

The Samarkand summit: A renewed dynamic in Central Asia-EU relations

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The first joint summit of the EU leadership with the heads of state and government from five Central Asian countries on 3 and 4 April in Samarkand (Uzbekistan) sent a strong political signal to enhance relations between both sides. The high-level meeting was the culmination of increased efforts by the EU in the past years and months to re-engage with the region. The joint declaration is an example of the more pragmatic and (primarily economic) interest-based approach of the EU in its partnership policy following the start of the new European Commission end of 2024.

Background

The EU adopted its first strategy towards Central Asia in 2007 under the German presidency of the EU¹. Following a more detailed update of the strategy in 2019² the EU's efforts towards the region intensified, resulting in a joint roadmap for deepening ties between the EU and Central Asia in 2023³. While China is the largest individual trading partner, the EU is the biggest foreign investor in Central Asia⁴. In the last seven years, trade turnover between the Central Asian countries and the EU has quadrupled, going up to 54 billion euros. While some of the increase particularly between 2022 and 2023 is strongly suspected to be due to the circumvention of the EU's sanctions against Russia, the steady growth of trade even before 2023 between Kazakhstan, Uzbekistan and the EU for instance shows a genuine dynamic. Ties have also intensified through bilateral economic, security and other ties between EU member states with Central Asia. During the Global Gateway investors forum in January 2024, organized between the EU and EBRD more than 10 billion Euros were raised to support sustainable transport connectivity, strengthen regional integration and economic development, and substantially increase container traffic between both regions. In addition, in the past two years several EU heads of state and government from the EU visited Central Asia, including from Germany and France. Engagement with civil society has also increased significantly in recent years. In January 2025, the fifth EU-Central Asia Civil Society Forum took place in Almaty, where civil society and regional governments contributed ideas to advance the EU-Central Asia Strategy and Global Gateway priorities. The summit on 3 and 4 April in Samarkand

¹ Council of the EU (2007): [The EU and Central Asia: Strategy for a new partnership](#).

² Council of the EU (2019): [New EU strategy on Central Asia](#).

³ Council of the EU (2023): [Joint Roadmap on deepening ties between the EU and Central Asia](#)

⁴ [https://www.consilium.europa.eu/en/infographics/eu-central-asia-trade/#:~:text=The%20European%20Union%20remains%20the,\(over%20%E2%82%AC100%20billion\)](https://www.consilium.europa.eu/en/infographics/eu-central-asia-trade/#:~:text=The%20European%20Union%20remains%20the,(over%20%E2%82%AC100%20billion)).

was thus the culmination of these efforts to pull the relations with the region on a higher level.

Overall, the EU relations with the five individual countries differ significantly. The relationship between the EU and **Kazakhstan** began right after independence and culminated in a comprehensive and advanced Enhanced Partnership and Cooperation Agreement (EPCA) that entered into force in 2020. The EPCA has significantly boosted the country's trade with the EU which is Kazakhstan's biggest trading partner (28% in 2023) and also the first foreign investor. In 2022 the EU also signed a memorandum of understanding on Strategic Partnerships on Sustainable Raw Materials, Batteries, and Renewable Hydrogen Value Chains. After a difficult time in the second half of the 2000s, EU-**Uzbekistan** relations have become more dynamic under President Shavkat Mirziyoyev with the start of the negotiation of an EPCA in 2018. The economic ties have become stronger since (with 16% of Uzbek imports and roughly 5% of its exports in 2023: In 2024, Uzbekistan's trade turnover showed an increase of 5.2% compared to the previous year. More than 1000 companies with European capital are now operating in Uzbekistan, and the total volume of investment projects amounts to 30 billion euros. In 2024, the EU has equally signed a memorandum of understanding on Raw Materials. With **Kyrgyzstan** the EU had a partnership cooperation agreement since 1999 and an EPCA was signed by both sides in 2024. Compared to other Central Asian Republics the engagement of the EU with the country – that was for a long time seen as the democratic frontrunner in the region – had a stronger focus on the support of rule of law (including a program focusing on the quality of its legislation and supporting youth, gender equality and human rights). Overall, the EU is Kyrgyzstan's fifth largest trading partner and benefits from tariff-free / quota free access to the EU market for 2/3 of its products under the GSP+ scheme since 2016. **Tajikistan** had a PCA with the EU since 2010 and concluded negotiations for an EPCA in 2024. As Kyrgyzstan is equally currently a beneficiary of the EU's standard GSP. The relationship with **Turkmenistan** has evolved rather recently, based on an interim trade agreement from 2010. The EU delegation to the country has opened six years ago and the European Parliament has so far refused to ratify Partnership and cooperation agreement due to concerns on the human rights situation in the country.

