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EURASIA PROGRAM

# RUSSIA AND CHINA IN CENTRAL ASIA

## Potential For Direct Competition

MAXMILIAN HESS





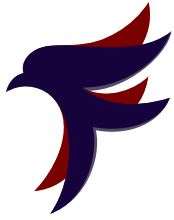
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## **Potential For Direct Competition**

**Maximilian Hess**

## About the Author

Maximilian Hess is a Central Asia Fellow in the Eurasia Program at the Foreign Policy Research Institute and the founder of the London-based political risk firm Enmetena Advisory. He is also the author of *Economic War: Ukraine and the Global Conflict between Russia and the West* (Hurst, 2023). His research focuses on the relationship between trade, debt, international relations, and foreign policy, as well the overlap between political and economic networks.

## Eurasia Program

The Eurasia Program at the Foreign Policy Research Institute was founded in 2015 with the aim of examining the political, security, economic, and social trends shaping Europe and Eurasia. Our research agenda covers the increasingly tense competition roiling the region from several angles. It has a multi-year focus on the Baltic Sea, the Black Sea, and Central Asia, emphasizing how geography, economics, ideology, and history continue to shape politics and security in these regions. The program also publishes analyses of Russian foreign policy, including Russia's role in Europe, Asia, Africa, and the Middle East. The Russia Political Economy Project, along with the Bear Market Brief, analyzes the linkages between Russia's economy, society, and its political system. The Eurasia Program's thematic initiatives also include the Democracy at Risk rubric, which examines the trends of democratization and authoritarian pushback in the region.



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Monument of Independence in Ashgabat, Turkmenistan. (Adobe Stock)


# Executive Summary




China is now undisputedly the leading economic partner for the Central Asia region, with trade and investment continuing to increase despite Beijing's economic slowdown.




Russia is still the dominant political partner for the region, but its influence and ability to strong-arm Central Asian states has been significantly dented by the impact of Vladimir Putin's full-scale invasion of Ukraine.



Central Asian states are now able to tacitly criticize Putin's actions without significant cost and some have taken advantage of the negative impacts of Russia's international isolation and sanctions to strike beneficial deals, in particular Uzbekistan and Kazakhstan.



Moscow remains content in its position, knowing that the lack of democracy in the region and dominance of elite networks in business and politics mean that regional states are still willing to turn to Moscow for political support, as witnessed in the Kyrgyz Republic in particular since President Japarov came to power in 2020.



Tensions between Beijing and Russia have failed to emerge, at least publicly, although if the current trends continue the potential for direct competition may increase.



# Kazakhstan

Russia's intervention under the auspices of the Collective Security Treaty Organization (CSTO) in Kazakhstan in January 2022 arguably marked the peak of its post-Soviet influence in Central Asia. The Kremlin's action came in response to a request from Kazakh President Kassym-Jomart Tokayev who had ordered police fire on protesters after a protest movement rapidly spiraled from opposition to rising fuel prices and spread from the energy heartlands in Kazakhstan's west to its major population centers in the south and east. Tokayev has subsequently blamed relatives of Kazakhstan's long-dominant political figure Nursultan Nazarbayev, who had handpicked Tokayev as his successor in 2019, and ex-intelligence chief and prime minister Karim Massimov, alleging that they fomented violent unrest.<sup>1</sup> Although no independent investigation has been carried out and many questions remain over the precise course of its event, Vladimir Putin demonstrated to the region's leaders, none of whom govern democracies, that he would provide a regime security net.<sup>2</sup>

The lack of any significant opposition to the move even from the West—despite Washington conveying that it was aware that Russia would imminently launch a full-scale invasion of Ukraine and Europe expressing its willingness to burden significant costs in support of Kyiv—made clear to regional leaders they would not be a Western priority.<sup>3</sup> The wounds from the final US withdrawal from Afghanistan

and the subsequent Taliban takeover the previous summer were still fresh. At the same time, China's support for Moscow's intervention, with Xi Jinping—even using Putin's favored “color revolution” term to describe Kazakhstan's anti-regime protests—also signaled the Sino-Russian entente cordiale was stronger than ever.<sup>4</sup> Beijing's trade with the region moved from a strong and steady trot up within Central Asia's rankings ever since the Soviet collapse, and more recently escalated into an outright gallop that has made it the region's leading economic partner. Despite this trade boom and the centrality of the Belt and Road program—initially launched in Kazakhstan—to Beijing's foreign policy, China elicited no signs of concern that its political relations with Russia could be anything of concern in Central Asia.<sup>5</sup> Nor was Beijing concerned that Putin's intervention would lead Moscow to seek to pull Kazakhstan away from China.

