



Kazakhstan Institute  
for Strategic Studies  
under the President of  
the Republic of Kazakhstan



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# Central Asia Strategic Review 2026



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# Central Asia Strategic Review 2026

*Research Report*

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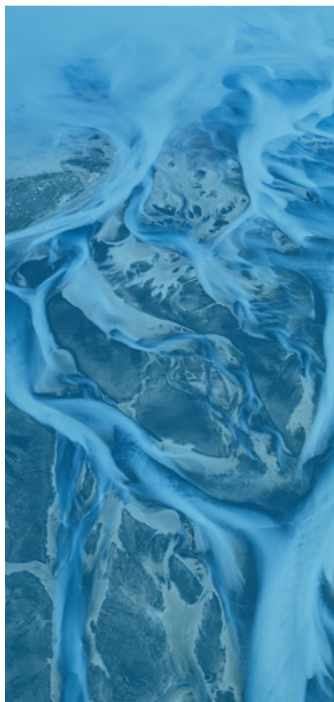
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This publication presents a comprehensive analysis of the key trends, risks, and development opportunities of Central Asia across geostrategic, economic, infrastructural, and socio-demographic dimensions. It addresses issues of regional resilience, the transformation of the region's transport and logistics role, water-energy interdependence, institutional development, and the influence of external factors on regional dynamics.

The publication is intended for a broad readership and may serve as analytical, academic-methodological, and reference material for international affairs experts, political scientists, regional studies specialists, public administration representatives, as well as lecturers and students.

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# EXECUTIVE SUMMARY

Central Asia in 2026 is entering a phase where the region's resilience is determined by the ability to **manage the growing interdependence between resources, infrastructure, institutions, and societal dynamics**. The region is simultaneously increasing its significance in Eurasia and facing a more complex environment, where external, infrastructural, and internal factors increasingly operate as a single system.

**The main structural risk is resource-based.**

The water factor is definitively moving into the category of a fundamental constraint on regional resilience. Water scarcity affects food security, energy, social stability, and interstate relations. Water is becoming a fundamental parameter of regional security and economic predictability.

**The key opportunity for the region is infrastructural connectivity.**

The formation of Central Asia as a transit and logistics hub between Europe and Asia is becoming a stable trend. At the same time, the competitiveness of corridors is also determined by the quality of governance: the predictability of procedures, digital compatibility, tariff coordination, and the elimination of bottlenecks. Without coordination, transit potential may turn into a source of internal competition and fragmentation.

**The quality of regional governability is becoming a critical factor.** With insufficient institutional coordination, external

projects, infrastructural decisions, and energy schemes begin to be embedded in a bilateral logic, which increases dependence on external decision-making centers. Regional agency is directly linked to the ability to develop coordinated procedures, data, and technical protocols in sensitive sectors.

**Socio-demographic dynamics determine the limits of resilience.**

Population growth, urbanization pressure, uneven territorial development, and labor market tensions increase states' sensitivity to economic and informational shocks. Societal resilience becomes a condition for the implementation of infrastructural and integration projects.

**The information environment strengthens or weakens regional cooperation.**

Polarization and vulnerability to external information influence can complicate interstate trust even when economic interests coincide.

Taken together, the regional environment is forming as a contour of mutually influencing factors: **external competition – infrastructure – institutions – societal resilience**.

A disruption of balance at any level is transmitted to the others. Therefore, the resilience of Central Asia is determined not by maximizing individual directions, but by the coherence of development across **four levels**:

# STABILITY OF CENTRAL ASIA



## RESOURCE LEVEL

Water, energy, food



## INFRASTRUCTURE LEVEL

Transport, logistics, digital connectivity



4

LEVELS



## INSTITUTIONAL LEVEL

Coordination and management mechanisms



## SOCIO-DEMOGRAPHIC LEVEL

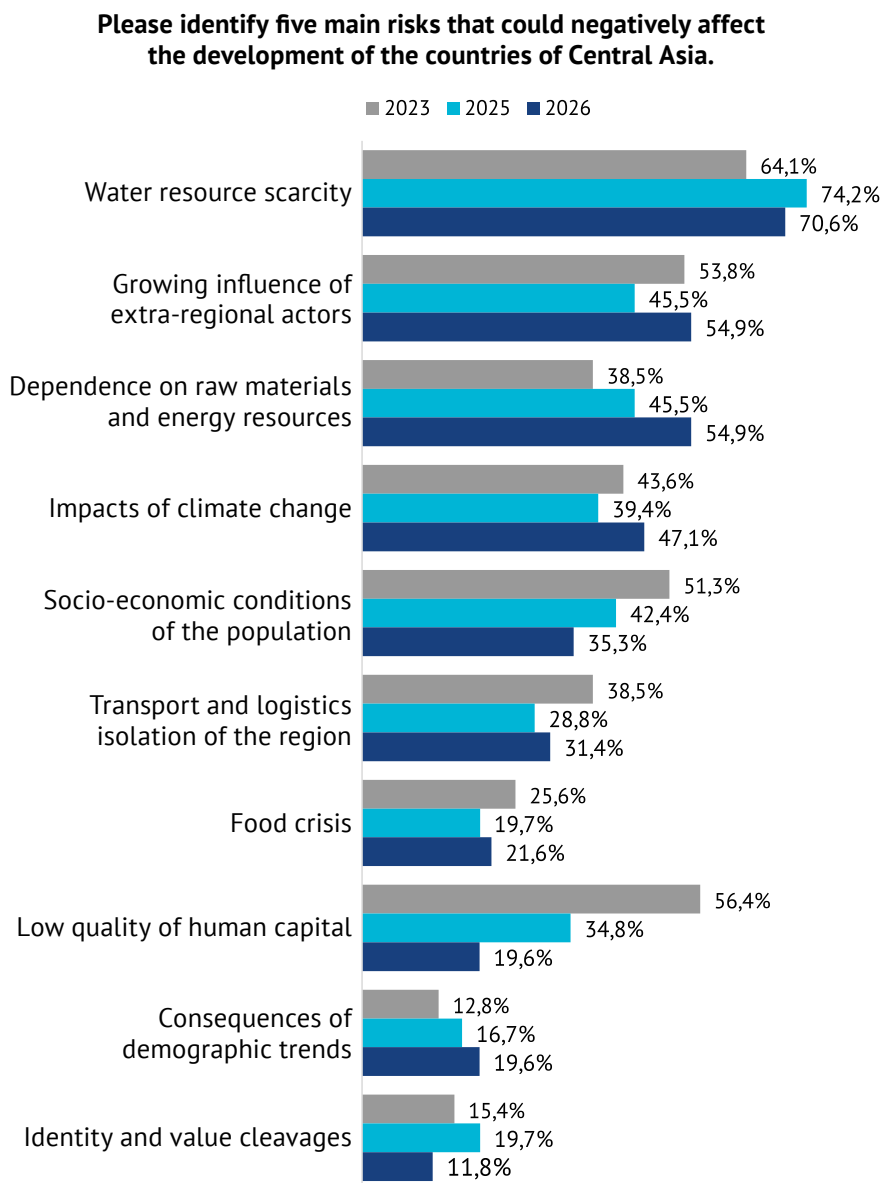
Human capital and social stability

The region is in a zone of opportunities. Its transit role is strengthening, cooperation formats are expanding, and the interest of external partners is growing. However, the very growth in Central Asia's significance makes the transition from a reactive model to a coordinated logic of action critically important, where governability becomes a key strategic resource.

The main task of the coming years is the formation of managed regional connectivity, allowing the balance between national priorities and regional logic to be maintained under conditions of active external pressure and high interdependence. This is precisely what becomes the basis for the long-term stability, predictability, and strategic flexibility of Central Asia.



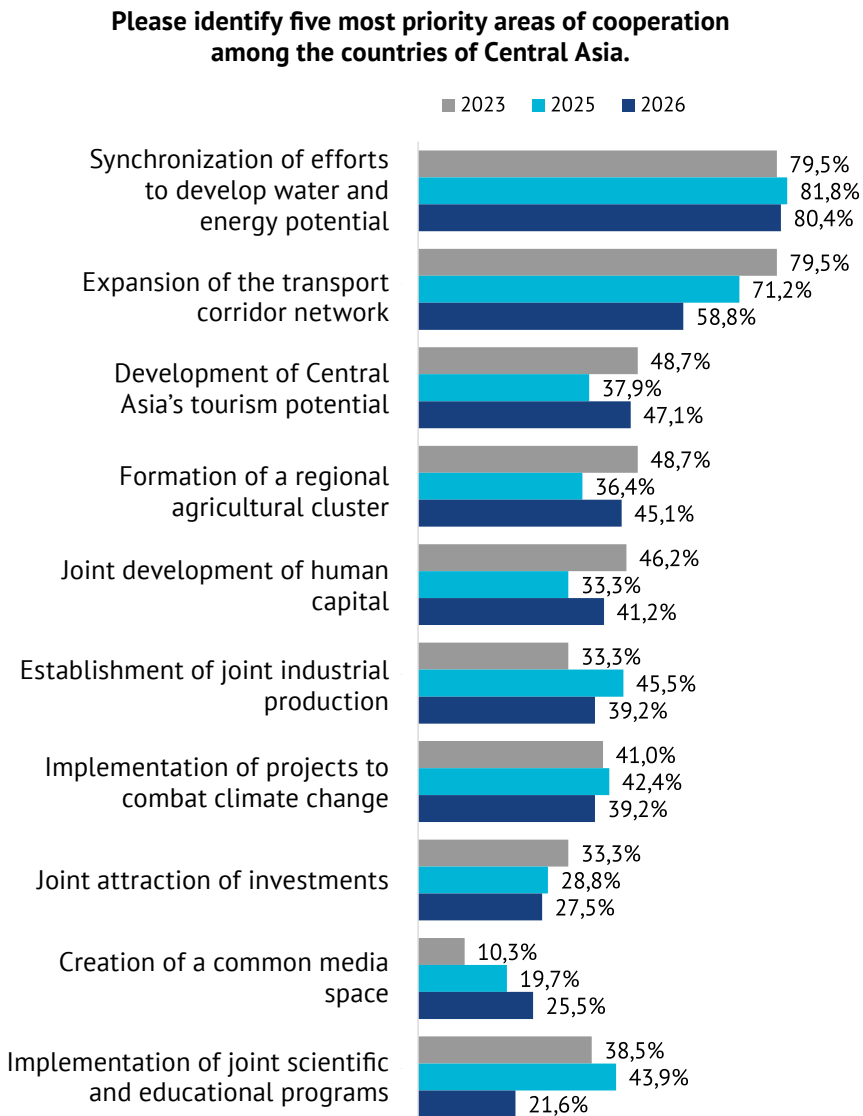
**Figure 1.** Dynamics of the perception of key risks in Central Asia (2023–2026)



**Source:** expert survey, KAZISS, 2023–2026.

**Figure 1** reflects the dynamics of expert perceptions of key risks for the countries of Central Asia in 2023–2026 and demonstrates a noticeable structural reorientation of the threat agenda. Water scarcity consistently occupies first place, increasing from 64.1% to 70.6%, which confirms the shift of the water issue from the environmental sphere into the category of a systemic factor of regional security. At the same time, the significance of the external factor is growing: the share of experts noting the strengthening influence of external actors exceeds half of the responses, indicating the perception of the region as a space of intensifying geopolitical competition. The increase in concern about the quality of human capital and socio-economic resilience is also significant, while demographic and identity-related risks remain background factors. Taken together, the dynamics show a shift from sector-specific threats to complex structural constraints, where resources, institutions, and social resilience form an interconnected system of risks.

**Figure 2.** Priority areas of regional cooperation among the countries of Central Asia in expert assessments (2023–2026), % of total responses



**Source:** expert survey, KAZISS, 2023–2026.

**Figure 2** demonstrates that expert assessments of priority areas of regional cooperation directly correlate with the structure of identified risks. The highest values relate to the synchronization of efforts in the water and energy sphere, reflecting the perception of the water factor as a fundamental constraint on regional resilience. The expansion of transport corridors remains the second most significant area, confirming the role of logistical connectivity as a key driver of economic resilience. Increased attention is also given to human capital, agricultural cooperation, and industrial integration, indicating an understanding of structural development constraints related to resource dependence and the quality of the economic base. Taken together, the dynamics show a transition from sectoral cooperation to a comprehensive model in which infrastructure, resources, and human capital are viewed as interconnected elements of regional resilience.

