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Central Asia Briefing – March



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INTRODUCTION

The upcoming **First EU-Central Asia Summit in Samarkand** represents a critical step in the European Union's strategic efforts to strengthen its ties with Central Asia. With rising geopolitical competition from Russia and China, the EU seeks to strengthen its regional influence through increased cooperation in trade, energy, infrastructure, and security. Italy's growing influence on Kazakhstan's agriculture highlights the EU's wider plan to boost Central Asian economies, showing Europe's increased presence as other global players decrease theirs.

The reports featured here follow SpecialEurasia's monitoring activities in the region, providing insights into critical developments in March 2025. We structured each report with an **Executive Summary** and a section titled **Why does it matter?** to guide the reader in understanding the implications of recent events in Central Asia. For those seeking further in-depth analysis, this document offers hyperlinks to the complete original reports, allowing deeper exploration of border agreements, energy projects, and regional diplomatic shifts.

The reports offer valuable insights into the region's developing political and economic trajectory, providing a comprehensive analysis of the challenges and opportunities that will likely influence the discussions at the Samarkand Summit.

ITALIAN-KAZAKH AGRICULTURAL COOPERATION AND GEOPOLITICAL IMPLICATIONS

Date: 1 April 2025

Link: <https://www.specialeurasia.com/2025/04/01/italy-kazakhstan-agriculture/>

Executive Summary

Italy's TRAMITE Group is investing \$100 million in Kazakhstan's agricultural sector, aligning with Astana's strategy to increase processed agricultural exports and attract foreign capital. This project underscores Italy's growing economic ties with Central Asia, mirroring the EU's wider strategy to build stronger relationships in a region historically influenced by Russia and China. As the U.S. reduces its involvement, the EU is stepping in to expand trade, infrastructure, and energy partnerships.

Why does it matter?

Kazakhstan's ability to manage diverse foreign partnerships while ensuring economic transparency and stability will shape its long-term geopolitical and economic trajectory, influencing the regional balance of power.

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TAJIKISTAN, UZBEKISTAN AND KYRGYZSTAN'S LEADERS SIGNED A HISTORICAL AGREEMENT IN KHUJAND

Date: 31 March 2025

Link: <https://www.specialeurasia.com/2025/03/31/khujand-declaration-central-asia/>

Executive Summary

The Khujand Declaration, along with the Tajikistan-Kyrgyzstan-Uzbekistan border agreement, represents significant progress toward regional stability and diplomatic cooperation in Central Asia. These agreements offer opportunities for enhanced economic integration, infrastructure development, and conflict resolution, but challenges remain, including public opposition, water disputes, and external geopolitical influences. Effective implementation and sustained political will be crucial to ensuring long-term success.

Why does it matter?

Central Asia's stability directly affects regional security, global trade routes, and geopolitical competition, as external powers like China, Russia, and the EU seek to shape the region's future according to their strategic interests.

RUSSIA'S CULTURAL DIPLOMACY IN UZBEKISTAN AND CENTRAL ASIA THROUGH ROSSOTRUDNICHESTVO

Date: 31 March 2025

Link: <https://www.specialeurasia.com/2025/03/31/rossotrudnichestvo-central-asia/>

Executive Summary

Russia is expanding its cultural diplomacy in Uzbekistan through *Rossotrudnichestvo's* initiatives in theatre, film, and education, reinforcing its influence in Central Asia amid increasing competition from China, Turkey, Iran, the EU, and the Gulf states. Moscow's strategy

aligns with its broader geopolitical objectives, using cultural engagement to maintain its presence in the Eurasian Economic Union and counterbalance Western and regional rivals.

Why does it matter?

The “cultural geopolitical game” in Central Asia reflects broader global power shifts, where Russia, China, and regional players use soft power to shape influence, affecting the region’s long-term political and economic alignment.

ANALYSIS OF THE EU-CENTRAL ASIA MINISTERIAL MEETING IN ASHGABAT

Date: 29 March 2025

Link: <https://www.specialeurasia.com/2025/03/29/eu-central-asia-meeting-ashgabat/>

Executive Summary

The recent EU-Central Asia ministerial meeting in Ashgabat and the upcoming Samarkand Summit highlight Brussels’ strategic efforts to bolster economic ties, improve regional stability, and impose sanctions on Russia. While the EU seeks to balance Russian and Chinese influence through trade diversification and infrastructure projects, its sanctions policy places economic strain on Central Asian states and risks provoking retaliation from Moscow and Beijing.