Preparation and expectations ahead of the summit

In the weeks and months that preceded the summit, the EU had signaled in various ways that it was strongly interested in a successful outcome – with very concrete takeaways. During a six-day visit to the region (13-18 March) the recently appointed European Commissioner for International Partnerships Jozef Sikela signed a number of agreements in the context of the EU's Global Gateway initiative to promote joint infrastructure projects in the region⁵. The High Representative of the EU and Vice-President of the European Commission Kaja Kallas equally travelled the region in the

⁵ Bulletin Quotidien Europe 15 March 2025: Global Gateway, Jozef Sikela begins visit to region to strengthen cooperation and connectivity

context of the 20th joint ministerial meeting in Ashgabat on 27 March. The EU strongly expects to strengthen cooperation on infrastructure and connectivity, eyeing to strengthen the Trans Caspian Transport Corridor that links China with the EU through Central Asia and the Caucasus but also gain access to Critical Raw Materials. These goals coincide strongly with the EU's general orientation towards a more pragmatic and interest-driven approach towards its global partners – mirrored by the strong emphasis on Global Gateway as a key instrument to shape its partnerships across the world. The attendance of the five heads of state from the Central Asian countries, Commission President Ursula von der Leyen and EU Council President Antonio Costa can equally be seen as a clear political sign of the EU.

On the Central Asian side there was a clear willingness to increase particularly economic cooperation, in the case of Uzbekistan, Kyrgyzstan and Tajikistan, particularly by signing or ratifying Enhanced Partnership and Cooperation Agreements (EPCAs) but also enlarging the area of cooperations towards new fields such as digital connectivity and increasing tech transfer. In an interview, the Uzbek President Shavkat Mirziyoyev emphasized that the EU is consistently expanding its trade and investment relations with the Central Asian states. On the other hand, there is concern in Central Asia to be put on the spot due to a worsening of the EU's relations not only with Russia but also with China. In the view of the Central Asian countries, strained relations between the EU and China would create serious risks for trade and economic ties between Central Asian countries and China and, consequently, could have a negative impact on their national economies. Moreover, several companies from these countries that supply certain goods to Russia have already fallen under EU and U.S. sanctions. Central Asian countries were equally wary of pressure to do more to avoid circumvention of the EU's sanctions. While the EU's Global Gateway initiative has generated strong interest in Central Asian countries, particularly as a potential alternative to Chinese and Russian investments, there remains limited understanding among national stakeholders about how the Global Gateway functions in practice but also its objectives – even EU representatives themselves initially have sometimes struggled explaining the initiative. This was echoed at the 5th EU-Central Asia Civil Society Forum⁶, in Almaty in January 2025. In Kyrgyzstan, similar concerns have recently been voiced by ministries and institutions, which cite a lack of information about the Global Gateway scope, budget, and access modalities. Nonetheless, there is notable interest in key areas of the Global Gateway initiative such as transport and logistics, digital transformation, green energy, climate resilience, and human capital development — including education, mobility, and entrepreneurship. Stakeholders in civil society and government have however also underlined the need for the Global Gateway to deliver tangible results on the ground. They are particularly interested in programmes focusing on the rule of law, good governance and democratization. Across all Central Asian states, there is a clear demand for EU expertise in

⁶ https://www.eeas.europa.eu/delegations/kazakhstan/5th-eu-central-asia-civil-society-forum-kicks-almaty-kazakhstan_en

developing legal frameworks, as well as cooperation in the areas of environment, climate adaptation, peace, and mediation.

Summit results – a strong political signal and a focus on economy

The attendance by Commission President Ursula von der Leyen and European Council president Antonio Costa as well as the summit document overall send a strong political signal: both sides agreed “to upgrade relations between the EU and Central Asia to a strategic partnership”.⁷ Costa stressed that the summit would mark “the beginning of a new dimension” of relations and would “not be a one-off”, describing the EU as a “predictable and reliable” partner. The declaration itself covers several key areas and in the annex mentions a number of concrete deliverables.