# INTRODUCTION

Central Asia in the mid-2020s is characterized by the simultaneous impact of external changes in the global system and internal transformational processes. The strengthening of geoeconomic fragmentation, the redistribution of logistics flows, technological competition, the growth of climate risks, and changes in global regulatory regimes are shaping a new operating environment for middle and small states. Under these conditions, the region is increasingly viewed as an autonomous subsystem of international relations with its own structure of interdependencies, internal constraints, and coordination opportunities.

The relevance of this study is determined by the nature of current regional dynamics. Water-energy imbalances, climate change, demographic trends, the dependence of economies on raw material exports, infrastructural heterogeneity, and differences in the institutional development of states form a stable set of factors exerting a comprehensive impact on economic growth, social stability, and the investment environment. These parameters create a system of interrelated constraints and opportunities in which decisions in one sphere inevitably affect others.

Regional coordination is developing primarily within a functional logic. The states of Central Asia view cooperation mainly as an instrument for solving applied tasks related to resource management, infrastructure development, adaptation to climate change, and security provision. Such a model of interaction does not imply rigid institutional integration, but is built on the practical alignment of actions in spheres of objective interdependence. This gives regionalization a flexible and sector-oriented character.

At the same time, the involvement of external actors in regional projects, transport routes, energy schemes, and technological initiatives is intensifying. The expansion of “C5+1” interaction formats creates additional opportunities for diversifying external economic ties, while simultaneously increasing the complexity of coordination and the requirements for the alignment of regional states’ positions. In this situation, the issue of agency acquires a practical dimension and is linked to the ability of countries to develop coordinated approaches.

In such conditions, the importance of expert-analytical support for regional processes increases. This involves the systematization of risks, the identification of zones of interdependence, and the development of applied analytical tools that make it possible to assess the consequences of managerial decisions in interstate and intersectoral dimensions. Strategic analytical documents perform the function of structuring the regional environment, creating a basis for aligning positions on infrastructure projects, resource management, and issues of sustainable development.

This study proceeds from the assumption that the strategic dynamics of Central Asia are determined by the interaction of four levels: resource-based (water, energy, food), infrastructural (transport, logistics, digital connectivity), institutional (coordination and governance mechanisms), and socio-demographic (human capital and social resilience). Changes at one level affect others, which requires a comprehensive approach to the analysis of regional processes.

The purpose of the study is to identify key trends shaping the geostrategic

environment of Central Asia in the medium term and to analyze the interrelationship between regional risks, economic opportunities, and coordination mechanisms. The tasks include systematizing expert assessments, analyzing recurring motifs of the regional agenda, identifying key zones of vulnerability and growth, and developing scenario options for development.

The empirical basis of the study consists of the results of expert surveys conducted in 2023–2026, covering representatives of the academic and analytical communities of the region's countries and external partners. The use of comparable questionnaire blocks makes it possible to record stable priorities, the dynamics of risk perception, and changes in the structure of expectations regarding regional cooperation. The work employs methods of qualitative content analysis,

comparative interpretation of expert assessments, and scenario modeling.

The novelty of the publication lies in the systematization of the regional agenda through the category of interdependent resilience, where economic, resource, infrastructural, and institutional processes are considered within a single analytical framework. The practical significance of the work is associated with the possibility of using the results in the formulation of regional policy, the development of coordination mechanisms, and the planning of infrastructure initiatives.

The work is intended for researchers of international relations, regional studies, and political economy, as well as for experts and practitioners involved in the development of regional cooperation programs.





# METHODOLOGY

The present study is based on a systemic approach to the analysis of regional processes, within which Central Asia is considered as a set of interrelated resource-based, infrastructural, institutional, and socio-demographic subsystems. Such an approach makes it possible to move from describing individual problems to analyzing interdependencies that determine the region's resilience under conditions of external uncertainty and internal transformation.

The theoretical and methodological framework of the work relies on an interdisciplinary combination of elements of regional studies, the political economy of international relations, and the analysis of complex interdependence. The region is viewed as a dynamic space of functional linkages, where coordination is formed around specific spheres of interaction. The focus is on the nature and depth of interdependencies, as well as their influence on states' ability to respond to external and internal challenges.

The analytical model of the study is built on the assumption that regional resilience is determined by the coherence of four levels: resource-based, infrastructural, institutional, and socio-demographic.

Each level is considered as a source of both risks and opportunities, and the key object of analysis is inter-level linkages. This approach makes it possible to identify "stress transfer" effects, when problems in one sphere amplify vulnerabilities in others, as well as to assess the potential of compensatory mechanisms of regional coordination.

The empirical foundation of the study consists of the results of multi-stage expert surveys conducted in 2023, 2025, and 2026. Representatives of the academic, analytical, and expert communities of the countries of Central Asia and the region's external partners participated in the surveys. The repetition of key thematic blocks of the questionnaires made it possible to ensure data comparability over time and to identify stable motifs of the regional agenda, changes in the structure of risk perception, and the transformation of cooperation priorities.

The data collection method belongs to the category of expert assessments, which implies recording the professional perception of processes. This choice is driven by the objective of the study, which is focused on analyzing strategic trends that require specialized interpretation. The data obtained were used to identify recurring thematic clusters, rank the significance of risks, and determine areas perceived by the expert community as zones of potential growth.

The processing of empirical materials was carried out using qualitative content analysis and comparative interpretation. At the first stage, responses were grouped into thematic categories reflecting the main directions of the regional agenda. At the second stage, the frequency of mentions and the semantic context of responses were compared, which made it possible to identify stable structures of expert perception. Special attention was paid to themes that retained high significance across different survey years, since they reflect structural factors.

An additional analytical tool is scenario modeling. Scenarios are constructed on the basis of a combination of identified trends, zones of vulnerability, and potential compensatory coordination mechanisms. The scenario approach is used not to predict specific events, but to analyze possible trajectories of the development of the regional environment under various configurations of external and internal factors.

One feature of the empirical base of the study is the institutional profile of the respondents. The surveys involved representatives of analytical and research structures of the countries of Central Asia, a significant proportion of whom are associated with national centers for strategic studies and expert units interacting with public administration bodies.

The formation of the expert network began within the framework of an international conference devoted to issues of the region's strategic development, held by KAZISS under the President of the Republic of Kazakhstan on January 20, 2023, in Astana. The conference was focused on discussing the future image of Central Asia and served as a platform for building sustainable professional dialogue between the region's analytical centers. Subsequently, this network became the basis for regular expert surveys, which ensured continuity of participants and comparability of assessments over time.

This composition of respondents determines the specificity of the data obtained. Expert assessments reflect a practice-oriented understanding of the constraints and opportunities of regional cooperation. This increases the applied

significance of the study, since the identified trends and priorities correlate with managerial logic and the institutional realities of the region.

Thus, the study's methodology combines systemic analysis, expert data, and scenario tools, which ensures a comprehensive consideration of the geostrategic environment of Central Asia. Such an approach makes it possible to move from describing individual challenges to analyzing the configuration of regional resilience and the mechanisms of its formation.

#### Sampling parameters:

- i **2023** – the survey was conducted from January 20 to January 26. **The sample size was 39 respondents**, participants of the expert meeting “*Central Asia – 2030: Images of the Future*” (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan).
- i **2025** – the survey was conducted from January 22 to February 17. **The sample size was 66 respondents** – experts on Central Asia from the countries of the region.
- i **2026** – the survey was conducted from January 16 to January 26. **The sample size was 51 respondents** – experts on Central Asia from the countries of the region.

In all three waves, a comparable structure of questions was used, which made it possible to trace the dynamics of expert assessments and identify stable trends in the perception of regional risks and opportunities.



# STRUCTURE OF GEOSTRATEGIC RISKS IN CENTRAL ASIA

Geostrategic risks in the region emerge as a stable constellation of factors that simultaneously affect economic dynamics, the parameters of interstate coordination, and the conditions of engagement with the external environment. Their significance lies in their capacity to reshape the strategic context of regional development. In this sense, these are not isolated challenges but trends that shape the decision-making landscape, impose constraints, and redistribute opportunities.

The risk structure in Central Asia is marked by concentration of pressure in several critical nodes where internal constraints intersect with external influences. These nodes do not exist in isolation: processes unfolding in one area typically spill over into others, altering the balance between growth opportunities and sources of instability. For this reason, the analysis is organized around key domains that generate cross-sectoral effects and transboundary consequences.

*The first cluster* of risks is rooted in the resource sphere, particularly in the management of water and related energy parameters. This is where constraints arise that affect production, social systems, and infrastructure development.

*The second cluster* concerns the spatial organization of economic activity, where

the expansion of transport and logistics connectivity creates both a window of opportunity and a field of competition.

*The third cluster* takes shape in the external dimension, reflecting the region's growing integration into networks of interaction with major powers, which alters the parameters of autonomy and complicates the alignment of regional agendas.

*The fourth cluster* of risks relates to internal governance and socio-demographic characteristics, which determine states' capacity to implement joint decisions and sustain stable development trajectories.

Together, these domains form a structure in which shifts in one block can amplify or mitigate pressures in others. The analysis that follows is therefore structured around thematic blocks representing the most significant zones of risk concentration. Each block is treated as a distinct component, yet its implications are interpreted in light of their impact on other dimensions of regional dynamics.

This framework enables a focused examination of specific themes, which are subsequently analyzed as key elements of Central Asia's geostrategic environment in the medium term.

# | Water Resources

**Scan.** In Central Asia, the water factor remains a systemic constraint on regional resilience. Growing water scarcity, the degradation of irrigation infrastructure, and agriculture's heavy dependence on trans-boundary sources are creating a persistent zone of governance risk. Water challenges heighten food security vulnerabilities, affect energy regimes, and increase the likelihood of interstate friction during periods of climatic anomalies.

The defining feature of the situation lies less in absolute resource scarcity than in the mismatch between the scale of the

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**Focus.** From a risk management perspective, the water agenda needs to be translated into a practical monitoring system. For geostrategic governance, water must become measurable and predictable.

A key requirement is the continuous **tracking of hydrological dynamics** across major basins, since changes in inflow, seasonal volatility, and reservoir levels directly shape state behavior and the social resilience of water-dependent territories.

At the same time, **infrastructure conditions** must be assessed, including water losses in networks and canals, the degree of digital oversight, the pace of modernization of hydraulic facilities and irrigation

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**Implications.** In terms of outcomes, water scarcity in Central Asia carries the risk of **regional disagreements**. As competition intensifies, states may gravitate toward bilateral arrangements, ad hoc exchanges, and pragmatic **"seasonal compromises,"** reducing the likelihood of a unified regional agenda.

challenge and the level of coordination. Existing mechanisms of interaction ensure dialogue and are in the process of forming a sustainable regime of joint management of the water–energy complex. A practical mechanism could be the establishment of an International Water Organization within the UN structure, initiated by the President of Kazakhstan in December 2025.

As a result, the water factor emerges as a primary resource risk capable of multiplying social, economic, and political pressures.

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systems, and the existence of joint water-saving projects.

It is also essential to monitor **political and institutional indicators** reflecting levels of mutual trust, including the frequency of dispute cases, negotiation episodes over quotas and discharge regimes, the presence of agreed seasonal water–energy exchange schedules, and signals of **water securitization in political rhetoric**.

Finally, water governance requires societal monitoring, where incidents in deficit-prone areas, declining crop yields, and migration flows function as early-warning indicators.

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Each uncoordinated action may be interpreted as a breach of overall balance, thereby raising transaction costs across all forms of interaction.

Economically, water risks imply mounting fiscal pressure, as infrastructure modernization becomes unavoidable, while rising

water costs feed into higher food prices, increasing social expectations and sensitivity to governance missteps.

In the energy and industrial sectors, the situation becomes more complex due

to the influence of hydrological regimes on hydropower generation and seasonal demand, which in turn reduces the predictability of industrial cooperation and the investment attractiveness of certain clusters.

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**Actions.** In this context, the most rational strategy for 2026–2027 is to move from political formulas to managed mechanisms that produce measurable outcomes while building trust.

A first practical step would be to launch a regional **early-warning system** based on a unified digital monitoring layer, making water governance a matter of shared transparency. This could begin as a pilot in one or two basins, with agreement on a limited set of indicators and data-sharing protocols, fostering joint oversight practices and reducing the space for conflicting interpretations.

