkmenistan aligns its national development strategies with the BRI, emphasizing industrial transformation, particularly in energy and chemical sectors.

The BRI has undeniably reshaped Central Asia, fostering greater connectivity and attracting substantial Chinese investment. However, this has also led to concerns about economic dependence and the need to balance national strategies with the broader objectives of the BRI. The challenge for Central Asian states lies in maximizing the benefits of the BRI while safeguarding their economic and strategic autonomy. Furthermore, as the global geopolitical landscape evolves, with the U.S. and other actors seeking to counterbalance China's influence, Central Asia must navigate these competing interests to ensure its long-term stability and prosperity. The future of Central Asia hinges on its ability to leverage its strategic location and resources, implement effective national industrialization strategies, and engage with initiatives like the BRI in a way that promotes sustainable and balanced development.

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