**Beijing's trade with the region moved from a strong and steady trot up within Central Asia's rankings ever since the Soviet collapse, and more recently escalated into an outright gallop that has made it the region's leading economic partner.**





Russian paratroopers from the CSTO peacekeeping contingent performing tasks in the Republic of Kazakhstan. (Odkb-Csto.org)

Although Russia's intervention in Kazakhstan was swift, with its troops withdrawn within two weeks of arrival, the next intervention that Putin launched just over one month later in Ukraine has proven far more lasting and devastating.<sup>6</sup> And it has radically shifted Russia's position downward in Kazakhstan—and much of the rest of the region. Relations with Beijing have been maintained, but significant doubt remains whether relations will be as durable as they appeared in 2022.

The reason for this shift is largely predicated on Russia's weakening position—China's on the other hand remains robust. While there is simultaneously evidence that the steadily rising anti-China sentiment among the broader population of all Central Asian countries has spread to

regional elites, Beijing offers a massive trade opportunity and source for foreign investments on Central Asia's doorstep, which is geographically and geopolitically difficult to access without going through Russia or China.<sup>7</sup> Despite the ongoing economic slowdown in China, its position in Central Asia its importance to Central Asian economies continues to improve . Beijing's trade with the region grew 27% in 2023 according to Chinese statistics and only slightly less according to those of Central Asian countries.<sup>8</sup> In May 2023, China also launched a new forum for meetings with the region, the China-Central Asia summit, though the center of power in the relationship is evident in the fact that Xi brought the region's presidents to the central city of Xi'an in Shaanxi Province rather than host it in Xinjiang. Public displays of anti-China policy are clamped down on by all Central

Asian states—including by President of the Kyrgyz Republic, Sadyr Japarov, who criticized the economic imbalance between the region and China before, and during, his 2020 power grab, but who now vows to uphold his country's debts to China.<sup>9</sup>

The solidity of Beijing's position in Central Asia is predicated on an understanding of the pressure points in the development of Russia and China's relationship in the region going forward and of how Russia's position in Central Asia has been negatively impacted by Putin's war on Ukraine.

Nowhere is the shift as stark as in Kazakhstan. Tokayev's dependency on Putin to bail him out—regardless of whether one sees the January events as an averted uprising, “color revolution,” or attempted coup—was clearly no longer sustainable after he and the rest of the world awakened to a new reality following the full-scale invasion of Ukraine. It did not take long for Astana to begin signaling that it was not on board with Russia's moves and that it would take steps to shield itself from the impact of Western sanctions, with Kazakh banks rapidly cutting their correspondent banking services to Russia.

Four months after Putin launched his all-out war and five after he potentially bailed out Tokayev's government, Tokayev—on stage in St. Petersburg alongside Putin—tacitly criticized Putin's war against Ukraine by labeling Russia's decade-old proxy statelets in Ukraine as “quasi-state territories” that he said Kazakhstan would not recognize due to their incompatibility with international law, adding in the

Russian-backed breakaway states in Georgia as well as Kosovo for good measure.<sup>10</sup> Kazakh media reported that Tokayev refused to accept a state medal that Putin wanted to honor him with around the timing of the summit (though the Kremlin denied the reports).<sup>11</sup>

Other Central Asian leaders have even issued more sharply pointed criticisms of Vladimir Putin and his regime's agenda in the last two years, none more so than Tajikistan's strongman President Emomali Rahmon. When Putin came to Astana for the Commonwealth of Independent States (CIS) summit in October 2022, Rahmon demanded that Russia treat the region with the same “respect” that it showed to Russia and touched on Putin's bugbear of describing the Soviet collapse as “the greatest geopolitical catastrophe of the [20th] century” by warning that “then, like now... not enough attention was paid to the small republics.”<sup>12</sup> At the same summit, Tokayev pointedly held bilateral talks with Rahmon and all other Central Asian heads of state, but not Putin.<sup>13</sup>