A second priority should be a program to reduce water losses through **irrigation infrastructure modernization**, since the main water reserve lies not in finding new sources but in restoring lost volumes. This requires identifying priority segments for upgrade to ensure visible results within a year or in the near term.

A third direction involves the development and application of formalized **seasonal water-energy stability protocols**, designed to preempt crises during peak periods and reduce the politicization of operational decisions.

A fourth component is the creation of a **financial mechanism for water-related projects** that minimizes politicization and prevents infrastructure decisions from becoming instruments of external leverage.

Finally, the institutional baseline should not rely on building a cumbersome structure, but rather on several functional mechanisms such as technical committees on data and water accounting, harmonization of standards, and coordination of transboundary projects that deliver tangible impact without excessive bureaucracy.

Overall, the water agenda in the 2026-2030 horizon becomes a systemic geostrategic factor for Central Asia. It will shape food security, energy stability, social cohesion, and regional trust, while also affecting the viability of transit corridors through rising internal and external risks. If current institutional constraints persist, water challenges may evolve from scarcity into competition, reinforcing regional fragmentation and increasing opportunities for external influence. The most effective strategy for 2026-2027 therefore lies in moving **from declarative approaches to measurable tools** such as monitoring and digital accounting, loss reduction, seasonal stability protocols, and a lean institutional framework for data and transboundary governance.

## I External Actors

**Scan.** Findings from the 2023–2026 expert surveys show a consistent **perception of external actors** as one of the most significant drivers, capable of both **expanding development opportunities** for Central Asia and **creating systemic vulnerabilities** for regional cooperation.

Experts across countries repeatedly note that external activity around Central Asia is intensifying against the backdrop of global systemic transformation, growing economic and technological competition, sanctions-driven fragmentation, and the reconfiguration of Eurasian logistics.

It is important to emphasize that Central

Asia is interested in diversified partnerships and investment. However, the surveys indicate that key challenges may arise from **fragmented national tracks**, creating risks of strategic misalignment, competing priorities, and uneven speeds of convergence among regional states.

Expert assessments also link this challenge to other complex risks, including **water and climate stress, infrastructural isolation, resource dependence, and human capital deficits**. This suggests that the influence of external actors is seen as a factor that can either strengthen or weaken the region's collective capacity to respond to critical development challenges.

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**Focus.** The main task for 2026 in this domain is to ensure balanced **regional autonomy** while maintaining openness to international cooperation. In other words, Central Asia needs to structure external **engagement in ways that serve regional interests**, supporting economic interdependence, infrastructure resilience, and the institutional maturity of cooperation.

Monitoring should therefore focus on whether external engagement formats reinforce **regional connectivity** rather than solely advancing national projects. In practice, this means shifting from counting initiatives to assessing the quality of their architecture, with **regional added value** becoming a key criterion.

In this context, several signals should be tracked systematically. First, whether the share of external projects with **cross-border**

**integrative designs—transport networks**, energy linkages, unified digital solutions—is increasing.

Second, whether instances are rising in which different external initiatives compete for the region's limited resources, including corridors, logistics capacity, energy, water, and skilled labor.

Third, whether the complexity of **sanctions** constraints is increasing, potentially affecting supply chains, financial transactions, and the reputational standing of project participants.

Fourth, whether elements of **two-speed cooperation** are emerging, with groups of countries embedded in different strategic trajectories while the overall regional interaction framework weakens.

**Implications.** Strategically, intensifying competition among external actors affects Central Asia through several interconnected mechanisms.

First, there is a risk of the region gradually shifting from the role of an active agenda-setter to that of a **geographic space of transit and resources**—where external actors increasingly define the rules of engagement, project standards, and infrastructure interface parameters. In such a scenario, Central Asia may remain externally relevant while losing part of its collective capacity to shape long-term development priorities.

Second, there is an institutional effect. Survey results show that, at the current level of institutionalization, many experts see the need for additional coordination mechanisms. If the regional architecture remains weak, external initiatives will tend to consolidate along **bilateral trajectories**.

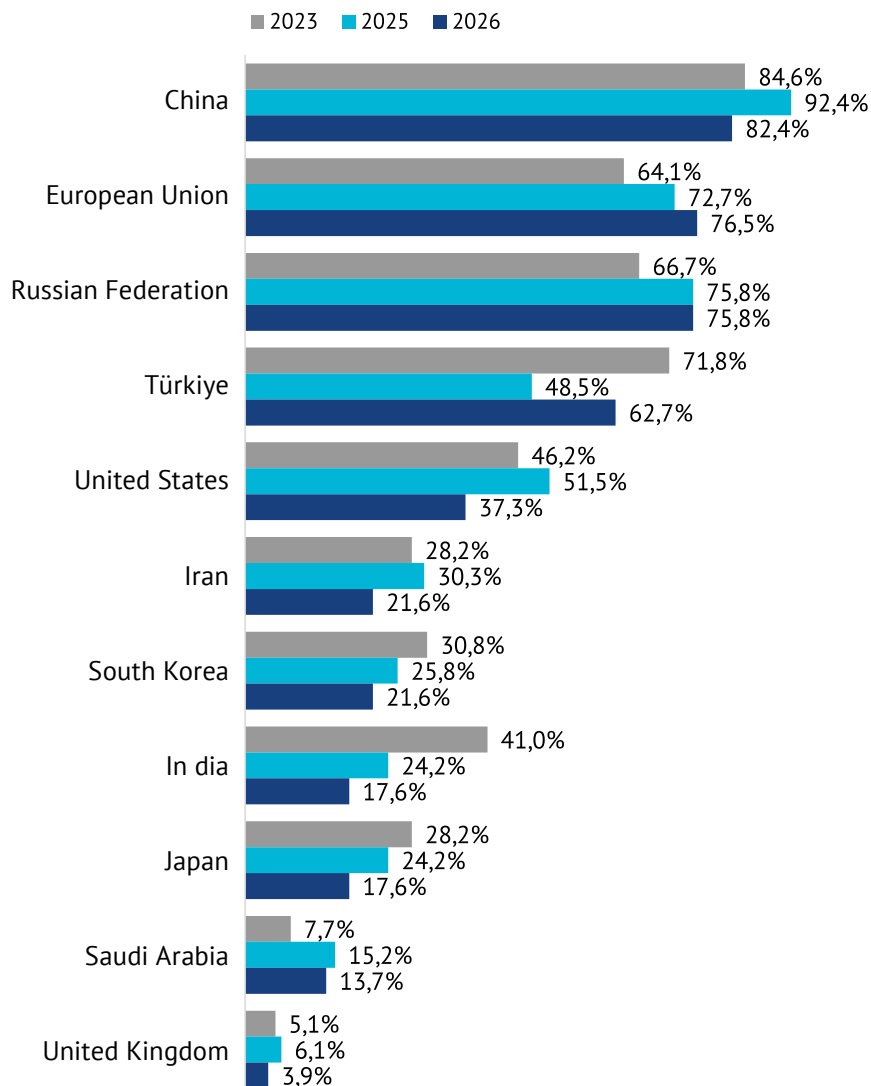
Third, there is a normative and reputational dimension. In conditions of global political and economic turbulence, commercial projects are increasingly likely to carry secondary political implications, and participation in them may be interpreted as part of broader foreign policy alignments. This heightens **sanctions, legal, and reputational risks** for both states and companies, particularly in infrastructure, energy, and logistics sectors.

Finally, it is important to note that the logic of external competition is often internalized within the region itself, provoking rivalry among states for the status of “key hub.” While this may be economically rational, the absence of agreed rules increases the risk that transport and energy cooperation will evolve along **parallel competing routes**, potentially weakening the region’s collective resilience during crises.



**Figure 3.** Priority external economic partners of Central Asia in expert assessments (2023–2026), % of respondents

**Please name the five most priority external economic partners for Central Asia.**



**Source:** expert survey, KAZISS, 2023–2026.

**Figure 3** reflects the structure of Central Asia's priority external economic partners in expert assessments and demonstrates the region's sustained multi-vector external orientation. China maintains a leading position, reflecting its role in infrastructure and investment projects. At the same time, the importance of the European Union is growing, indicating the expansion of economic and technological ties in the western direction. The Russian Federation remains one of the key partners, particularly in energy, transport, and labor mobility. Turkey is strengthening its role as a link to the South Caucasus and the Mediterranean direction. The declining share of the United States and several Asian partners in recent assessments reflects shifts in global geoeconomic dynamics and the redistribution of the region's attention. Overall, the structure does not indicate a shift toward a single vector, but rather the preservation of balance among various centers of economic gravity.



**Actions.** In 2026–2027, the region would benefit from moving toward a more systemic approach that can be described as **managing external engagement through regional priorities**. Central Asia seeks active cooperation with international partners through investment, technology transfer, access to global markets, and the development of transport and logistics capacity. The key practical issue, however, is to ensure that external cooperation strengthens rather than undermines the regional agenda.

*Four directions of action are particularly important.*

The first is the formulation of **shared principles of regional coordination**. This should not be viewed as closure or bloc formation, but as a pragmatic alignment tool in key domains such as infrastructure, water, energy, security, and digitalization. Common frameworks in these areas are necessary to minimize conflicts of interest and preserve predictability.

The second direction is strengthening the practice of **“common regional positions”** on sensitive issues. Survey responses frequently highlight the importance of synchronized efforts in the water–energy sector, transport corridor development, joint investment attraction, and climate projects. These areas should increasingly be translated into coordinated regional solutions, especially when they enter

international negotiation platforms and formats such as C5+1 or C6.

The third direction involves institutionalizing risk mitigation procedures, including **sanctions compliance** and reputational resilience. Major infrastructure and energy projects should be accompanied by unified regional standards for risk assessment and transparency. This would help prevent situations in which controversial project decisions by one party generate negative spillovers for the entire region.

The fourth direction is the creation of “anti-fragmentation” mechanisms for regional initiatives. Large external projects, for example, could be assessed based on **whether they strengthen Central Asia’s connectivity or deepen divides**. If a project risks increasing fragmentation, adapting it into a multi-country format—through consortia, regional components, open standards, or complementary routing—should be considered.

In parallel, coordination ahead of key regional events at the level of foreign ministries and sectoral agencies, the development of a concise list of regional priorities for international partners, and the establishment of a regular practice of position alignment on strategic issues such as infrastructure, water, digital connectivity, and security would further strengthen regional coherence.

# I Transit Hub and Corridors

**Scan.** Expert surveys reveal a stable narrative that **Central Asia is increasingly seen as an emerging Eurasian transit hub.** This trend is repeatedly identified as one of the most probable scenarios toward 2030 and as a key direction of economic cooperation. Transport and logistics are gradually becoming a structural driver of growth alongside energy, digitalization, and investment.

At the same time, surveys highlight rising tensions around transit potential. Experts frequently point to **growing competition among Central Asian states for transport flows** and the risk of new lines of rivalry, where infrastructure priorities begin to be perceived as a zero-sum game.

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**Focus.** The main practical challenge in corridor development is that infrastructure projects alone do not guarantee transit success. A corridor's competitiveness depends less on its presence on a map than on its **predictability, speed, digital integration, and operational manageability** from the perspective of market participants.

Experts emphasize the importance of eliminating **bottlenecks.** These include border and checkpoint issues such as queues and differing cargo requirements, bureaucratic procedures and controls, limited infrastructure capacity, and insufficient integration of national logistics systems into a unified framework.

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**Implications.** From a geostrategic perspective, the logistics agenda opens a window of opportunity for the region. In the coming years, transport routes and alternative corridors will remain central to Eurasian competition, placing Central Asia and the Caspian in a position of **high demand for connectivity.** This creates a chance to anchor a new model of regional development.

The **Caspian direction** occupies a special place in this context, including Trans-Caspian routes and connections with the South Caucasus, Turkey, and European markets. For regional countries, the Caspian represents both an arena for infrastructure expansion and a zone where the interests of major external partners intersect. The geostrategic dynamics are further shaped by expanding regional formats, including Azerbaijan's participation in the Consultative Meeting of Central Asian Heads of State, which effectively extends the cooperation framework toward the Caspian–Caucasus dimension. In this environment, corridor development—particularly the Middle Corridor and related multimodal routes—is seen as a promising growth area.

**Data and digital compatibility** are equally critical. Without digital transit support—through pre-arrival information exchange, electronic documentation, harmonized transit declaration standards, transparent tariff data, and visibility of capacity—promising routes remain vulnerable to delays and instability.