The focus and the most concrete suggestions of the declaration clearly lies in the **economic** area: Commission President von der Leyen announced the mobilization of 12 billion Euros by the EU and its member states in the context of the Global Gateway focusing on infrastructure, transport, climate change, water and energy and raw materials as well as enhancing digital connectivity. An important signal was the commitment to sign the EPCA with Uzbekistan in 2025 and the one in Tajikistan in 2026. The EU will also continue to support the work towards the WTO accession of Uzbekistan and Turkmenistan. Another Investors forum (Trans-Caspian Transport Corridor Investors Forum) will be held in Uzbekistan in 2025, focusing on Critical Raw Materials, mining and energy.⁸ Both sides also welcomed the future strengthened presence of the European Investment Bank (EIB) in the region. Experts expect increased joint-company-ventures that bring EU mining and manufacturing companies to Central Asia. The participants agreed to increase cooperation in the area of raw materials. Commission President von der Leyen emphasized that the EU is promoting a different approach compared to Russia and China, aiming to benefit local industries. The EU plans to support mining and processing locally, thereby creating added value within the Central Asian region.⁹

Aside from economic matters both sides agreed to increase **security cooperation** against terrorism, extremism, cybersecurity and hybrid threats preventing drug and human trafficking, but also disinformation (!) and to explore new possibilities for cooperation including “through the European Peace Facility”.

Remarkably, the declaration mentions a strong commitment **for multilateralism** from both sides, mentioning several initiatives that have been championed by Central Asian countries in the past years. While voting patterns in UNGA or in the UN Human Rights Council show that Central Asian countries have often positioned themselves differently than the EU in multilateral fora, Costa noted that the partners had the same vision in supporting the “multilateral, rules-based international

⁷ The entire declaration can be found here: <https://data.consilium.europa.eu/doc/document/ST-7745-2025-REV-1/en/pdf>

⁸ <https://x.com/SamuelJsdv/status/1908141376367137176>

⁹ See press briefing with Commission President von der Leyen following the summit

order”.¹⁰ The declaration indeed includes a commitments to cooperate for peace, security and democracy and the “fundamental principles of respect for the independence, sovereignty and territorial integrity of all states.

In this context a potentially contentious issue was the question of Ukraine and particularly the criticism directed towards Central Asian countries that they would not only refuse to join **sanctions** against Russia but serve as platforms to circumvent those. While the cooperation has allegedly improved more recently, this remained a possibly thorny issue of discussion ahead of the meeting. Both sides called finally “for a just and lasting peace in Ukraine in accordance with the principles of the UN charter” and agree to limit the circumvention of European sanctions against Russia.

Cooperation on **climate and water** will continue to play an important role; both sides committed to the Paris Agreement and the Central Asian countries committed to reduce methane emissions. On water, the EU will continue the partnership “to improve the situation of the Aral Sea” and will continue to support climate adaptation and energy transition projects such as the (controversial) Rogun Dam in Tajikistan as well as the Kambarate dam in Kyrgyzstan. At the margins of the summit, the EBRD also declared its support for the first green hydrogen plant in the region.

While the joint text declares the “promotion and protection of rule of law, human rights and fundamental freedoms” as a common fundamental values, enumerating a number of rights, the declarations remains fairly general regarding specifics how to uphold the values in the region: The EU merely declared its readiness “to support efforts” to promote those principles and both sides point to the EU-Central Asia civil society forum and welcoming the upcoming EU-Asia Forum on Women leaders.

Analysis and Outlook

first Central-Asia summit successfully sent the intended strong political signal. It will now likely be followed by several investment fora, economic and infrastructure deals and the conclusion of EPCAs with Uzbekistan and Tajikistan. The agreements are likely to increase the trade share of the EU and might even make it the first trading partner in the case of Uzbekistan.¹¹ Progress is equally to be expected on raw material cooperation, digital connectivity and business to business contacts. While the EU may – with the Global Gateway – not be able to reach level of the Chinese BRI, its perceived reliability, predictability and the high standards that accompany EU investments are considered a strong asset by the Central Asian partners. The EU’s more pragmatic approach and the strong focus on infrastructure, connectivity, raw

¹⁰ Bulletin Quotidien Europe 4 April 2025: Europeans advocate mutually beneficial partnership with Central Asia: <https://agenceurope.eu/en/bulletin/article/13615/1>

¹¹ It remains however to be seen whether the agreements will make it through the EP. In 2017, the EPCA with Kazakhstan has received wide backing while the EP has demanded the fulfillment of conditions in 2019 before greenlighting a PCA with Turkmenistan.

materials and economic cooperation resonates well with the expectations of Central Asian partners and is likely to lead to closer ties.