**The solidity of Beijing's position in Central Asia is predicated on an understanding of the pressure points in the development of Russia and China's relationship and how the region has been negatively impacted by Putin's war on Ukraine.**



Russian President Vladimir Putin and President of Kazakhstan Kassym-Jomart Tokayev before the start of an informal meeting of the heads of state of the Commonwealth of Independent States, December 2022. (Alexey Danichev, RIA Novosti, kremlin.ru)

There have been some notable economic shifts in the Russian-Kazakh bilateral relationship as well. In response to Tokayev's initial criticism and amid Putin's weaponization of hydrocarbon supplies throughout 2022 in a riposte to the international sanctions imposed on his regime, the Kremlin turned to an old tool to influence Kazakhstan: it began to invent reasons to shutter the Caspian Pipeline Consortium (CPC) to threaten Astana's economy that remains dependent on the route via Russia for more than 80% of its oil exports.<sup>14</sup> But as Western sanctions continued to be tweaked and the Russian energy weapon was blunted toward the end of 2022 and into 2023, Russia was forced to revisit the relationship. Its Druzhba pipeline carrying oil to Poland and Germany could no

longer carry Russian oil to these markets and instead began to deliver Kazakh oil.<sup>15</sup> There have been no spurious closures of the CPC since. The geopolitical imbalance between the two oil producers has, at least concerning their pipeline networks, been reversed.

The shift could also be found in the population, with Kazakhstan emerging as a hub for Russians fleeing the mass conscription that Putin ordered in September 2022. Even more shocking was that President Tokayev openly welcomed these refugees, largely young Russian men.<sup>16</sup> The country has also welcomed dozens of Western firms that left Russia in the months following the war, offering a new regional hub to base themselves in without the sanctions and





Shakhpakhty Project, Uzbekistan (Gazprom).

reputational risks—as well as the potential for nationalization by the Putin regime—associated with remaining in Russia.<sup>17</sup> At the same time, its proximity to Russia and membership in the Eurasian Economic Union means that Kazakhstan has become an important transit destination for Kremlin-linked actors to try and source dual-use goods and other material for Russia’s war effort, though this cannot be described purely as a Kazakh failing given that responsibility ultimately lies with exporters in third countries. Although Kazakhstan has not brought sanctions on Russia within its law books, it has repeatedly signaled that it will enforce Western restrictions where it can and has shuttered operations—in response to more recent sanctions against Russian payment systems—in Russia even when these technologies were already fairly established in the country.

Nevertheless, some have argued Russia’s economic leverage has remained strong and even accelerated since the full-scale invasion of Ukraine.<sup>18</sup> Russia has indeed worryingly increased its strategic position in Kazakhstan’s uranium sector—one that could prove geopolitically significant given its recent rising price and role in renewable power production—of which Russia and Kazakhstan respectively account for 5% and 43% of production globally.<sup>19</sup> Notably, Kazakh elites, except a handful of individuals around the Nazarbayev family, have largely remained unchanged since the January events.<sup>20</sup> Given the historical importance of elite relationships in maintaining Russian influence in the region, these vectors could prove important in reestablishing Russian dominance in the relationship.<sup>21</sup>



# Uzbekistan

But the shift in economic power between Russia and Central Asian states even amid the relative geopolitical stability that the region's nondemocratic elites can present is also on clear display in Uzbekistan.

Tashkent has historically not been as close to Russia as Kyrgyzstan, Tajikistan, or Kazakhstan given the tensions that emerged under former dictator Islam Karimov, who governed the country from independence until his death in 2016. His successor, President Shavkat Mirziyoyev, has normalized relations with Russia. However, this has been part of a broader process of opening the Uzbek economy and adapting a foreign policy seemingly based on the 'multi-vector' approach that Kazakhstan has long publicly pursued which continues under Tokayev despite the recent shifts away from its original practitioner, ex-president Nazarbayev. Uzbekistan did join the Eurasian Economic Union as an observer member in 2020 under substantial pressure from the Kremlin, but it has since dragged its feet on moving any closer to the ineffectual bloc.<sup>22</sup>