Monitoring should therefore focus on measurable indicators such as border crossing times, the number of control procedures, the share of digital documentation, tariff transparency, logistics predictability, and the presence of “single window” mechanisms and interagency coordination.

However, if corridor promotion remains primarily national rather than coordinated, **transit competition may intensify at the expense of complementarity.** Central Asia could then become a space of parallel routes competing for the same flows and investments.

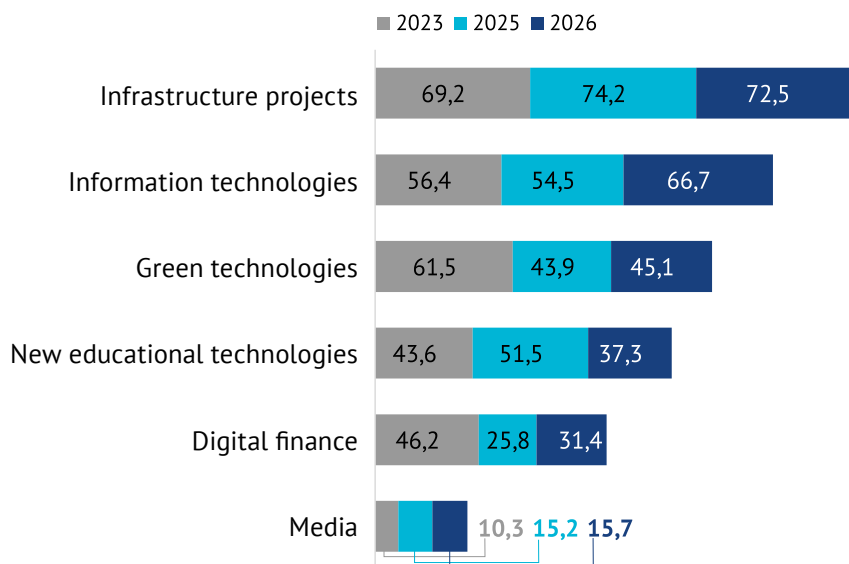
External competition among routes must

also be considered, as maritime logistics alternatives seek to reallocate Eurasian trade flows. Weak internal coordination

may therefore result in the region losing ground in terms of management quality, predictability, and institutional efficiency.

**Figure 4.** Promising areas of economic growth for Central Asian countries in expert assessments (2023–2026), % of respondents

**Which promising sectors could become growth points for Central Asia?**



**Source:** expert survey, KAZISS, 2023–2026.

**Figure 4** shows that expert views on future growth points for Central Asia form a clearly defined infrastructure–digital development vector. Infrastructure projects consistently rank first, reflecting the understanding of the region as a space of logistical connectivity and a transport hub of Eurasia. The role of information technologies is increasing, indicating a shift toward the digital dimension of economic interdependence. Significant attention continues to be given to green technologies, confirming the perception of the climate and resource agenda as a driver of economic modernization. Educational technologies and digital finance complement this picture, shaping the contours of a knowledge- and service-based economy. Overall, the response structure indicates a shift from a resource-based model toward an infrastructure and technology-oriented development trajectory.

**Actions.** In 2026–2027, the focus should shift from discussing corridors as a promising concept to building **transit as a regionally managed product**, where service quality, predictability, speed, and shared principles of interaction are central. The sustainability of Central Asia’s and the Caspian’s transit role depends not only on geography but on **institutional and operational compatibility** understood by global shippers and logistics operators.

The first area of action involves devel-

oping a **coordinated expert and business vision** of corridors as a single ecosystem. Analysts, logistics operators, carriers, and industry associations could contribute market-based perspectives on corridor development, identifying critical segments, procedural bottlenecks, and high-impact solutions. Survey findings emphasize that institutionalizing cooperation in transport remains a key gap, underscoring the need for a unified framework of agreed rules and principles recognized by the market.

The second direction is accelerated digitalization and data exchange, with a focus on compatibility and integration. Operators, logistics firms, brokers, digital service providers, and industry associations play a critical role in advancing practical solutions. Measures include expanding the use of electronic waybills, pre-declaration systems, digital container tracking, risk data exchange, and elements of “single window” transit systems.

The third direction is strengthening roadside and supporting infrastructure. Transit corridors require an operational ecosystem that includes rest areas, service zones, logistics hubs, warehousing, repair facilities, food services, sanitation, and secure parking. In this area, private initiative often outperforms the state in speed, quality, and economic efficiency. When service infrastructure develops through business-led initiatives, it becomes a natural source of revenue, investment, and innovation.



# I Institutionalization of Central Asia

**Scan.** In recent years, expert assessments reveal a clear duality in perceptions of regional institutionalization. On the one hand, a significant share of respondents point to an **insufficient level of formalization of cooperation**, particularly in applied sectors such as transport, water management, energy coordination, and food security. Regional interaction is seen as politically necessary but institutionally under-anchored.

On the other hand, responses also reflect concern about **duplication of formats and “institutional overload.”** Some experts note that creating new structures without

a clearly defined functional niche may lead to diluted focus, competition among platforms, and formal rather than substantive interaction. In this context, institutionalization is viewed as a tool that must be strictly proportional to practical tasks.

Central Asia thus faces both a shortage of effective working **institutions in separate sectors** and **skepticism toward excessive formalization** if it fails to deliver measurable results. This reflects the region’s transition from a stage of political rapprochement to one requiring a more refined, functional architecture of cooperation.

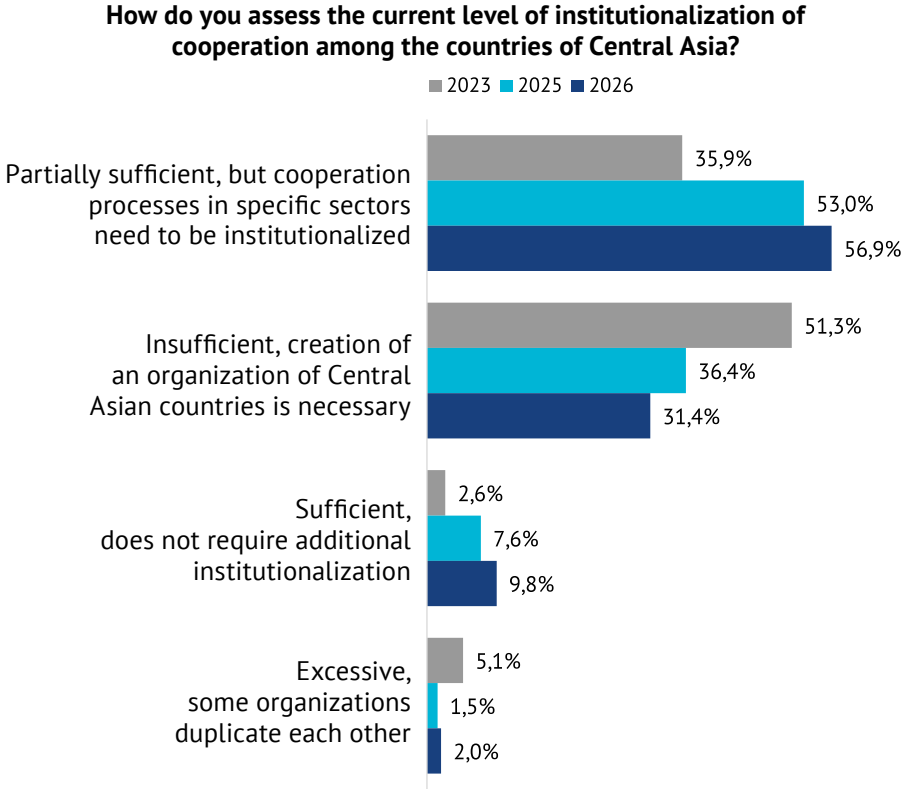
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**Focus.** Under these conditions, the key question shifts from “creating a new organization” to a more practical level: **which specific functions most urgently require an institutional framework?** Expert assessments suggest that the strongest demand for stable mechanisms lies in three areas: water–energy coordination, the transport corridor agenda, and regional resilience issues (food security, climate, and humanitarian risks).

The focus should therefore be on selecting two or three functional tracks where institutions operate as service mechanisms—for example, data collection and exchange, technical coordination, procedural alignment, and monitoring of agreed commitments. Such an approach can reduce the risk of bureaucratization and make institutionalization a tool that supports policy rather than an end in itself.



**Figure 5.** Expert assessment of the level of institutionalization of regional cooperation in Central Asia (2023–2026), % of respondents



*Source: expert survey, KAZISS, 2023–2026.*

**Figure 5** shows a shift in expert assessments from calls to establish a large regional organization toward support for functional, sector-specific institutionalization. While in 2023 the dominant view emphasized the insufficiency of existing mechanisms and the need to create a dedicated organization of Central Asian states, by 2026 most respondents consider the current level of cooperation partially sufficient, provided that institutionalization advances in specific sectors. The share of supporters of a “large” organizational model has noticeably declined, whereas extreme positions (complete sufficiency or excess of institutions) remain marginal. This indicates the emergence of a consensus around a pragmatic model of “light institutionalization,” focused on functional mechanisms rather than the creation of a supranational structure.



**Implications.** The absence of устойчивые institutions can generate additional costs for the region. Water, transport, and energy agendas by their nature require regular synchronization of decisions, information exchange, and predictability of rules.

A deficit of institutional coordination increases the likelihood of unaligned projects, duplication of initiatives, delays in corridor implementation, and heightened seasonal tensions. This may also lead to

excessive informational noise in the public sphere.

At the same time, the risk of “over-institutionalization” without clearly defined mandates can produce the opposite effect (for example, the formal existence of structures without real influence on processes). This undermines trust in the formats themselves and creates a sense of fatigue toward integration initiatives.

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**Actions.** In this context, a “light institutionalization” model appears most rational, prioritizing compact functional mechanisms over the creation of large suprastructures. One option is to establish a small coordination secretariat or platform serving as a hub for data exchange, meeting support, monitoring of decisions, and facilitation of sectoral tracks.

In addition, forming **sectoral technical committees** in priority areas—water, transport, energy, and climate—with clearly defined mandates and regular work cycles could help translate political agreements into practical outcomes without excessive institutional burdens.

The financial dimension could also develop in a “light” format through targeted funds or project windows dedicated to regional initiatives, ensuring support for joint projects.

Overall, the task for 2026–2027 may be to ensure that institutionalization in Central Asia is perceived as **enhancing the manageability and regularity of regional interaction**. Such an approach balances the need for stable mechanisms with caution toward over-formalization, preserving flexibility and the practical orientation of regional cooperation.



# I Socio-Economic Vulnerability

**Scan.** In expert assessments, the socio-economic situation of the population consistently appears among the key risks for Central Asian countries. This issue is increasingly viewed as a **factor of regional resilience**, capable of either strengthening or weakening states' geostrategic positions. Social stability, access to employment, price dynamics, and inequality levels form the foundation of public trust and predictability, without which even the most advanced infrastructure and integration projects become difficult to implement.

A distinctive feature of the current period is the increasingly **complex nature** of socio-economic vulnerability. Population growth and demographic pressure in several countries heighten the burden on labor

markets, education systems, and urban infrastructure. At the same time, a high share of informal employment, the dependence of certain sectors on external market conditions, and sensitivity to price fluctuations in food and energy increase societies' exposure to both external and internal shocks.

Regional disparities are also becoming more pronounced. The contrast is widening between dynamically developing urban centers and rural areas, where access to services, infrastructure, and employment opportunities remains limited. As a result, socio-economic issues are gradually becoming a **cross-cutting context** within which other strategic directions—such as transit corridors and water–energy projects—are implemented.

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**Focus.** In this context, the key focus shifts from overall economic growth to the **social quality** of that growth. Employment parameters are of particular importance, especially job creation for youth and in regions with limited economic diversification. Price dynamics for food and basic services remain a sensitive indicator, as they directly shape perceptions of economic stability.

Monitoring inequality—both interregional and intra-urban—is also critical, as it affects access to opportunities and levels of social

tension. Special attention should be given to the resilience of urban and rural areas, including infrastructure conditions, access to social services, and the quality of transport and logistics connectivity, which determine territories' capacity to adapt to shocks.

Thus, the socio-economic agenda requires comprehensive monitoring of interconnected parameters such as employment, prices, regional disparities, demographic trends, and the condition of urban and rural infrastructure.