Why does it matter?

Central Asia’s role as a geopolitical crossroads is intensifying as the EU, Russia, and China compete for influence, shaping the region’s economic and security landscape with global implications.

FERGANA VALLEY: STABILITY, DEVELOPMENT, AND STRATEGIC INTERESTS

Date: 27 March 2025

Link: <https://www.specialeurasia.com/2025/03/27/fergana-valley-stability/>

Executive Summary

The Fergana Valley remains a crucial geopolitical and economic hub in Central Asia, with its future shaped by border resolutions, security threats, and economic development. While recent agreements on demarcation provide a framework for stability, unresolved ethnic tensions and the risk of extremism continue to pose challenges. However, sustained cooperation among Uzbekistan, Kyrgyzstan, and Tajikistan, alongside strategic involvement from external actors, will be essential in ensuring long-term stability and growth.

Why does it matter?

The Fergana Valley’s stability directly affects Central Asian security, trade connectivity, and broader geopolitical rivalries, making it a focal point for both regional and global actors.

CASA-1000 AND CENTRAL ASIAN REGIONAL STABILITY

Date: 25 March 2025

Link: <https://www.specialeurasia.com/2025/03/25/casa-1000-and-central-asian/>

Executive Summary

The CASA-1000 project stands as a pivotal test for regional cooperation and energy security in Central Asia, linking hydroelectric power from Tajikistan and Kyrgyzstan to Afghanistan and Pakistan. Its success hinges on managing security risks, geopolitical competition, and domestic opposition to border agreements. While it presents opportunities for economic integration and foreign investment, unresolved water-energy disputes and Afghanistan's instability remain key risks.

Why does it matter?

CASA-1000's success could drive economic integration and infrastructure development in Central Asia, but failure may exacerbate geopolitical rivalries, destabilise energy markets, and heighten regional tensions, affecting global trade and security interests.

FROM PARIS TO TASHKENT: FRANCE'S STRATEGY IN UZBEKISTAN AND CENTRAL ASIA

Date: 19 March 2025

Link: <https://www.specialeurasia.com/2025/03/19/france-uzbekistan-central-asia/>

Executive Summary

France and Uzbekistan have strengthened their strategic partnership through economic, energy, and security agreements, marking a deeper European engagement in Central Asia. France's €5 billion investment package, defence cooperation, and the establishment of the Uzbek-French Investment Council highlight growing European influence. This aligns with Italy's expanding ties with Kazakhstan, signalling a coordinated EU approach to counterbalance Russian and Chinese dominance in the region.

Why does it matter?

The EU's increasing presence in Central Asia enhances regional stability, diversifies energy partnerships, and reduces dependency on Russia and China, shaping the geopolitical balance in one of the world's most strategically significant regions.

Intelligence Briefing: Kyrgyzstan-Tajikistan Border Agreement

Date: 18 March 2025

Link: <https://www.specialeurasia.com/2025/03/18/tajik-kyrgyz-border-agreement/>

Executive Summary

On 13 March 2025, Kyrgyzstan and Tajikistan signed a historic border agreement, resolving a long-standing dispute and reopening crucial trade and travel routes. This breakthrough promises to enhance regional stability, economic cooperation, and integration, while also setting the stage for expanded energy projects like CASA-1000. However, unresolved water resource issues and potential external interference pose ongoing risks to the agreement's full implementation.

Why does it matter?

The resolution of this border dispute represents a critical step towards regional peace and economic growth, reducing the risk of military confrontations and fostering deeper regional

cooperation in Central Asia, while highlighting the importance of addressing underlying resource conflicts to ensure long-term stability.

INSIGHTS FROM TURKMENISTAN'S INTERNATIONAL INVESTMENT FORUM AND EXHIBITION

Date: 17 March 2025

Link: <https://www.specialeurasia.com/2025/03/17/turkmenistan-investments-forum/>

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Executive Summary

Turkmenistan's "Investments in the Future of Turkmenistan" forum, held in March 2025, signals the country's push for economic diversification and greater private sector engagement. Despite promising developments in infrastructure, foreign investment, and regional energy projects, Turkmenistan's heavy reliance on hydrocarbons, governance issues, and security risks remain significant challenges. The country's geopolitical importance and potential for diversification offer growth opportunities, but these depend on political and economic reforms.

Why does it matter?

The outcome of Turkmenistan's efforts to attract foreign investment and reduce reliance on hydrocarbons will be crucial for regional stability and energy security, impacting broader geopolitical dynamics in Central Asia and the global energy market.