Another clear signal of the reversing relationship is the gas arbitrage that Uzbekistan seems to be engaging in with Russia. In June 2023, Tashkent agreed to buy 2.8 billion cubic meters of Russian natural gas annually from Russia's Gazprom.<sup>23</sup> In March 2024, Kazakh officials stated that they expected the amount of Russian gas flowing to

Uzbekistan to reach 3.8 billion cubic meters in 2024, and Russian state media reported that Tashkent could seek to raise it to as much as 11 billion cubic meters per annum by 2026.<sup>24</sup> While it may seem counterintuitive to argue that new Russian gas sale agreements are representative of its declining dominance over the region given how Russia has used gas supplies to influence Ukrainian and European politics for decades, the context is rather different given that Tashkent is a gas producer and exporter. Uzbekistan had faced gas shortages before agreeing to the Gazprom imports as it prioritized exports to China even at the expense of domestic offtakes, and it is set to see domestic gas demand increase further because of its efforts to develop a gas-to-liquids industry to replace costly imports (largely from Russia).<sup>25</sup>

**While the gas prices of Uzbekistan's purchases from Gazprom are not disclosed, it continues to export to China despite the domestic demand increases driving overall exports down notably.**

While the gas prices of Uzbekistan's purchases from Gazprom are not disclosed, it continues to export to China despite the domestic demand increases driving overall exports down notably.<sup>26</sup> In short, what appears to be happening is that Uzbekistan can buy natural gas from

Russia for less than it sells it to China, and it is engaging in price arbitrage at Moscow's expense—a shift that will have long-lasting implications given it has required the reversal of pipelines that once exported Uzbek and Turkmen gas to Western Europe.

## Turkmenistan

While Russia has pushed for a larger “gas union” together with Tashkent and Astana, both Central Asian states have resisted formalizing such discussions.<sup>27</sup> Central Asia is finding ways to take advantage of Russia's weakened geo-economic position, even if no clear geopolitical break has yet emerged. Further evidence of this can also be found in gas pipeline developments. Over the last year, Beijing has signaled that it will prioritize restarting long-delayed plans for the construction of a fourth spur of its China–Central Asia pipeline over the Power of Siberia 2 pipeline.<sup>28</sup> Putin and Xi pledged to build the latter, aiming to more than double Russian natural gas exports to China on the eve of Putin's full-scale invasion of Ukraine, but it has since come to a standstill.<sup>29</sup> The fourth spur of the China–Central Asia pipeline, typically referred to as Line D, would also be the first to carry Turkmen gas, which forms the lion's share of Beijing's regional purchases via Kyrgyzstan and Tajikistan. Thus Bishkek and Dushanbe will earn transit fees for the first time. This would further cement Beijing's dominant position in regional energy markets and increase China's leverage to secure even larger price discounts from Russia than it

received in agreeing to the initial Power of Siberia gas pipeline in the months after Putin first invaded Ukraine in 2014.<sup>30</sup>

**Turkmenistan's transformation into a gas station for China has done little to fundamentally shift its geopolitics or its dictatorial ruling family.**

The transformation of Central Asia's gas networks and the establishment of Beijing's dominant position are of course not new stories; however, hopes that the weakened Russian economic position will transform the region's geopolitics should be tempered. Turkmenistan itself serves as a case in point. The hermetic dictatorship today exports more than six times as much gas to China as it does to Russia. It even went several years without exporting any to Russia before it struck a new deal in 2019 to supply five billion cubic meters per annum despite having been entirely dependent on the Russian export route until the launch of the first branch of the China–Central Asia pipeline in 2009. That sale agreement is due to expire this June—and it is hard to see it being renewed given Russia's loss of its European export market and the losses that Gazprom has suffered as a result.<sup>31</sup>

But Turkmenistan's transformation into a gas station for China has done little to fundamentally shift its geopolitics



Xi Jinping Meets with President Serdar Berdimuhamedov of Turkmenistan, August 2023.  
(Ministry of Foreign Affairs of the People's Republic of China)

or its dictatorial ruling family, “national leader” Gurbanguly Berdymukhammedov and his successor son, Serdar, in the presidential palace have little to gain from breaking with Moscow. In fact, the Berdymukhammedovs have even taken some action to address historical points of tension with Russia over the last two years. Most notably, in June 2022, Ashgabat finally allowed genuine dual citizenship for Turkmen-Russian dual nationals—a particularly poignant issue in the country given the pushing out of Russians in the 1990s, though one Putin has not raised publicly even as he has fantasized and propagandized about alleged discrimination against Russian citizens in Ukraine and Georgia.<sup>32</sup>