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**Implications.** Socio-economic vulnerability directly affects the region's geostrategic resilience. As internal pressures accumulate, the risk of rising protest potential increases, along with societal sensitivity to economic and informational influences. Even limited economic shocks can acquire a political dimension if they coin-

cide with existing expectations and social imbalances.

An additional consequence may be increased migration pressure, both internal—between regions and countries of Central Asia—and external. This affects labor markets, social support systems, and

demographic structures, creating new governance and planning challenges.

Socio-economic instability also reduces states' ability to focus on long-term stra-

tegic projects. Under heightened domestic sensitivity, attention and resources shift toward short-term responses, potentially slowing the implementation of regional infrastructure and integration initiatives.

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**Actions.** In these conditions, socio-economic resilience can be viewed as an area where regional interaction complements national efforts. One direction could be the development of joint initiatives in food security and logistics aimed at reducing price volatility and ensuring supply predictability. Coordination in agricultural and logistics sectors can mitigate the impact of external shocks and strengthen mutual resilience.

It is also advisable to consider expanding regional programs in employment and education, particularly through experience-sharing, workforce training, and support for

professional mobility. The involvement of educational, technological, and business communities can help form a more integrated labor market and reduce imbalances.

Special importance should be attached to developing crisis coordination mechanisms, including information exchange and the alignment of measures during periods of price or economic fluctuations. Such steps enhance predictability and reduce the element of surprise. Overall, these measures allow socio-economic resilience to be treated not only as a domestic issue for each country, but as a component of broader regional stability.



# I Demography and Migration

**Scan.** Demographic dynamics are steadily becoming one of the key long-term factors shaping Central Asia’s socio-economic and geostrategic context. Expert assessments already frame demography as an area of growing risk, and its impact is likely to become even more pronounced by the 2030 horizon. Population growth in several countries increases pressure on education, healthcare, employment systems, and urban infrastructure, while also creating substantial human capital potential.

At the same time, migration mobility is intensifying, both within the region and beyond. Labor migration has become a structural component of economic models,

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**Focus.** Attention in this area centers on intra-regional labor migration, urbanization trends, and emerging skills gaps. Tracking the scale of workforce movements and their qualification profiles is crucial, as mismatches between skills supply and economic demand generate additional risks.

The condition of urban services and infrastructure—transport, housing, utilities, education, and healthcare—remains a key indicator, as these systems face mounting

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**Implications.** Growing demographic pressure and migration mobility create several strategic consequences for the region. Competition for human capital intensifies, potentially leading to uneven distribution of skilled labor and widening development disparities.

Without sufficient adaptation of labor markets and social infrastructure, the risk of social dissatisfaction increases, particularly in rapidly growing cities where employment, service access, and living

influencing household incomes, labor markets, and demographic balances.

Urbanization is also accelerating. Major cities attract younger populations, while rural areas experience outflows of working-age residents. As a result, demography is reshaping patterns of economic activity and infrastructure demand.

A defining feature of the current phase is that demographic processes are advancing faster than labor market institutions and social infrastructure can adapt. This creates a zone of social tension between rising expectations and the real capacity of economies to respond.

pressure from population inflows. At the same time, developments in rural and peripheral regions must be monitored, where the outflow of working-age populations affects economic activity and social resilience.

The demographic agenda therefore requires comprehensive monitoring of interconnected processes, including labor mobility, urbanization, human capital quality, and infrastructure’s ability to adapt to changing demands.

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conditions become pressing issues. Strain on services may reduce urban quality of life and heighten societal sensitivity to economic fluctuations.

Migration processes also deepen interdependence among regional states. Remittances, cross-border labor flows, and educational mobility become integral parts of the shared economic architecture. While this opens avenues for cooperation, weak coordination may produce imbalances and greater vulnerability to external shocks.

**Actions.** In this context, developing coordinated approaches to labor mobility within the region could be beneficial. Gradual convergence of procedures and regimes facilitating legal employment and protecting workers' rights would enhance predictability and reduce informality.

Expanding reskilling practices and introducing new educational tools may also improve human capital utilization and narrow skills gaps. Involving educational institutions, professional associations, and the business community can give these efforts a practical orientation.

Further steps could include joint educational and professional pathways, such as regional workforce training programs and coordination in technical and vocational education. Such measures would foster a more integrated regional labor market and strengthen economic resilience to demographic and external challenges. Overall, the demographic and migration agenda can be seen as an area where coordination and experience-sharing enhance the adaptive capacity of regional states.



# I Identity, Values, and the Information Space

**Scan.** In expert assessments, issues of identity, value divides, and the information environment may not always rank highest, but they consistently appear as background, gradually intensifying risk factors. Their importance lies in the fact that social and economic processes are increasingly filtered through perception, while the information space becomes the arena where expectations, trust, and interpretations of events are formed.

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**Focus.** The central focus in this domain is the quality of the information environment and the dynamics of public narratives. It is important to monitor the tone of media discourse on sensitive issues—interethnic relations, historical memory, social differences, and religious themes—as well as the spread of disinformation and manipulative interpretations.

Equally significant is societies' capacity to distinguish reliable information from

**Implications.** Polarization in the information and value space can heighten societies' vulnerability to external informational influence. Where internal tensions exist, even limited information campaigns may have disproportionate effects, shaping public sentiment and perceptions of regional cooperation.

This can complicate interstate trust, as media-driven interpretations of events may generate public expectations that do not

**Actions.** In this context, it may be useful to develop shared principles of information hygiene and professional standards aimed at improving the quality of public

The region is characterized by a diversity of historical, cultural, and religious traditions, which in itself is a resource but can, under certain conditions, become a line of sensitivity. As digital platforms expand and cross-border information flows intensify, the role of the media environment and public narratives grows, with the capacity both to strengthen regional mutual understanding and to deepen divisions.

emotionally charged or polarizing content. Particular attention should be paid to interactions between the national media spaces of regional countries, as these shape mutual perceptions and levels of trust.

The information and value sphere therefore requires monitoring the resilience of institutions that support professional journalism, media literacy, and responsible public debate.

align with diplomatic dialogue. In the long term, information polarization may hinder the implementation of joint projects if they are viewed through lenses of distrust or competing narratives.

At the same time, the information environment can serve as a platform for strengthening mutual understanding. With appropriate development of professional and educational initiatives, it can become a factor of regional resilience.

discourse. The emphasis should be on supporting professional and educational initiatives that strengthen media literacy and analytical culture.

Expanding the exchange of analytical insights among research and expert institutions in the region can contribute to more balanced interpretations of sensitive issues. Regional educational and media initiatives—joint events and professional dialogues—can enhance mutual understanding and reduce space for polarizing interpretations.

Additionally, it may be beneficial to develop professional coordination in countering

disinformation, based on fact-checking and expert analysis rather than censorship. Such an approach strengthens trust in information institutions and reduces societal vulnerability to manipulative influences.

Overall, the value and information agenda can be viewed as an element of the region’s “soft infrastructure,” the condition of which influences the resilience of interaction in economic, social, and political spheres.



# CONCLUSIONS

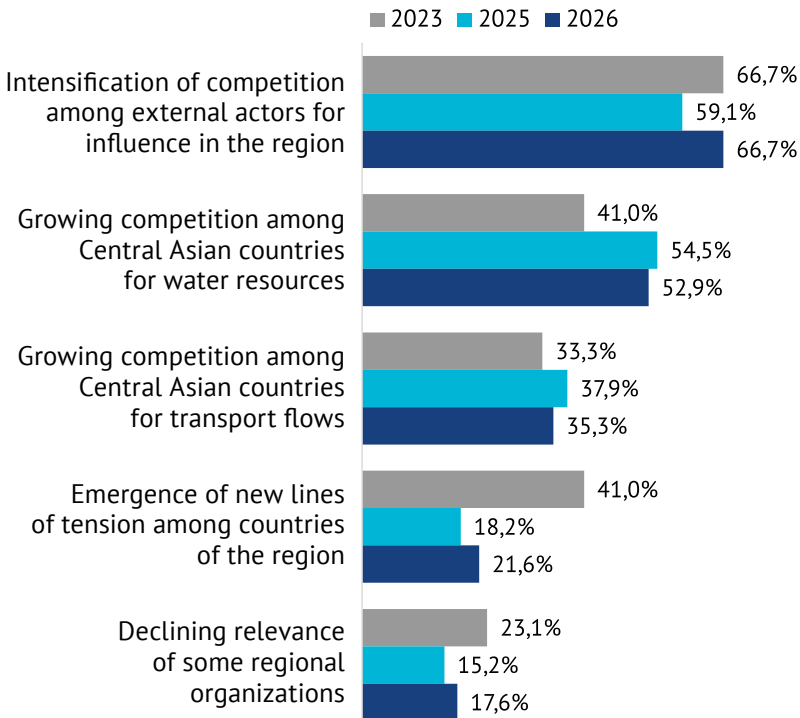
Taken together, the themes outlined above show that Central Asia’s geostrategic dynamics this year are shaped less by isolated events and increasingly by an **interconnected system of factors forming** a single environment of regional resilience.

Expert assessments indicate that water stress, competition among external ac-

tors, transit transformation, institutional challenges, socio-economic vulnerability, demographic pressure, and information-value differences can reinforce one another. This creates a **geostrategic architecture** of challenges in which changes in one sector inevitably affect others.

**Figure 6.** Potential risks of fragmentation and intensification of competition in Central Asia in expert assessments (2023–2026), % of respondents

**Please identify five most likely trends in Central Asia in 2030.**

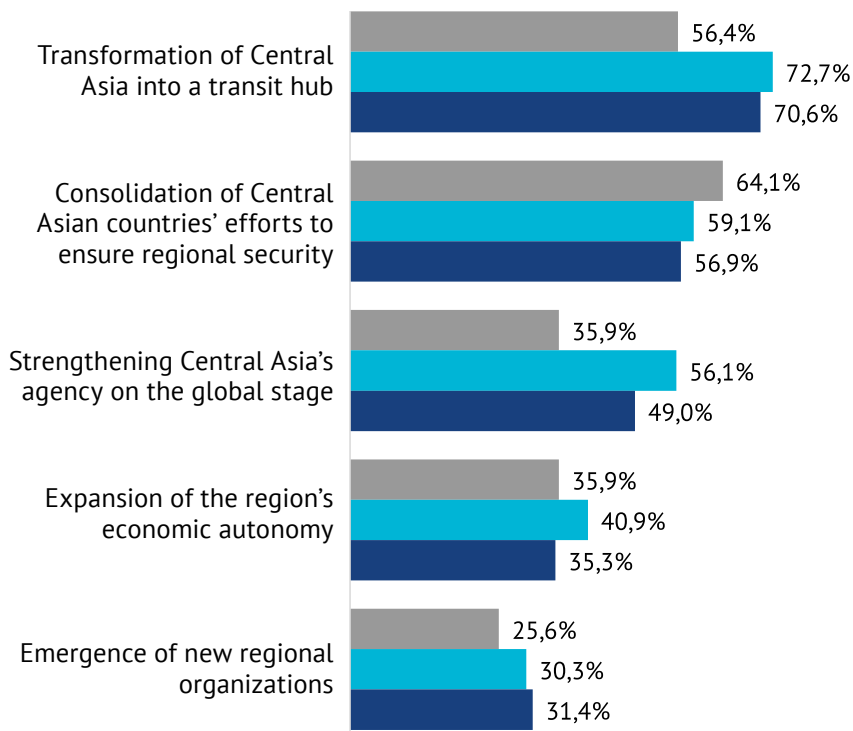


**Source:** expert survey, KISI, 2023–2026.

**Figure 6** reflects experts’ perceptions of the factors that could intensify regional fragmentation. The most **устойчивым** risk remains the growing struggle of external actors for influence, which confirms the persistence of external pressure as a systemic background of regional development. At the same time, there is increasing concern about competition for water resources and transport flows, indicating a shift of the infrastructure and resource agenda into the sphere of potential interstate tensions. The emergence of new lines of tension and the weakening of the role of certain regional formats are also perceived as possible but secondary risks. Taken together, the data indicate a likelihood of growing fragmentation trends in the absence of effective coordination mechanisms.