ITALY-KAZAKHSTAN RISING COOPERATION HIGHLIGHTS THE KEY ROLE OF THE FIRST EU-CENTRAL ASIA SUMMIT

Date: 11 March 2025

Link: <https://www.specialeurasia.com/2025/03/11/italy-kazakhstan-eu-central-asia/>

Executive Summary

The visit of Italian President Sergio Mattarella to Kazakhstan in March 2025 highlights Italy's strengthened bilateral relationship with Kazakhstan, focusing on energy, trade, and regional security. Italy's increased presence in Central Asia reflects broader European Union ambitions to enhance engagement with the region, particularly through the upcoming EU-Central Asia summit.

Why does it matter?

The EU's deepening ties with Central Asia, particularly through energy cooperation and infrastructure development, provide an opportunity for the EU to expand its influence in a region traditionally dominated by Russia and China, filling the gap left by a retreating U.S. presence.

KAZAKHSTAN AND TURKEY'S GROWING ROLE IN AFGHANISTAN THROUGH AGRICULTURAL AND HUMANITARIAN COOPERATION

Date: 9 March 2025

Link: <https://www.specialeurasia.com/2025/03/09/kazakhsta-turkey-afghanistan/>

Executive Summary

Kazakhstan and Turkey are deepening their influence in Afghanistan through agricultural and humanitarian initiatives, including Kazakhstan's lead role in the Islamic Organisation for Food Security (IOFS) and Turkey's involvement via TIKA. This growing collaboration aims to reduce their reliance on Russia and China while enhancing regional stability and fostering closer ties with Central Asian states. However, these efforts risk provoking diplomatic tensions with Moscow and Beijing, potentially destabilising the region's geopolitical landscape.

Why does it matter?

Kazakhstan and Turkey's growing influence in Afghanistan could reshape Central Asia's geopolitical balance, challenging Russia and China while offering new opportunities for regional integration and stability.

ABOUT SPECIAL EURASIA

Special Eurasia is a consulting and media agency specialising in geopolitical intelligence and risk assessment. We empower businesses, government agencies, and organisations with the critical insights needed to navigate today's rapidly evolving geopolitical landscape. Our expertise spans from strategic intelligence and risk analysis to media reporting and specialised training, ensuring our clients stay ahead of emerging challenges and seize new opportunities.

Our Mission

At Special Eurasia, we bridge the gap between intelligence and decision-making by delivering accurate, actionable, and forward-thinking analysis. We combine traditional geopolitical expertise with cutting-edge intelligence methodologies, helping our clients mitigate risks, enhance security, and make informed strategic decisions in an increasingly complex world.

Our Services

1. Geopolitical Intelligence & Risk Assessment

- a. **Country Risk Analysis:** In-depth assessments of political, economic, and social dynamics to anticipate potential risks and opportunities.
- b. **Geopolitical Forecasting:** Advanced predictive analysis to help organisations adapt to global shifts.
- c. **Political Due Diligence:** Comprehensive evaluations of political landscapes, regulatory environments, and governance risks in target markets.
- d. **Security Risk Assessment:** Threat and vulnerability analysis to safeguard assets, personnel, and operations.

2. Media & Intelligence Reporting

- a. **Weekly/Monthly Monitoring Reports:** Concise updates on geopolitical events, security trends, and economic shifts impacting businesses and governments.
- b. **Specialised Intelligence Reports:** Tailored reports addressing regional conflicts, political instability, and security threats.
- c. **Media Analysis & Strategic Communications:** Assessing information flows, disinformation trends, and media influence in geopolitical contexts.

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SpecialEurasia Media Agency

In January 2025, SpecialEurasia expanded its expertise with the establishment of a dedicated Media Agency. This initiative enhances our ability to deliver reliable, data-driven intelligence reports focusing on geopolitical risk, security, and investment trends. Through expert-led analysis and real-time monitoring, our media division provides objective, fact-based insights that support businesses, policymakers, and the public in understanding global developments.

Why Choose SpecialEurasia?

- ✓ **Expertise:** Our team consists of experienced analysts, security experts, and geopolitical specialists dedicated to delivering high-quality intelligence.
- ✓ **Precision & Reliability:** We ensure accurate, well-sourced, and actionable insights, allowing clients to make data-driven decisions.
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- ✓ **Strategic Partnership:** We go beyond analysis—we collaborate with clients, offering ongoing support and advisory to help them thrive in a complex global environment.