Nonetheless, expectation management will be important: While the EU has effectively increased its engagement, it should be careful not to launch or support too many different heavy (infrastructure) projects at once and thus dilute its possible impact. Overpromising and underdelivering remains thus a risk for the relationship – even if the trip of Commissioner Sikela just a few weeks ahead of the summit was likely a successful proof of the EU's determination to deliver more than just nicely-worded statements.

Despite the EU's increased presence and the significant upgrade of the relations, the EU will continue to be one of only several partners for the Central Asian countries. Particularly China will continue to play a very important role, Russia will likely remain a key security partner for several Central Asian countries. All Central Asian countries are members of the Shanghai Cooperation Organisation (SCO) and three of them of the Russia-led Collective Security Treaty Organization (CSTO). When it comes to voting patterns in the UN and the UN Human Rights Council, Central Asian states (even though to a varying degree) tend still to be closer to China than the EU or Germany and either avoided criticizing Russia in multilateral agreement or in some cases support Moscow's narratives.¹² The EU should therefore not have exaggerated expectations when it comes to the geopolitical dividend of the summit. Geopolitically, Russia retains dominant political and military influence, particularly through labor markets, media space and physical military bases in Tajikistan, Kyrgyzstan and Kazakhstan. In Kyrgyzstan, Russian influence is increasingly reflected in the political sphere, notably through the adoption of restrictive legislation targeting independent media and civil society, such as "foreign agents" laws. This trend reflects a broader imitation of the Russian model of governance and contributes to the shrinking space for civil liberties. China's large-scale infrastructure investments, often presented without governance-related conditions, contrast with the EU's value-based approach. While the EU's approach is appreciated by parts of the population, it can be seen as more demanding by government actors. The economic asymmetry is stark: funding through China's Belt and Road Initiative often far exceeds that of EU instruments. The success of the EU's Global Gateway initiative will therefore hinge on delivering visible, concrete results on the ground.

The business environment in the Central Asian region equally has room for improvement, with legal uncertainty and selective enforcement of regulations remaining obstacles in at least some of the Central Asian countries. Even legally established business operations may face challenges, particularly in strategic or resource-rich sectors such as mining, energy, and infrastructure.

Additionally, culturally, the EU has less influence compared to Russia, Turkey, and even India, especially outside capital cities. These actors have leveraged shared

¹² Examples for the voting pattern of Central Asian countries can be found [here](#), [here](#) and [here](#).

linguistic, religious, or historical ties to build deeper societal engagement. While the EU is associated with quality and standards, its messaging and visibility remain limited.

In addition, periodic social unrest, unresolved border disputes, and challenges in the areas of human rights and political freedom complicate the EU's efforts to pursue sustainable, long-term engagement. The EU, however, continues to be perceived, particularly in Kyrgyzstan, Uzbekistan and Kazakhstan, as a reliable, benevolent and long-term partner. Although civil society remains the EU's biggest ally in promoting its core values in the region, as expected, concerns about the state of rule of law of human rights played a secondary role in the meeting. The EU expressed its commitment to the EU-Central Asia Civil Society Forum as a platform to engage with civil society in advancing the EU Strategy on Central Asia. Although the forum has had limited success in recent years in addressing key challenges (shrinking space for civil society, rule of law concerns), it still signals the EU's interest in continuing to support civil society. The EU has also something to offer when it comes to the strengthening of rule of law and inclusive societies – key prerequisites for lasting prosperity and security.

The EU-Central Asia Summit was a historic milestone for both the EU and Central Asia. This is particularly relevant in the current geopolitical context, where it is becoming increasingly difficult for Central Asian countries to navigate the growing influence of China, Russia, India, and Turkey, while the EU seeks to establish new economic partnerships and expand into new markets to boost its competitiveness. The success of the summit will depend on the implementation of projects on the ground. Measurable outcomes from joint business ventures, infrastructure projects, economic partnerships and rule of law-based environment will be crucial.

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