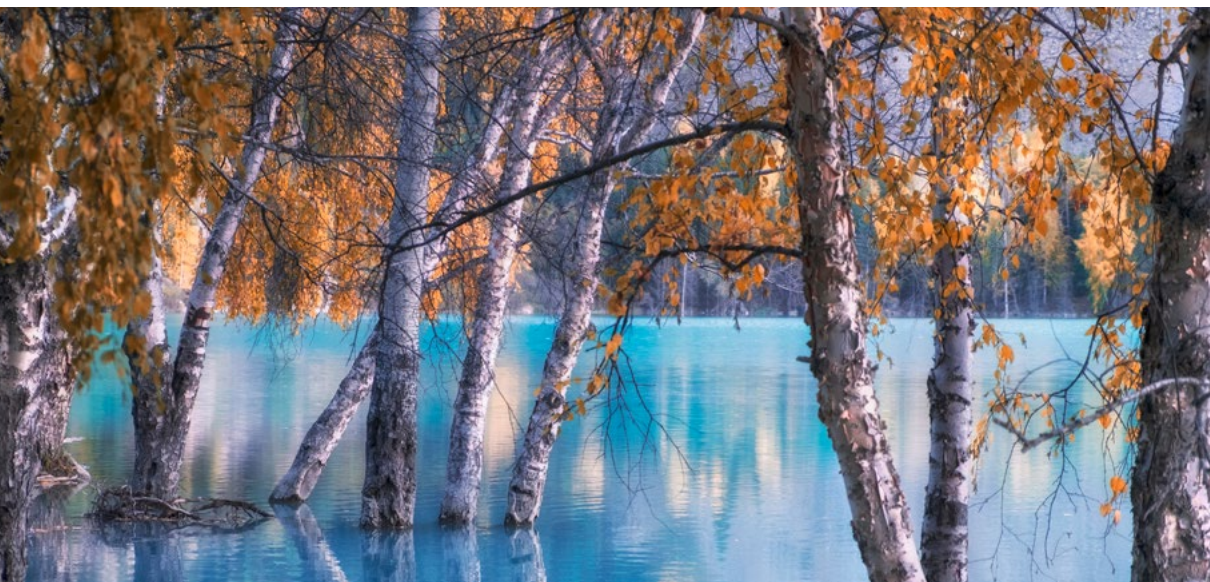
**Figure 7.** Expected directions of strengthening connectivity and agency of Central Asia in expert assessments (2023–2026), % of respondents

**Please identify five most likely trends in Central Asia in 2030.**



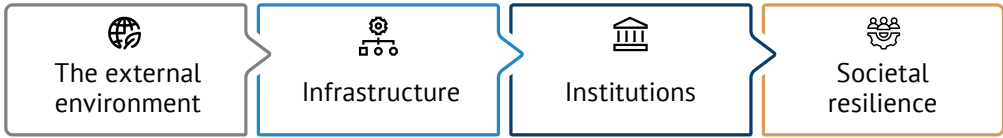
*Source: expert survey, KISI, 2023–2026.*

**Figure 7** demonstrates a parallel consolidation vector in the region's development. The transformation of Central Asia into a transit hub remains the most устойчивым expectation, highlighting the role of logistical connectivity as a structural foundation of regional growth. Significant importance is also attached to coordination of efforts in the field of security and to enhancing the region's agency on the global stage. Economic autonomy and the emergence of new formats of cooperation are viewed as additional elements of this dynamic. Taken together, the assessments show that alongside the risks of fragmentation, there remains a strong potential for integrative development based on infrastructure, security, and a shared external position.



A defining feature of the current stage is that **external risks increasingly manifest through internal channels**. Competition among external actors contributes to the fragmentation of infrastructure projects and the politicization of economic decisions; infrastructure constraints, in turn, slow growth and heighten social sensi-

tivity; institutional weakness complicates coordination of regional responses; and socio-economic conditions combined with information disruptions can reduce societies' resilience to both external and internal shocks. As a result, a chain of interlinked factors emerges:



In this framework, the water agenda represents the foundational resource-level risk, transit corridors the economic–infrastructure level, institutionalization the level of governance capacity, and socio-demographic and informational dynamics the level of societal resilience. Imbalances at any one of these levels can transmit pressures across the others. Regional resilience therefore depends not on maximizing a single direction, but on the **coherence and balanced development of all four levels**.

At the same time, expert assessments suggest that the region is entering a zone of opportunity. Central Asia is gradually consolidating its role as a transit and economic hub between Europe and Asia, strengthening its agency, expanding formats of cooperation, and attracting growing interest from key external partners. Yet precisely this growing importance makes it critical to move from a reactive management model toward a more coordinated and predictable approach. **Geostrategic resilience increasingly depends on the quality of regional governance**.

From this perspective, the key task in the coming years is the gradual formation of **managed regional connectivity**. Such an approach helps maintain balance between national priorities and regional logic, which is especially important amid heightened external interest in the region.

Expert assessments show that regional resilience is shaped through the interaction of resource, infrastructure, institutional, and social factors. In this sense, Central Asia is entering a phase in which resilience depends on the degree of managed connectivity across infrastructure, institutions, and society.

Overall, the geostrategic situation in 2026 indicates that Central Asia's future will be determined by the region's ability to **internally synchronize infrastructure, institutions, and societal resilience**. This connectivity forms the foundation for long-term stability, predictability, and attractiveness to partners. In this context, Central Asia stands at a point where risks and opportunities are evolving in parallel, and the decisive factor becomes the quality of coordination and trust.

# POSSIBLE SCENARIOS FOR 2026-2030

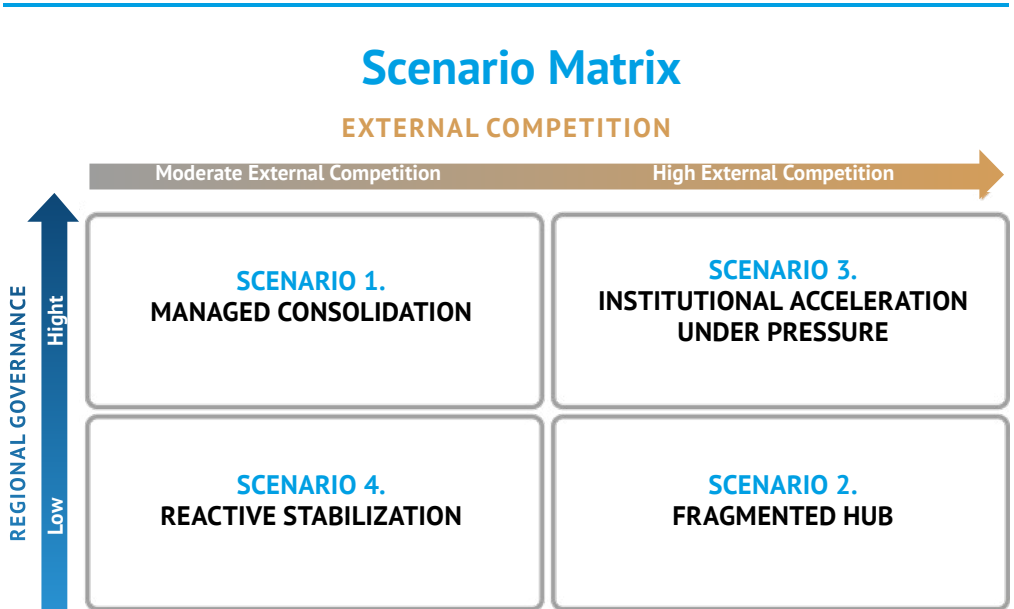
The point of departure for the scenario analysis is the study's core premise that the main external risks for Central Asia materialize through internal channels of the regional system, forming an **interconnected framework linking the external environment, infrastructure, institutions, and societal resilience**.

The analysis is based on a matrix of two key uncertainties.

The first reflects the intensity of external competition and the degree of political-

ization of economic decisions, including sanctions-related, legal, and reputational risks for infrastructure, energy, and logistics projects.

The second captures the quality of regional governance—namely, the level of coordination of rules, procedural predictability, and the capacity to maintain a shared agenda, which in practice means moving from a reactive model to a coordinated pattern of interaction. The combination of these parameters produces four possible scenarios.



## I SCENARIO «MANAGED CONSOLIDATION»

**External competition is present, but the region acts in a coordinated manner through agreed rules and procedures.** External projects enhance connectivity and do not generate intra- or inter-state conflicts of interest.

### Key features:

- Border crossings operate quickly and predictably (stable timelines and procedures);
- Water management issues are addressed according to pre-agreed schedules and technical protocols;
- Technical agencies and working groups operate regularly regardless of summit cycles;

- Large-scale projects are structured in multilateral formats with comparable data and documentation requirements.

### Early indicators (2026–2027):

- Increasing share of jointly agreed procedural solutions in transit (documents/data/checkpoints);
- Decline in cases where infrastructure projects acquire secondary political burdens;
- Emergence of stable mechanisms preventing the spillover of external competition into the region.

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## I SCENARIO «INSTITUTIONAL ACCELERATION UNDER PRESSURE»

**External pressure and politicization of economic decisions intensify,** but the region responds through accelerated coordination. External engagement is managed through regional priorities, and procedures become more predictable.

### Key features:

- Establishment of permanent technical committees and coordination mechanisms;
- Harmonization of procedures and data exchange initiated in response to crises and risk exposure;
- Joint resolution of water issues during difficult seasonal periods based on agreed operational regimes;

- Formation of common positions in external platforms and mechanisms for prior legal and political risk assessment of projects.

### Early indicators (2026–2027):

- Launch of a permanent regional risk-monitoring and procedural compatibility mechanism;
- Introduction of standardized pre-screening procedures for sanctions/legal/reputational risks in major projects;
- Reduction of internal competition for “hub status” through coordinated functional specialization.

## I SCENARIO «REACTIVE STABILIZATION»

The external environment remains relatively stable, but the region does not capitalize on available opportunities due to weak coordination. The agenda remains a set of parallel priorities, while procedures develop unevenly.

### Key features:

- Interaction remains concentrated at the political level, with insufficient technical harmonization;
- Water-related disagreements accumulate, and sensitivity to seasonal fluctuations increases;
- High vulnerability to economic shocks

and fluctuations in external demand and transport routes persists;

- Connectivity grows slowly and does not generate a scaling effect.

### Early indicators (2026–2027):

- Absence of stable joint procedures and measurable connectivity KPIs (time/data/document compatibility);
- Weak translation of expert assessments into coordinated decisions;
- Continued reactive policy responses despite available infrastructure opportunities and external interest.

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## I SCENARIO «FRAGMENTED HUB»

External competition is high and coordination is weak. The region remains important for external actors, but states act separately, and projects begin to compete for the same flows and investments.

### Key features:

- Diverging tariffs and procedures across comparable routes; low data compatibility;
- Water issues addressed in emergency mode, increasing seasonal tension;
- Meetings take place without durable technical solutions or measurable KPIs;

- Infrastructure and logistics initiatives compete, increasing transaction costs and uncertainty for businesses.

### Early indicators (2026–2027):

- Growth in episodes where infrastructure projects are interpreted as foreign policy signals;
- Intensified debate over competition for transport flows and “key hub” status;
- Increasing asynchrony in procedures/tariffs and declining manageability of the regional agenda in multilateral formats.



## I Interpretation of the Scenario Matrix

The selection of two axes (the intensity of external competition and the quality of regional governance capacity) is based on the empirical results of expert surveys conducted in 2023–2026 and on the analysis of the current configuration of the regional agenda.

The growing interest of external actors (primarily through the C5+1 formats) in transport routes, energy schemes, critical

materials, and digital infrastructure has a sustained character and forms a long-term structural background. The combination of these two parameters creates a space of strategic uncertainty.

Therefore, the key question is whether the regional system is capable of transforming external impulses into coordinated decisions and using them for intra-regional economic development.

## I The Most Probable Trajectory

The scenario matrix outlines the space of possible trajectories; however, it is also important to identify the probabilistic configuration of the region's development.

Based on the dynamics of 2023–2026, expert assessments, and current institutional practice, it can be stated that the region is already situated within a zone of heightened external competition.

The intensity of external interest does not demonstrate a tendency to decline. The politicization of certain economic decisions is becoming part of the international environment.

Under these conditions, the baseline trajectory appears to lie between the scenarios “Institutional Acceleration under Pressure” and “Fragmented Hub.”

External pressure and competition are in-

creasing, while the quality of regional coordination remains uneven and sectorally fragmented.

In certain areas, movement toward procedural compatibility can be observed, particularly in transport connectivity (along the Middle Corridor) and infrastructure coordination. In other sectors, including water resource management and energy balancing, elements of reactive regulation and seasonal tension persist.