## Tajikistan and Kyrgyzstan

Nevertheless, there are emergent signs elsewhere in Central Asia of the new, depleted position of Russian political influence—as Rahmon’s comments reference. However, the significance of such comments should not be overstated. Regional leaders, such as the Tajik strongman, have their own domestic reasons to engage in such posturing. While Tajikistan has also joined Kazakhstan and Kyrgyzstan in curtailing Russian banking services in response to expanded US secondary sanctions threats announced in December 2023, its economy remains extremely dependent

on Russia for remittances given the fact that a large share of its population works in Russia either full time or seasonally and the Tajik government has acted to protect these.<sup>33</sup> The Tajik regime also has stepped back from the punches Rahmon was willing to pull in 2022, eliciting little response to the wave of Russian xenophobia pushed by state media against Tajiks after the Crocus City Hall concert venue attack claimed by Tajik nationals under the banner of the Islamic State on March 22, 2024.

**The Kyrgyz Republic stands out as one area in Central Asia where Russian influence has increased in recent years.**

The neighboring Kyrgyz Republic also stands out as one area in Central Asia where Russian influence has increased in recent years. President Sadyr Japarov came to power in October 2020, taking advantage of protests against that month’s parliamentary elections and, after being freed from jail, riding a nationalist and populist wave into the presidency and then winning the hastily organized election that was not seen as free or fair the following January. His predecessor Sooronbai Jeenbekov had reportedly requested Russian assistance multiple times with no avail before resigning. A visit by Putin’s deputy chief of staff Dmitri Kozak during the crisis appears to have emboldened Japarov during the unrest.<sup>34</sup> Although Jeenbekov was no Western



darling and had—alongside his own predecessor Almazbek Atambayev—already unwound many of the democratic reforms for which Kyrgyzstan was once hailed, Japarov has explicitly moved to align himself with Russia.

This has been evident not only from Japarov's decisions to clamp down on civil society and to pass a “foreign agents law” based on Russia's law and his regime's clamping down on protests against the Russian invasion of Ukraine.<sup>35</sup> Japarov has had some domestic stability concerns to manage in consolidating power that has made Russia a convenient partner, and Bishkek has also sought to keep the Kremlin from taking sides in the border clashes between the Kyrgyz Republic and Tajikistan that bookended Putin's launch of his full-scale invasion of Ukraine in 2022.<sup>36</sup> Beijing remained on the sidelines of that unrest, and subsequent negotiations on normalizing the border have occurred under the auspices of the Russian-led CSTO.

## Looking Ahead

Without a new major push by a third country or bloc into Central Asia—and such a development is so unlikely that it should not be seriously considered in planning future scenarios for the region. It appears Beijing is content to remain the economically dominant actor but leave Russia as the dominant political player in Central Asia, a reality that the region's strongmen have little incentive of their own to challenge.

**Putin's wanton war against Ukraine and the resulting international response has diminished Russia's geo-economic leverage over Central Asia while China's geo-economic position is set to continue to advance.**

But Putin's wanton war against Ukraine and the resulting international response has clearly diminished Russia's geo-economic leverage over Central Asia while China's geo-economic position is set to continue to advance. However, it is unlikely that Beijing will be prodded into changing its geopolitical approach to the region as a result. After all, for Beijing, Central Asia is as much an “inadvertent empire” as it is a springboard for a new Eurasian paradigm, and its relations with Russia will continue to be primarily shaped by other factors, including their joint antagonism for the West.

More and more pressure points will emerge in the Central Asia region, and it does offer a source for competition for alternative sources of gas as well as many of the other hydrocarbon and metals commodities that Russia is now increasingly dependent on its Chinese export market for. China and Russia may well be able to manage their ongoing shift of power in the region from Moscow to Beijing but almost entirely at Moscow's expense. That is sustainable for now but not forever. 🦋

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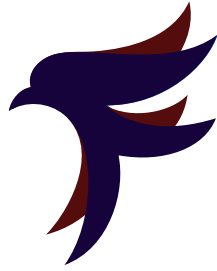
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