Thus, the most probable trajectory in the coming years is a situation in which the region simultaneously experiences external competitive pressure and gradually strengthens institutional mechanisms of coordination. The final direction will depend on how quickly technical and sectoral formats of interaction can evolve into stable and regular practice.

## I Risk Poles

From the perspective of strategic risks, the scenario “Fragmented Hub” represents the greatest vulnerability. In this mode, external competition over transport and logistics routes intensifies, while coordination efforts within the region remain disjointed.

Differences in tariffs, cargo processing procedures, and the absence of compatible regulatory approaches increase transaction costs for businesses. Experts note that Central Asia faces “infrastructure bottlenecks, incompatible tariffs, and

shortages of rolling stock,” which limit its potential as an integrated transport hub and slow its integration into international supply chains.

High transport and trade costs remain a persistent challenge for a region located far from major seaports. The Organisation for Economic Co-operation and Development (OECD) emphasizes that the distance from large global markets and elevated transport costs constrain the competitiveness of Central Asian countries and their attractiveness for investment.

If this scenario materializes, the functioning of transport corridors and logistics chains becomes dependent on bilateral agreements and external political decisions, which weakens the region’s overall negotiating position and increases dependence on decisions taken by major external actors.

The second risk pole is represented by the scenario “Reactive Stabilization.” It does not imply a sharp deterioration of external conditions; however, it reflects the persistence of structural constraints in regional governance capacity.

Under such conditions, even moderate changes in the geoeconomic or political environment can exert a disproportionately strong influence on the stability of transport and institutional mechanisms.

For example, uncoordinated operation of border services, differences in standards and border-crossing rules, and the absence of a unified infrastructure management mechanism lead to delays and increased costs of cargo flows along transport corridors.

Research indicates that incompatibility of transport and trade procedures among countries of the region limits the effectiveness of corridors even where physical connectivity already exists.

Improvement of road and railway infrastructure without parallel enhancement of “soft infrastructure” (coordination of procedures, harmonization of documentation, alignment of tariffs) results in a situation where any external fluctuation, for example changes in transit demand or shifts in global logistics routes, produces significant volatility in corridor operations<sup>2</sup>.



## | Window of Opportunity

The scenario “Institutional Acceleration under Pressure” represents the most realistic window of opportunity for the region under conditions of intensifying external competition.

Recent years demonstrate that growing interest in the Middle Corridor, the expansion of C5+1 formats, and increased attention to critical materials objectively raise the political sensitivity of infrastructure decisions.

Under these conditions, resilience is determined by the ability of states to develop coordinated procedures rather than solely by their capacity to attract investment.

During 2022–2024, attempts to synchronize approaches across several projects were already observed.

Increased attention to the harmonization of customs procedures, digital data exchange, and reduction of border-crossing times reflects the recognition that route competitiveness depends on the predictability of the regulatory environment.

Similarly, the intensification of dialogue on transboundary water issues indicates a transition from episodic responses to the search for stable mechanisms for coordinating resource-use regimes. Within this scenario, external pressure becomes a factor accelerating institutional development.

The establishment of permanent technical mechanisms, the formation of standards for preliminary legal and sanctions risk assessment, and the harmonization of requirements for infrastructure data and documentation reduce uncertainty for investors and partners.

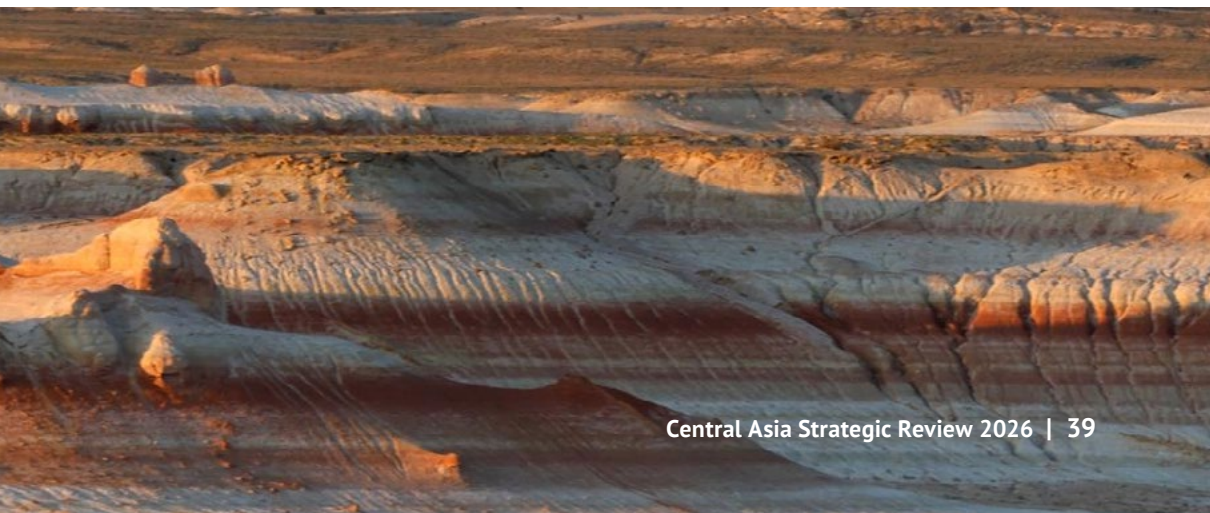
The region preserves diversification of external economic relations, engaging with the European Union, China, the Russian Federation, the United States, Türkiye, and other actors, while simultaneously strengthening its own procedural governance capacity.

This trajectory enhances regional subjectivity in practical terms. External projects pass through a coordinated regional framework, reducing the likelihood of intra-regional competition and strengthening the region’s negotiating position.

The scenario “Managed Consolidation” remains the most favorable from the perspective of long-term resilience.

However, its implementation presupposes a high level of institutional discipline, sustained regularity of technical coordination, and deep procedural compatibility.

Under current conditions, characterized by persistent asymmetry in economic structures and differences in institutional maturity, achieving such a level of coordination requires consistent and long-term effort.



# FORESIGHT 2040-2050: PROJECTIONS OF INTERNATIONAL ORGANIZATIONS FOR CENTRAL ASIA

The analytical model of this study is based on the premise that regional resilience is determined by the coherence of four levels: resource, infrastructure, institutional, and socio-demographic.

In the medium term, resilience manifests through the region's ability to manage current risks and coordinate state actions.

In the long-term horizon to 2040–2050, the key factor becomes the **dynamics of their change** and the relative pace of these changes.

Foresight analysis examines how the region's core structural parameters are transforming and whether institutional and infrastructural mechanisms will be able to adapt to increasing resource and social pressure.

## I Resource level: water, climate, energy

By 2050, climate change becomes one of the most persistent and structurally defining factors of the regional environment.

Accelerated warming has been recorded in the mountain systems of Central Asia. In the Tien Shan area, the average temperature after 1998 was about **1°C higher** than during 1960–1998, accompanied by glacier retreat and reduction of snow cover. This leads to **disruption of the seasonal runoff** structure. A shift of **peak river discharge up to one month earlier and a decline in summer water availability** are expected, precisely when demand for water from agriculture and energy is at its highest<sup>3</sup>.

The loss of a significant share of glacial resources in the mountains of Kyrgyzstan and Tajikistan reduces the long-term predictability of water supply for downstream countries, but the key risk is linked not only to the volume of water, but to its seasonal distribution. Modeling for Central Asian basins (moderate and high warming scenarios) shows a steady tem-

perature increase across all basins, while precipitation may increase in the north and decrease in the south of the region. As a result, a more pronounced **summer water deficit** is forming alongside a rise in hydrological extremes. For the headwater regions of the Pamirs, estimates of changes in water resources range from **-0.48% to +5.6%**, indicating high uncertainty but also increasing variability in water supply regimes<sup>4</sup>.

Water stress is acquiring a systemic character. In Central Asia, water **withdrawal volumes are already close to the level of water availability**, and Turkmenistan and Uzbekistan are among the most water-stressed countries in the region. Thus, even moderate climatic shifts intensify the structural imbalance between water demand and supply.

Climate impact also extends to the agricultural cycle. For Kyrgyzstan and Tajikistan, **phenological phases are projected to shift 1–2 weeks earlier**, altering agronomic regimes and increasing the

sensitivity of yields to weather anomalies. In northern Kazakhstan, Uzbekistan, and western Turkmenistan, where rain-fed agriculture remains significant, production becomes more dependent on precipitation instability.

The energy dimension of climate stress manifests through two channels. First, hotter summer conditions cause a **steady increase in electricity demand for cooling**, exceeding the potential reduction in winter heating needs. Second, water scarcity raises the role of **energy-intensive water supply and regulation** methods (pumping, storage, long-distance delivery), increas-

ing the interdependence of “water–energy” systems. Thus, climate dynamics simultaneously raise both water demand and the energy costs of securing it.

Climate stress will be reflected in socio-economic consequences: growing budget expenditures on infrastructure adaptation, reduced labor productivity in climate-sensitive sectors, and increased price volatility for food and utility services. Taken together, the resource level forms a long-term “pressure base” on regional systems, to which institutional, infrastructural, and social levels of development must adapt.



# Infrastructure level: transport and connectivity

Transport infrastructure is becoming one of the key drivers of Central Asia's development. The growth of economic activity, urbanization, and the region's transit role is leading to a multiple increase in transport load.

According to modeled scenarios, total freight activity in the space of North and Central Asia, which includes the countries of Central Asia, will increase by 161–206% by 2050 compared to 2015<sup>5</sup>.

**The main contribution comes from the non-urban segment**, including interregional and international transport, which by mid-century grows more than fourfold under the baseline scenario and roughly 3.5 times under structural transformation scenarios. This implies a sharp rise in pressure on transit corridors, main railway lines, and international road routes<sup>6</sup>.

**The modal structure of freight transport is also changing.** By 2050, road and rail account for over 70% of non-urban freight flows, while the share of maritime transport in this macro-regional system declines to below 3%, and to around 1% under deep transformation scenarios. Thus, the resilience and capacity of land corridors become a critical condition for the region's economic connectivity<sup>7</sup>.

The growth of freight flows stimulates the development of key directions—the Trans-Caspian route, North–South and East–West corridors, expansion of dry ports, modernization of railway and road infrastructure, and greater efficiency at border crossings. A combination of infrastructure investment, digitalization of procedures, and institutional reforms could reduce average logistics costs along regional land routes by 25–35%, while expanding access to external markets<sup>8</sup>.

**Passenger mobility is also rising.** Non-urban passenger transport more than doubles by 2050 in all scenarios compared to 2015, increasing the importance of intercity and cross-border connectivity. In cities, the pressure is even higher: passenger turnover rises by 110–160%, creating additional strain on urban transport networks, public transport, and interchange infrastructure.

**The structure of urban mobility is also transforming.** While in 2015 private cars and motorcycles accounted for about 44% of urban trips, by 2050 their share declines to 30% in sustainable transformation scenarios, while the share of shared and service-based mobility rises to 17%. This reflects a shift in infrastructure needs toward digital platforms, integrated transport systems, and a stronger role for public transport.

**Infrastructure expansion also has an energy-climate dimension.** Under the baseline scenario, freight transport emissions could increase by 91% by 2050 compared to 2015, and road transport emissions by nearly 97%. Under structural transformation scenarios, by contrast, emissions decline by 38–49% for freight and 40–48% for road transport. Thus, the trajectory of infrastructure development directly shapes not only connectivity but also the carbon profile of the region's economy.

Taken together, the infrastructure level forms the long-term foundation of regional integration and economic dynamics. The multiple growth of freight and passenger flows, the rising role of land corridors, and the increasing complexity of urban mobility turn the transport system into one of the main structural factors of Central Asia's resilience by mid-century.



## **Institutional level: state institutions and international cooperation**

The institutional system becomes a key factor determining Central Asia's development trajectory. The quality of public administration, the effectiveness of law enforcement, the level of trust in institutions, and the state's ability to implement policy in practice directly affect economic growth, social stability, and adaptation to external shocks<sup>9</sup>.

Institutional development manifests itself in the practical capacity of state systems. This is most clearly visible in the social sphere. According to the regional Generation 2050<sup>10</sup> analysis, a significant asymmetry in institutional capacity within child protection and social service systems is already evident. This gap reflects

differences in the ability to prevent social vulnerability, support families, and deliver high-quality individualized work with vulnerable groups.

By 2050, demographic and social pressures will intensify demands on institutional capacity. This concerns not only social protection systems, but the entire framework of public administration, including civil service human resource management, the training of managerial personnel, the digitalization of processes, and the ability of state bodies to address complex cross-sectoral tasks<sup>11</sup>. These assessments indicate that the institutional challenge of 2050 will be expressed in the scale of administrative and кадровой mobilization comparable to major structural reforms.

In the international institutional dimension, a key direction is the deepening of intergovernmental coordination. Sustainable regional development is linked to a transition toward a more open model of regionalism, implying coherence in trade, investment, and migration policies, as well as joint management of transboundary resources. At the same time, the role of international organizations and regional platforms grows as mechanisms for policy coordination, data exchange,

standard-setting, and institutional capacity building.

Long-term scenario documents thus set the direction of institutional evolution, but as a rule do not provide precise quantitative forecasts regarding the structure of international organizations or the formal parameters of regional institutional architecture by 2050.

Therefore, the institutional level is defined less by changes in the list of organizations than by the expansion of their functional role, the density of coordination, and the capacity of regional states to use international formats as instruments for implementing domestic development policy.

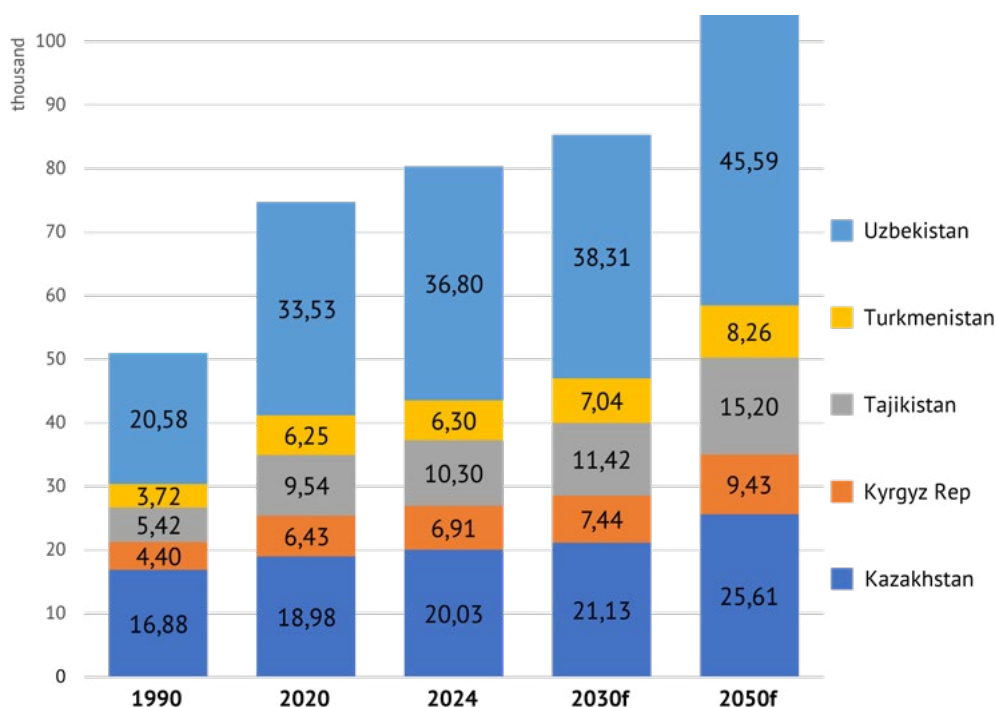
Taken together, the institutional level forms the foundation of the region's long-term resilience. Convergence toward higher governance standards, strengthening кадровой and organizational capacity of social systems, and deeper intergovernmental coordination become key conditions for ensuring that Central Asia's economic, demographic, and infrastructural growth by 2050 is accompanied by social stability and manageable development processes.

## Socio-demographic level: population and urbanization

Demographic dynamics are becoming one of the fundamental structural factors shaping Central Asia's development. The region is undergoing substantial population growth alongside shifts in age structure and reproductive patterns. From 1990 to 2024, the population of Central Asian countries increased from 50 million to 80 million people, representing a 60% rise, or nearly 30 million additional people.

Projections indicate that by 2050 the region's population will exceed 103.9 million. Uzbekistan (45.5 million) and Kazakhstan (25.6 million) will remain the largest countries, followed by Tajikistan (15.2 million), Kyrgyzstan (9.4 million), and Turkmenistan (8.2 million). Thus, the region's demographic scale continues to expand, reinforcing its economic and socio-political significance.

**Figure 8.** Population of Central Asian countries in selected years.



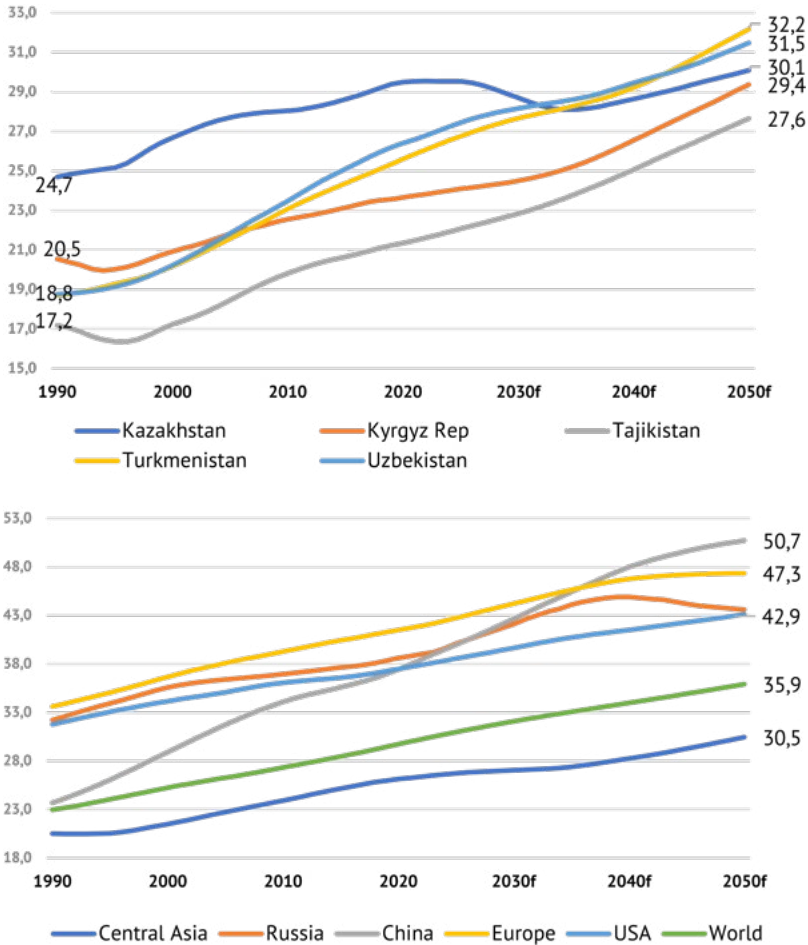
**Source:** United Nations, Department of Economic and Social Affairs, Population Division (2022). *World Population Prospects 2022, Online Edition*.

The chart demonstrates sustained demographic growth across all states of the region, with Uzbekistan and Kazakhstan maintaining the largest population shares. By 2050, Central Asia's total population is projected to increase substantially, underscoring the growing importance of human capital, employment, urbanization, and social infrastructure as key determinants of regional resilience and long-term economic development.

At the same time, fertility regimes are transforming. In all regional countries except Kazakhstan, fertility rates have declined: in Uzbekistan from 35 to 26 births per 1,000 people (1991–2022), in Tajikistan from 41 to 27, in Kyrgyzstan from 29 to 24, and in Turkmenistan from 34 to 22. Kazakhstan remains relatively stable at around 23 per 1,000. Despite this decline, the total fertility rate in the region reached 2.97 children per woman in 2021, higher than the global average (2.32) and significantly above the levels in Russia, Europe, China, and the United States. This sustains a relatively young age structure.

The population's age structure is gradually shifting toward "maturation," yet remains younger than in most developed regions. The median age in Kazakhstan rose from 24.7 years (1990) to over 32 years, in Kyrgyzstan from 20.5 to 31.5, in Tajikistan from 17.2 to 29.4 (by 2050), in Turkmenistan from 18.8 to 30.1, and in Uzbekistan from 20.8 to 27.6. On average, the regional median age will increase from about 20.5 to 30.5 years by 2050, remaining below the global median (35.9 years). This signals a gradual transition from a "youthful" demographic profile to a more mature one, with growing pressure on employment systems, healthcare, and social protection.

**Figure 9.** Median age of the total population in Central Asian countries and selected regions.



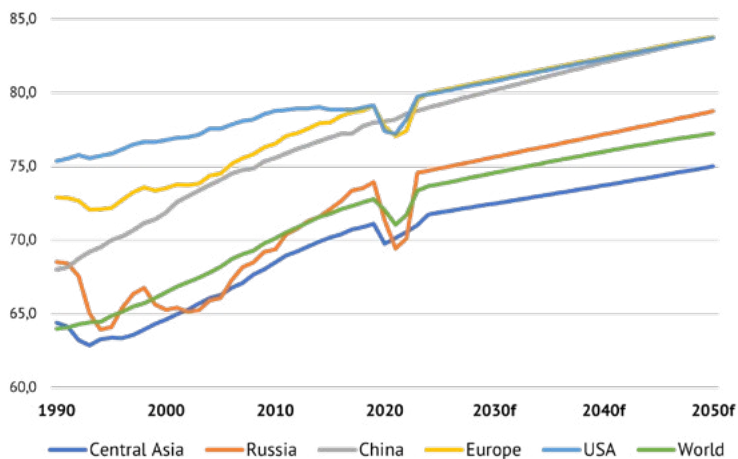
**Source:** United Nations, Department of Economic and Social Affairs, Population Division (2022). *World Population Prospects 2022, Online Edition*.

The figures illustrate a steady increase in median age across all Central Asian states while the region maintains a younger demographic profile compared to Europe, Russia, and China. Rising median age signals a gradual demographic transition affecting labor markets, social burden, and human capital systems. By 2050, Central Asia remains comparatively younger than most major economies, creating both opportunities for economic growth and the need for modernization of education, employment structures, and social infrastructure.

Significant improvements are also observed in health indicators. Infant mortality in the region declined from 58.6 per 1,000 live births (1991) to 15.4 (2021) and may fall further to 7.7 by 2050. Maternal mortality has also decreased substantially: in Kazakhstan from 56.3 to 13.4 (2000–2020), in Tajikistan from 67.5 to 16.6, and

in Turkmenistan from 26.1 to 5.1. These trends have contributed to an increase in life expectancy from 64.1 years (1991) to 70.1 years (2021). Improved population health strengthens the region’s demographic potential but simultaneously increases the long-term obligations of social systems.

**Figure 10.** Life expectancy at birth in selected countries and regions.



**Source:** United Nations, Department of Economic and Social Affairs, Population Division (2022). *World Population Prospects 2022, Online Edition*.

The trend shows a steady rise in life expectancy across all regions following the turbulence of the 1990s and the temporary decline in the early 2020s. Central Asia gradually narrows the gap with global averages but remains below Europe, the United States, and China. By 2050, life expectancy is projected to continue increasing, reflecting improvements in healthcare and living standards while also implying greater pressure on social protection systems, labor markets, and public expenditure.

Urbanization is becoming a key factor in spatial transformation. The share of the urban population in the region has reached 45.2%, with significant variation: around 61% in Kazakhstan, 50% in Uzbekistan, 53% in Turkmenistan, while Tajikistan and Kyrgyzstan remain lower at 28% and 37%, respectively. Urban living conditions have improved, as reflected in the reduction of the population living in slum conditions: in Kazakhstan from 24.5% (2000) to 0.8% (2020), in Kyrgyzstan from 15.9% to 2.4%, and in Tajikistan from 60.3% to 17.1%.

Taken together, the socio-demographic level forms the foundation of long-term processes. Population growth, relatively high fertility, increasing life expectancy, urbanization, digital connectivity, and mobility create the potential for a demographic dividend, but also intensify pressure on labor markets, education systems, healthcare, and social infrastructure. The ability to manage these processes becomes one of the key conditions for Central Asia's sustainable development by mid-century.



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